

Participant Subscription Management Guidance

Overview

This document is intended to provide project managers (PMs) guidance on managing participant subscriptions in the Program platform. PMs are responsible for maintaining up-to-date and accurate information for each participant. Additional platform features will be available in the future, including: a billing errors tab, the ability to add an ‘effective generation period’ to a participant’s record, and participant request collection through the platform.

Participant Verification

All participants are required to undergo a subscription verification process by the Program Administration (PA) team to confirm the participant’s utility information is correct and ensure that their subscription size is appropriate based off their historical consumption. Once a participant is entered in the platform, assigned to a project, and ready to be reviewed, they should be submitted to *PA review* in the *Administration* tab. The PA team will review participants in *PA review* status on a weekly basis and return the results to the project manager. The participant profile is locked once submitted for *PA review*, and changes cannot be made by the PM unless requested of the PA.

Table 1: Participant Verification Results

Verification Action	Participant Contract Status	Action Needed from Project Manager	Result of Participant Contract Status
Verified	Verified	None	Billing will begin if a participant is assigned to an operational project
Warning	Verified	Review verification file and reason for warning	Participant will still be “verified” in the platform, even if the file returned has a warning
Suspend	Suspended	Review verification file to view reason for suspension	Participant profile is now editable; PM can work with the participant to resolve the reason for suspension
Reject	Rejected	Alert customer of ineligibility for program	Participant has been rejected as they do not meet the eligibility requirements for the program, or a duplicate submission was found

Any changes that need to be made to participants in Verified status (including to those that received a warning) should be requested in the *Participant Platform Change Request List* found in the *Subscription Management* folder in SharePoint.

Non-Low-income Participant Status Pathway:



Change Requests to the Program Administration Team

In each project manager's designated SharePoint folder, there will be a *Participant Platform Change Request List* intended to be the main form of communication between the Subscription Manager and the Program Administration team.

Low-income Verification

All low-income participants will go through an intake process with Community Energy Project (CEP). Communication with CEP regarding low-income participants will occur in the *Low-income Lead Management Spreadsheet*. **All participants, whether recruited by the project manager or by CEP, will be entered into the platform by CEP.**

Once the participant is approved by CEP and has gone through the intake process (including getting their subscription sized, if applicable), the PM will be notified via the *Lead Management Spreadsheet* that action is needed. The PM will then need to move the participant from *draft* to *PA Review* to go through participant verification. Minimal platform changes will need to be made by the project manager for low-income participants.

Low-income Participant Status Pathway:



Participant Changes

Participant Moves

In the event that a participant moves within their utility territory, it is expected that their subscription will be transferred to their new location unless they inform the project manager that they'd like to cancel their account. It is essential that the PM be informed of the move as soon as possible to prevent billing delays. If the individual is moving outside of their utility territory, the subscription will need to be canceled. If the participant would like to transfer their subscription, they will need to inform the project manager of the move and provide their new utility identifiers.

If a participant has a new utility account number because of the move, the project manager should inform the PA team that the customer has moved so that the account can be *suspended* until the project manager or the PA team can input the new account information. Once the information has been updated, the profile will need to be submitted for PA review and verified again. Any fees or credits accumulated while the account was suspended will roll over to the next active billing month.

If a participant maintains their utility account number but has a new meter number and/or service agreement number, the new information should be provided to the PA team and a request should be submitted to the PA team to update the platform.

Participant Contract Transfers

Participants are allowed to transfer their subscription to another eligible customer of their choosing. To accommodate this in the platform, the project manager will need to alert the PA team so that the account can be *suspended* and the information in the platform can be updated accordingly. Any credits and fees accumulated while the subscription was in suspended status will carry over when the account is *verified* again.

If a PM would like to move a participant from one project to another to balance project capacity, this can only be done if it is 1) allowable within the Subscriber Agreement and 2) while the Participant is in *draft* status in the platform. Participant transfers between projects are **not** allowed after participant billing has commenced.

Participant Cancellations

If a participant would like to cancel their subscription, there are two ways in which a project manager can submit a cancellation request to the PA team:

- Note the request in the *Participant Platform Change Request List* in the appropriate Project Manager's SharePoint folder; or
- Request cancellation in the *Administration* tab of the participant profile

The Program Administration team will only process participant cancellations for actively billed participants from the 15th to the 23rd of the calendar month. A participant whose subscription is canceled will not receive on-bill community solar credits and charges for the generation occurring in the calendar month of cancellation. The participant may still receive on-bill credits and charges from the prior month's generation after cancellation if they had not been received by the participant at the time of cancellation. Participants whose subscriptions have been canceled in the platform will no longer be actively billed going forward and cannot be re-activated.

To replace a canceled participant's subscribed capacity with a new participant's, the cancellation and the verification of the replacement participant must occur within the same generation month. If verification of a replacement participant does not occur in time, the previously subscribed capacity will be counted toward the unsubscribed power purchase capacity of the project.

Participant Deletions

Only participants in *draft* status can be permanently deleted from the platform. This is to assist PMs in 'cleaning up' a project profile. Any deletion requests should be entered into the *Participant Platform Change Request List*.

An example of a participant change request to the PA team is pictured below. Project managers should provide information about requested changes in the **orange cells only**. Once a participant has been submitted for *PA Review*, changes can no longer be made to the participant profile and a change request should be submitted. Project managers should email the PA team at administrator@oregoncsp.org when requesting a change.

Table 2: Participant Platform Change Request List

Date	Participant #	Project Name	First Name	Last Name	Change Requested	Completed y/n	FD Ticket #
1/1/2022	1	Solar Project	John	Doe	meter number update to 1234567890	n	N/A

Subscription Size Adjustments

Project managers may adjust a participant’s subscription size as needed to prevent the customer from oversubscribing, so long as 1) it is permitted in the participant’s Subscriber Agreement, or 2) the contract is amended to reflect the change. Participant consumption information will be provided to PMs from the PA team to assist in mitigating the risk of oversubscription.

Any subscription change requests should be entered into the *Participant Platform Change Request List* to allow the PA team to make adjustments at the appropriate time of the calendar month. Changes to subscription size will take effect based on the generation month, not calendar month. For example, if a subscription size change is made on February 16, the size will apply to February’s project generation, which may not align with February’s calendar month.

Changing a Participant Customer Type

If a participant is initially entered as one customer type and requires a change to access a different pricing product, the PM will need to request a cancellation and re-enter the participant information into a new profile. For example, if a participant was originally thought to qualify for low-income pricing, but it’s determined that they don’t qualify, the project manager will need to cancel the original profile and submit a new application for the participant.

Participant Contract Length

Project managers are currently responsible for tracking participant contract lengths off-platform.

Participant Waitlists

Project managers are responsible for maintaining participant waitlists off-platform. Prior to verification, a participant can remain in draft status with a subscription size of ‘o’ so as not to count toward the total enrollment capacity of the project to which they are assigned while allowing you to maintain a record of their information within the platform.

Billing Errors

Near the 8th business day of the month, utilities will report any billing errors and participant mismatches to the PA team. The PA team will enter the billing errors into the *Participant Platform Change Request List* to notify the Subscription Manager that an action needs to be taken for specific accounts. It is the PM’s responsibility to resolve billing errors with the customer and investigate participant billing changes. If the issue cannot be resolved between the PM and the participant, the account should be flagged for the PA team to investigate with the utility.

Any changes required to resolve billing issues should be entered into the *Participant Platform Update Request List* so that the PA team knows to update the platform. Note that some changes can only be made in the platform during the last two weeks of the calendar month. The PM should email

the PA team at administrator@oregoncsp.org when platform change requests have been requested. Potential reasons for billing errors and the actions needed to resolve them are listed in Table 3.

Table 3: Billing Error Examples

Rejection Flag	Rejection Reason	PM Action Required
2	Utility account number not found	The existing profile will need to be canceled and a new participant profile will need to be created and go through verification by the PA team to replace subscribed capacity.
3	Service agreement number not associated with account number	In most cases, the participant’s meter number will have changed. The updated meter number will need to be collected from the customer’s most recent utility bill, or the customer will need to call the utility.
5, 6	Account or Subscription Closed—unable to bill	PM will need to check with the participant to see if their utility account has been closed; if so, request cancellation. This error could also be an input error, and the utility identifiers may need to be updated in the platform.

Please upload any physical bills related to billing errors that need to be reviewed by the PA team into SharePoint for review.

Utility Data Exchange Calendar

Below is an example of the Utility Data Exchange calendar that exists between the utilities and the PA team. Please note that this is an example; actual data exchange may vary month to month.

