**Template: Contract Disclosure Checklist**

Registered Project Managers and subcontractors, partners or affiliates working as agents of Project Managers are authorized to use this Disclosure Checklist template.

**INSTRUCTIONS:**

This Disclosure Checklist (“Checklist”) must be completed and provided to all potential Participants when they are presented with a contract. The Checklist is already incorporated into the contract templates for low-income and residential Participants.

The basic formatting of this document must remain as-is and at least a 10-point font must be maintained. The Project Manager may add its logo, if desired

* Text in plain font in this template is unalterable.
* Text in **[ALL CAPS AND BOLD IN SQUARE BRACKETS]** indicates blanks to be filled in when finalizing the contract.
* Text in **{bold in curly brackets}** accompanied by **OR** indicates a selection must be made from a set of options. After a selection has been made, the text in **{bold in curly brackets}** that does not apply may be deleted.
* Text in ***bold italics*** indicates a mandatory provision the contract must meet or exceed. Guidelines are provided on what must be included.
* Text in *italics* is purely instructional and may be deleted.

When preparing this form for a Participant, these instructions should be deleted. This checklist must be completed and provided to the customer in a language they can understand. Spanish and Russian language versions of this template are available in the Resources section of the Program website at [oregoncsp.org.](http://www.oregoncsp.org/)

**Oregon Community Solar Program   
Contract Disclosure Checklist**

This Oregon Community Solar Program (“ORCSP”) Subscription Contract (“Contract”) is entered into on **[DATE]** by, you, **[PARTICIPANT NAME]** and **[PROJECT MANAGER**] (“Project Manager”). You are a customer of **[UTILITY]** eligible to participate in the ORCSP as described in this Contract. Project Manager is a(n) **[DESCRIPTION OF LEGAL ENTITY**]. Together you and the Project Manager may be referred to as the Parties.

Read this Disclosure Checklist and the contract carefully to understand the costs, benefits, and risks of participation.

You may contact your Project Manager by calling **[PROJECT MANAGER CUSTOMER SERVICE NUMBER]**, emailing **[PROJECT MANAGER CUSTOMER SERVICE EMAIL]** or writing to **[PROJECT MANAGER CUSTOMER SERVICE MAILING ADDRESS]**.

**You should contact your Project Manager if:**

* You have questions about the community solar charges on your electric bill or about when your Subscription will begin.
* You move within Oregon and have the same electric utility, and you would like to update your Subscription with new utility information.
* You move out of Oregon or out of your utility service area and need to cancel your Subscription.
* You would like to make another kind of change to your Subscription.

The Oregon Community Solar Program is overseen by the Oregon Public Utility Commission (“OPUC”). If you need additional support, you may contact the ORCSP Program Administrator that administers the program on behalf of OPUC by calling 1-800-481-0510 (calls answered Monday through Friday, 8:00 am to 5:00 pm) or emailing [info@oregoncsp.org](mailto:info@oregoncsp.org). For more information about the Oregon Community Solar Program, including customer eligibility criteria, participant resources, and the Project Manager Code of Conduct, visit [oregoncsp.org](http://www.oregoncsp.org).

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| **Disclosure Checklist** | |
| **PARTICIPANT INFORMATION** | **PROJECT MANAGER INFORMATION** |
| Name: **[NAME]\***  Site Address: **[SITE ADDRESS ASSOCIATED WITH SUBSCRIPTION]**  Phone: [**PHONE]**  Email address: **[EMAIL]**  Utility: **{PGE, PAC OR IDP}**  Account Number: **[UTILITY ACCOUNT #]**  Preferred method of contact for notifications:  **□ phone □ email □ mail □ text** | This organization is responsible for the project you are enrolling in:  Project Manager: **[PROJECT MANAGER BUSINESS NAME]**  Address: **[BUSINESS ADDRESS]**  Phone: **[CUSTOMER SERVICE PHONE]**  Email: **[CUSTOMER SERVICE EMAIL]**  **{Website: [WEBSITE IF AVAILABLE]}**  **{This organization will be your primary point of contact, on behalf of the Project Manager:**  **Subscription Manager: [SUBSCRIPTION MANAGER BUSINESS NAME]**  **Address: [BUSINESS ADDRESS]**  **Phone: [CUSTOMER SERVICE PHONE]**  **Email: [CUSTOMER SERVICE EMAIL]**  **{Website: [WEBSITE IF AVAILABLE]}** |
| **PROJECT INFORMATION** | |
| Project Name: **[LIST PROJECT NAME]**  Project location(s): **[list addresses of all systems THAT ARE part of this project]**  **{Estimated}** date the Project **{will begin} OR {started}** operation: **[MM/DD/YYYY]** | |
| **YOUR SUBSCRIPTION** | |
| You **{own} OR {lease}** part of the Project for the term of the Contract (your **“Subscription”**).  Your Subscription will begin on **{DATE} OR {the date the Project begins operations}** and last for a period of **[YEARS]** years **{and [MONTHS] months}.**  *If the subscription size is known at the time of contracting:*  Subscription Size: **[KW]** kW-AC  Estimated first-year production of your Subscription: **[KWH]** kWh  Estimated total production of your Subscription over the term of the contract: **[KWH]** kWh  The exact amount of energy that your Subscription will produce will vary from year to year.  *If the Subscription size is not known at the time of contracting:*  Your Subscription size will be determined based on your past annual electricity use, which your utility will share with your Project Manager via the Program Administrator. Your Project Manager will then provide you with an updated Contract that reflects this Subscription size and your expected savings levels. | |
| **BILL CREDITS AND CHARGES** | |
| Once your Subscription begins, you will begin to receive Bill Credits for the energy your Subscription generates, and you will begin to pay charges for this amount. You will begin to receive your first credits and charges roughly 1-2 months after your Subscription begins.  **Bill Credits**  You will receive a Bill Credit on your utility bill for the amount of energy produced by your Subscription.  *For Tier 1 Projects:*  Bill Credits for this Project are valued at the Bill Credit Rate of $**[BILL CREDIT RATE]**/kWh.  *For Tier 2 Projects:*  Bill Credits for this Project are valued at a Bill Credit Rate that increases each year. As of **[DATE],** the Bill Credit Rate is $**[BILL CREDIT RATE]**/kWh and will increase by 2% every April for the life of this Contract.  **Subscription Fee**  You will pay your Project Manager a set Subscription Fee **{per month,} OR {per kWh generated by your Subscription,}** whichwill be collected **{as part of your normal electric utility bill, you will not receive a separate bill for these charges.} OR {through a separate bill from your utility bill, sent by your Project Manager.}**  Your Subscription Fee is {$**[SUBSCRIPTION FEE]/kWh} OR** {$**[SUBSCRIPTION FEE] per kW you subscribe to per month} IF ESCALATING, ADD {and will increase by [PERCENT]% every April for the life of this Contract, starting on [DATE].}**  **Program Fees**  *If customers are paying Program Fees:*  You will pay a Program Fee of $**[PROGRAM FEE]** per kW you subscribe to per month. This fee will be collected as part of your normal electric utility bill.  *If customers are paying Program Fees:*  You will not pay any Program Fees. Your Project Manager is paying these fees on your behalf.  **Other Fees and Charges That May Apply**  *List all other fees/charges and their amounts, including: any upfront charges, cancellation fees, subscription transfer fees, late payment fees and all other fees or charges that may apply. If a fee is $0, it does not need to be listed here. If no fees are charged, delete this section.*  **Net Savings**  Your total costs under this agreement are approximately equal to **[PERCENT]** percent of the value of the Bill Credits you will receive. *Describe whether costs may exceed or not exceed benefits.* | |
| **EXPECTED NET SAVINGS** | |
| Your net savings will vary based on your Subscription size and on actual annual solar generation, among other factors. Your Subscription **{has been} OR {will be}** sized to meet approximately **[PERCENT]** percent of your expected annual electricity usage. **{Your Subscription} OR {An illustrative 5 kW Subscription}** is expected to have the following first-year benefits and costs:  Subscription Size: **[kW]** kW  Expected First-Year Subscription Generation: **[kWh]** kWh  Expected Bill Credit: **$[DOLLARS]** ($**[BILL CREDIT RATE]/kWh X [ANNUAL KWH]**)  Expected Subscription Fees: **$[DOLLARS]** ($**[SUBSCRIPTION FEE RATE]/kWh X [ANNUAL KWH]**) **OR ($[MONTHLY FEE] per kW per month x 12)**  Expected Program Fee: **$[DOLLARS]** **($[MONTHLY FEE] per kW per month x 12) OR {No Program Fee}**  **Expected First-Year Net Savings: $[DOLLARS]** | |

**CHECKLIST OF CONTRACT TERMS**

This is a checklist of key contract terms that your Project Manager must share with you, and the page they are located on in the contract.

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| 1. Bill Credits and Charges | **[page #]** |
| 1. Changes to This Contract | **[page #]** |
| 1. Length of the Contract | **[page #]** |
| 1. What Happens If You Move | **[page #]** |
| 1. How to Transfer Your Subscription to Another Utility Customer | **[page #]** |
| 1. Ending this Contract Early | **[page #]** |
| 1. Non-Payment and Utility Disconnection | **[page #]** |
| 1. Changing the Size of Your Subscription | **[page #]** |
| 1. Renewable Energy Credits | **[page #]** |
| 1. Utility Equal Payment Plans | **[page #]** |
| 1. Data Privacy and Security | **[page #]** |
| 1. Notifications about Project Status and Performance | **[page #]** |
| 1. Dispute Resolution | **[page #]** |
| 1. The Project Manager May Sell this Contract | **[page #]** |
| 1. Three-Day Right to Cancel | **[page #]** |
| 1. Consent to Access and Use Your Energy Information | **[page #]** |
| 1. Subscription Information Release | **[page #]** |

By initialing, you acknowledge that you have received and reviewed this Disclosure Checklist and that the person signing has full authority to enter into this agreement on behalf of all name account holders for the Account Number identified in this agreement.

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| Participant Initials | Date | Project Manager Representative Initials | Date |