OREGON COMMUNITY SOLAR PROGRAM

Platform Data Management : Project Manager User Guide

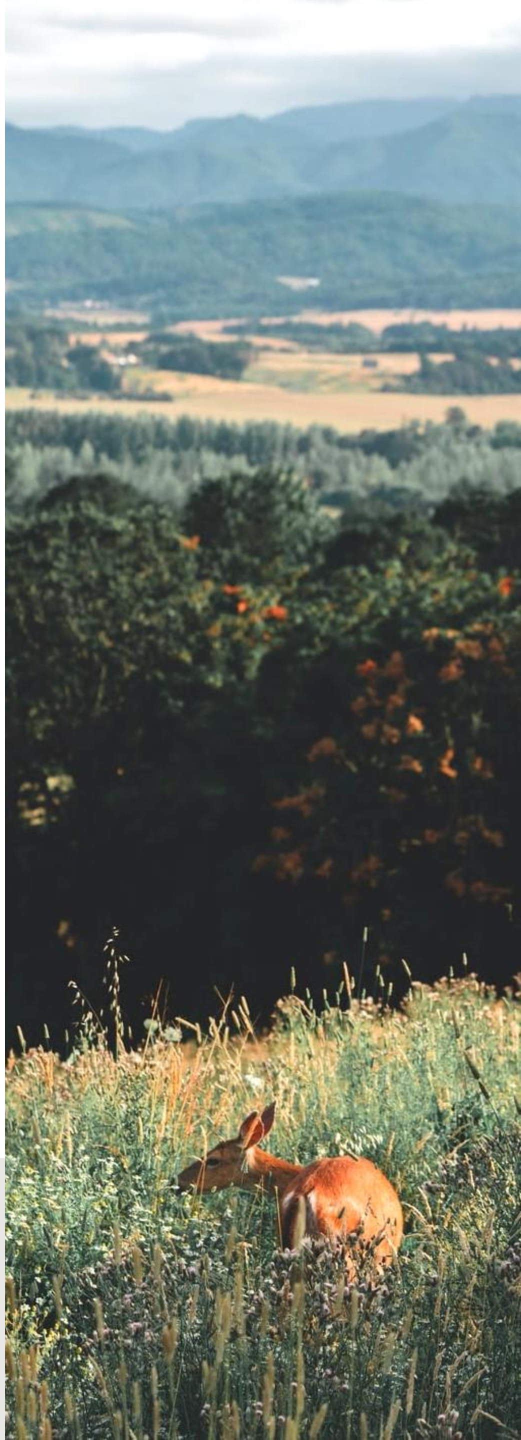
Provided by Energy Solutions

Resource Overview

This resource is intended to help project managers understand and utilize the many data management tools that are available within the Oregon Community Solar Program platform. From unsubscribed energy to participant consumption, each data management tool has a unique focus in reporting specific information pertaining to participant and/or project data for this Program.

In order to understand these data management tools, it is vital to understand the data transfer process that occurs between Energy Solutions and the utilities and the important role that data files have in helping this Program successfully operate. As such, this resource begins with an overview of the data transfer process.

We hope you find this resource informative and useful in advancing your understanding of this Program. If you have any questions in your review, please reach out to Energy Solutions and we are happy to help. Contact information can be found on the last page of this guide.



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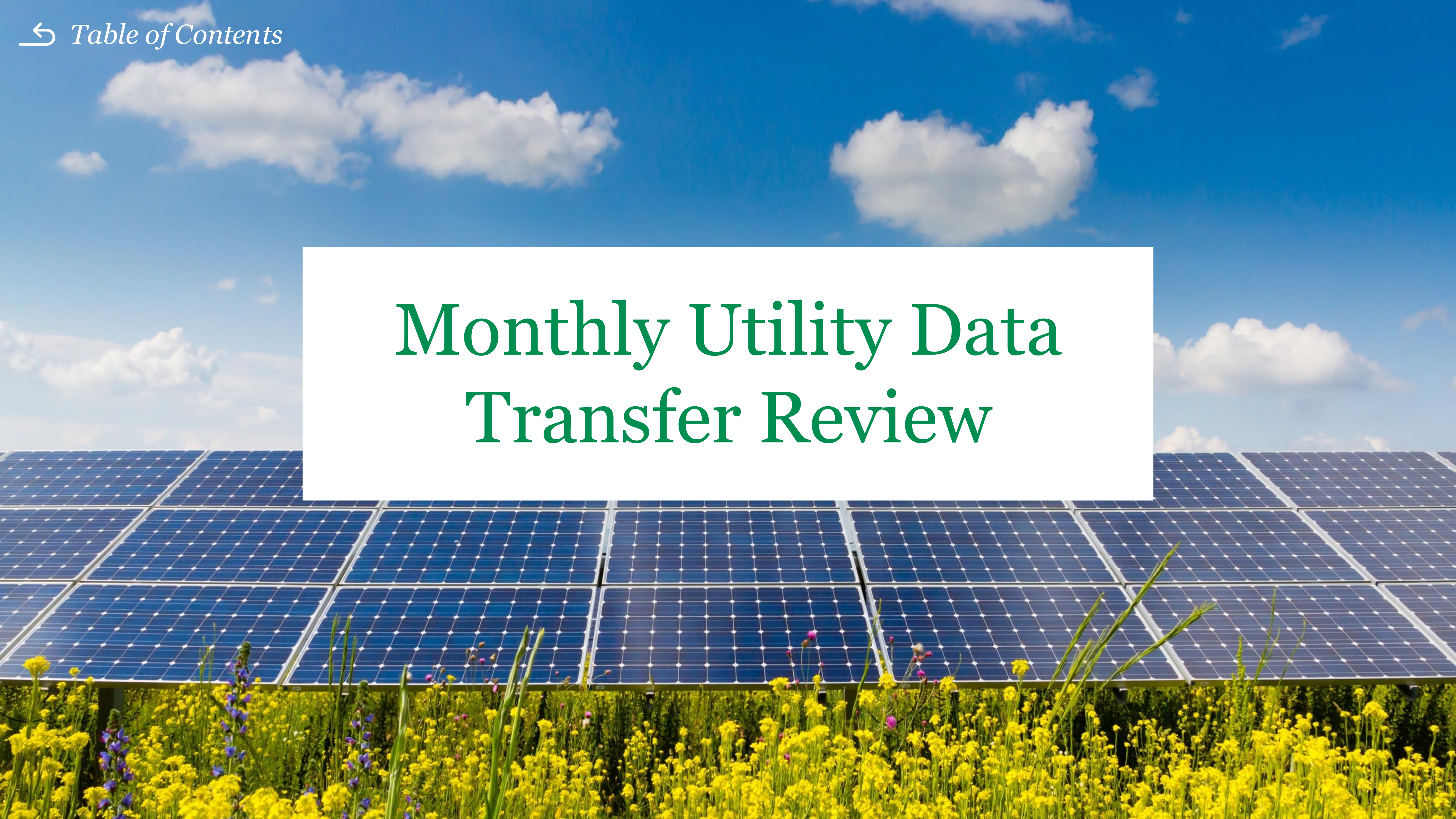

Monthly Utility Data Transfer Review

Data Transfer Overview

Energy Solutions and the Utilities (Portland General Electric, Pacific Power, and Idaho Power) process and share data transfer files containing participant and project information on an ongoing, monthly basis.

Collectively, these data transfer files ensure that:

- Participants receive community solar bill credits, subscription fees, and Program fees (if applicable) on their monthly utility bills; and
- Project managers receive payment for any energy produced through their project(s).

Every time a new data transfer file is processed, any data corresponding to that file will be updated in the platform. Energy Solutions will send out email notifications to project managers to help them track data updates in the platform and download any reports that project managers find necessary to their operations.

The data transfer overview section of this resource is intended to help ensure that project managers understand the information that is shared within each data transfer file, the cadence in which data transfer files are processed between Energy Solutions and the Utilities, and how each data transfer file informs the data within each platform tool.

Utility Data Exchange Transfer Overview

Information Provided **to Utilities** by Energy Solutions		
Data Transfer File Name	Date Processed	Primary Information Provided
Participant Subscription Status	1st and 15th of every month or next business day	Participant utility account information and status of program enrollment
Project Operational Status	1st and 15th of every month or next business day	Project utility account information and status
Participant Billing	5th business day of every month	Includes participant's attributed generation, bill credits, subscription fees, and Program fees (if applicable) for most recent generation period
Unsubscribed Generation	5th business day of every month	Unsubscribed generation (kWh) by project for most recent generation period, e.g., March unsubscribed generation file contains February unsubscribed generation data
Unbillable Energy	+1 business day after the participant subscription status file is sent to utility (sent on a quarterly basis)	Attributed generation (kWh) for rejected billing records of cancelled participants, by project, for most recent three generation periods

Utility Data Exchange Transfer Overview

Information Provided **to Energy Solutions** by the Utilities		
Data Transfer File Name	**Date Processed**	**Primary Information Provided**
Project Generation	2nd business day of every month	Project generation (kWh) for previous month, e.g., March generation file reports February generation data
Participant Status Confirmation	+5 business days after participant status file is sent to Utility	Confirmation of utility customer status, includes rejections for closed accounts or incorrect participant account data
Participant Billing Confirmation	+3 business days after participant billing file is sent to Utility	Confirmation of successful participant billing via a bill print date or participant bill print error flag, if billing record was rejected
Actual Participant Fee Collections	10th and 25th of every month or next business day	Participant fee collections. File received on the 10th shares collection data for days 16-EOM of the previous month. File received on the 25th shares collection data for days 1-15 of the same month.

Utility Data Exchange Transfer Overview (Contd)

Information Provided **to Energy Solutions** by the Utilities		
Data Transfer File Name	**Date Processed**	**Primary Information Provided**
Unsubscribed Power Purchase Cost	+10 business days after unsubscribed generation file is sent to Utility	As-available avoided cost rate (payment) for unsubscribed energy
Participant Consumption	By 12th calendar day of every month	Participant consumption data (kWh) for participants' most recent billing cycle
Unbillable Cost	+10 business days after unbillable energy is sent to utility (received on a quarterly basis)	As-available avoided cost rate (payment) for unbillable energy

Utility Data Exchange Calendar Example

Subject to change according to the month/year and cadence of files as shown in previous pages.

September 2023						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 Participant Subscription Status File; Project Operational File	2
3	4 Project Generation File	5	6	7 Participant Billing File; Unsubscribed Project Generation File	8 Participant Subscription Status Confirmation File	9
10	11 Participation Fee Collections File	12 Billing Confirmation File; Participant Consumption File	13	14	15 Participant Subscription Status File; Project Operational File	16
17	18	19	20	21 Unsubscribed Purchase Cost File	22 Participant Subscription Status Confirmation File	23
24	25 Participation Fee Collections File	26	27	28	29	30

Data from PA to Utilities

Data from Utilities to PA/Platform

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Unsubscribed Power Overview

Unsubscribed Power

Purpose: The unsubscribed power dashboard provides project managers with increased visibility into **how unsubscribed generation (kWh) is calculated and paid out for each project on a monthly basis.**

The dashboard displays:

- The total generation (kWh) for each project on a monthly basis
- The subscribed and unsubscribed capacity (kW) of each project in relation to the project's overall total capacity (kW).
- The amount a utility pays project managers for unsubscribed generation, referred to as unsubscribed cost or as-available avoided cost rate.
- The payment status and date paid for a given month's unsubscribed generation.

How is unsubscribed power calculated?

Every month, utilities send Energy Solutions a generation file which details the kWh generation of each project for the previous month. Energy Solutions calculates the percentage of a project that is unsubscribed by subtracting a project's subscribed capacity (based on the sum of participant's subscription sizes on the last calendar day of a month) from its total capacity and dividing the unsubscribed capacity by total capacity. That unsubscribed percentage is then multiplied by the project's total generation.

$$\left(\frac{\text{(Total capacity – subscribed capacity)}}{\text{Total capacity}}\right) \quad x \quad \text{Project generation}$$

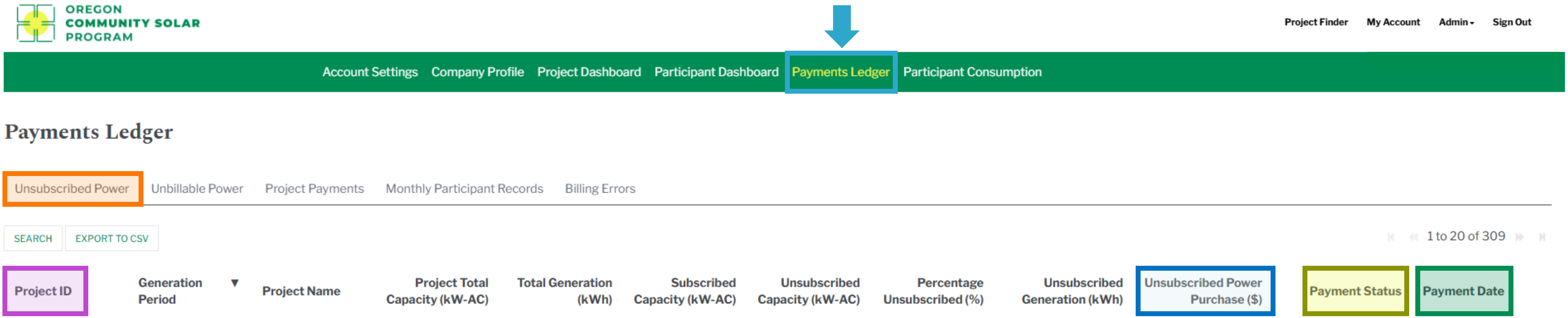
Example for a project with the following info:
1 month total generation: 100,000 kWh
Total project capacity: 2,000 kW
Subscribed capacity: 1,900kW

Unsubscribed percentage = 5%

$$\left(\frac{(2{,}000\text{ kW} - 1{,}900\text{ kW})}{2{,}000\text{ kW}}\right) \quad x \quad 100{,}000\text{ kWh} \quad = \quad \mathbf{5{,}000\text{ kWh}}$$

of unsubscribed power

Unsubscribed Power Dashboard



- The “Unsubscribed Power” dashboard is accessed via the main menu by clicking “Payments Ledger”.
- Columns “Project ID” through “Unsubscribed Power Purchase ($)” are populated when the unsubscribed generation file is processed every month.
- The “Unsubscribed Power Purchase ($)” field initially populates to $0.00 when the unsubscribed generation file is processed. This dollar value will be replaced with the actual unsubscribed power purchase value once received by the utility and imported to the platform (if unsubscribed kWh is greater than zero for given month). “Payment status” will also populate to “Pending” at this time.
- When the utility sends payment for the “Unsubscribed Power Purchase ($)”, Energy Solutions will send a notice of payment email to Project Managers and update the “Payment Status” field to “Paid” along with the “Payment Date”.
- The dashboard has **search**, **sort**, and **export to CSV** functionality.

Unbillable Power Overview

Unbillable Power

Purpose: The unbillable power dashboard provides project managers with increased visibility into **attributed generation that was never successfully billed for cancelled participants.**

The dashboard displays:

- The total generation (kWh) for each project on a monthly basis
- The unbillable capacity (kW) of each project in relation to the project's overall total capacity (kW).
- The amount a utility pays project managers for unbillable power; referred to as unbillable cost and payable at the same rate as unsubscribed generation.
- The payment status and date for a given month's unsubscribed generation.

How is unbillable power calculated?

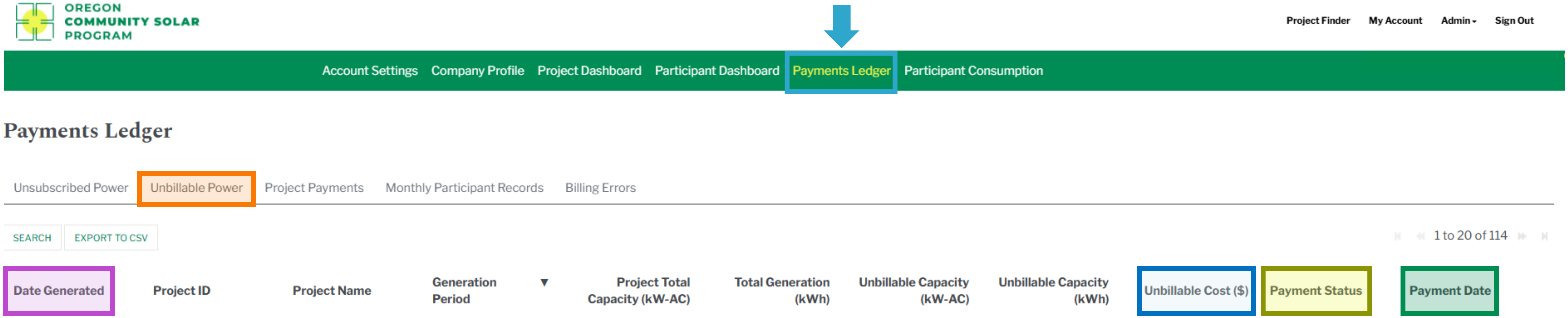
Every month, utilities send Energy Solutions a billing confirmation file which can include participant billing rejections. Energy Solutions will continue to include any rejected billing records in subsequent participant billing files so long as a participant is actively enrolled in the Program. Rejected billing records are no longer sent once a participant cancels their enrollment.

If a participant billing record is never accepted by the utility, the billing error is never resolved. The project manager is not paid for any subscription fees calculated from the attributed generation (kWh) because the billing record was never accepted, i.e., the fees were never printed on a participant's utility bill.

The unbillable power file is processed on a quarterly basis. It includes all attributed generation data that is never successfully billed and allocated to participants who cancelled their enrollment in the previous three months, i.e., since the last time the unbillable power file was processed. For this reason, Energy Solutions may send unbillable power data for the same project and generation period within different files.

Unbillable power is treated the same as unsubscribed generation in that utilities remit payment at the as-available avoided cost rate. Utilities have ten business days to send the unbillable cost file back to Energy Solutions.

Unbillable Power Dashboard



- The “Unbillable Power” dashboard is accessed via the main menu by clicking “Payments Ledger”.
- Columns “Date Generated” through “Unbillable Cost ($)” are populated when the unbillable power file is processed every month.
- The same generation period for the same project ID may be shown multiple times, depending on when participants with rejected billing records cancel their enrollment. “Date Generated” indicates when each unbillable power record row was sent to the utility.
- The “Unbillable Cost($)” field automatically initially populates to $0.00. This dollar value will be replaced with the actual unbillable cost value once received by the utility and imported to the platform. “Payment status” will also populate to “Pending” at this time.
- When the utility sends payment for the “Unbillable Cost($)”, Energy Solutions will send a notice of payment email to Project Managers and update the “Payment Status” field to “Paid” along with the “Payment Date”.
- The dashboard has **search**, **sort**, and **export to CSV** functionality.

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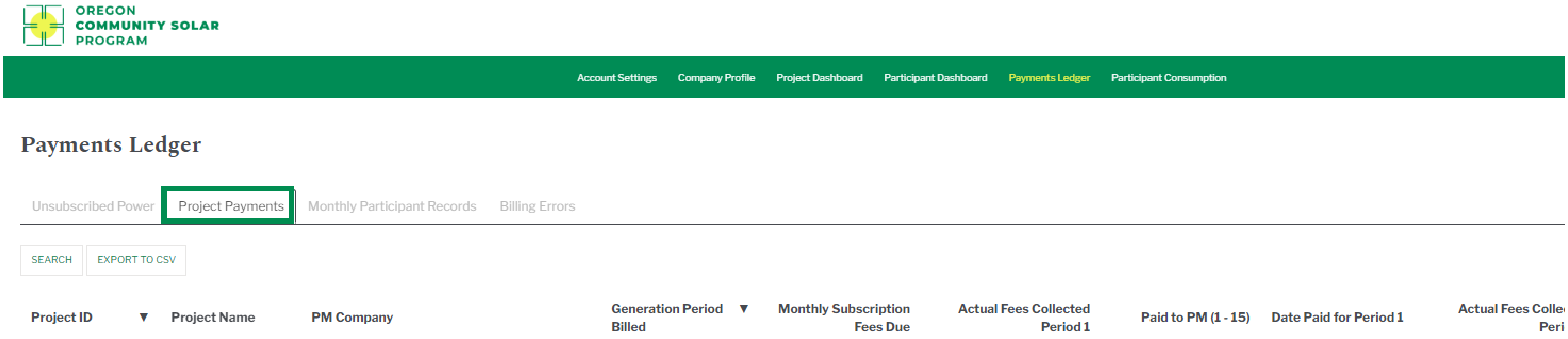
Project Payments Overview

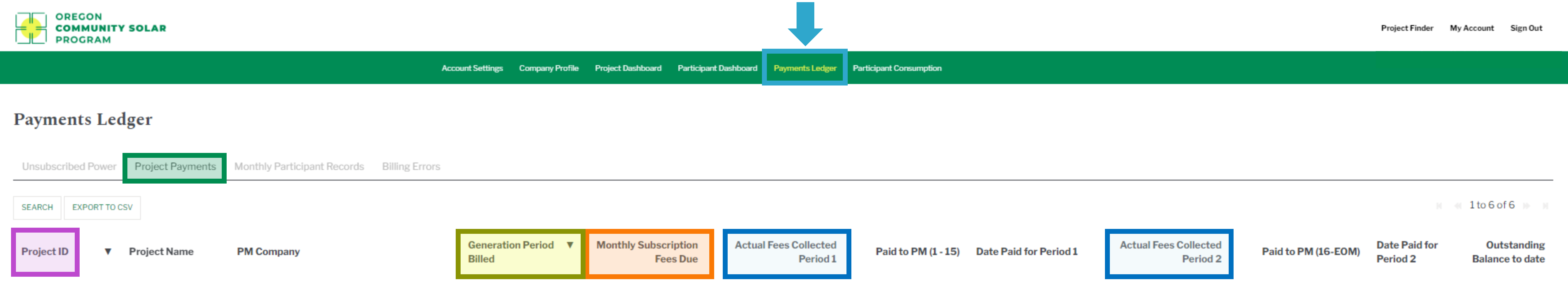
Project Payments

Purpose: The project payments dashboard shows project managers:

- The subscription fees owed for their project(s) on a monthly, ongoing basis.
- The amounts collected for each actual fees collected period
- The payment amount sent to project managers in relation to a specific fee collection period
- The date paid for subscription fee collections
- The outstanding balance relative to each operational project, which is regularly updated in accordance with subscription fees due and subscription fees paid

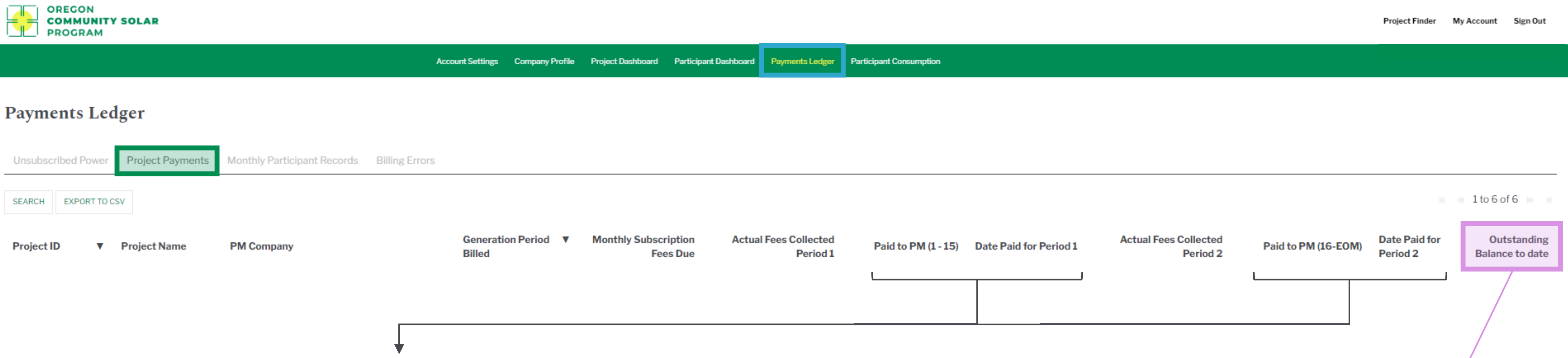


Project Payments Dashboard



- The "Project Payments" dashboard is accessed via the main menu by clicking "Payments Ledger"
- Dashboard has search, sort, and export to CSV functionality.
- Columns "Project ID" through "Monthly Subscription Fees Due" are populated when the participant billing file is processed.
- Column "Actual Fees Collected Period 1" displays fees collected between days 1-15
  Column "Actual Fees Collected Period 2" displays fees collected between days 16-EOM.
  Each column is populated when the corresponding actual participant fee collections file is processed.
  Note: These columns show fees collected in month that follows generation period billed, i.e., if "Generation Period Billed" is 3/2023, the fees collected shown in the same row will be for April 1–15 and April 16-30.
- When the utility sends payment for fees collected, Energy Solutions will send a notice of payment email to project managers for amount of subscription fees collected.

Project Payments Dashboard



When the utility sends payment for fees collected, Energy Solutions will send a notice of payment email to Project Managers for the subscription fees collected and will update the following columns in this dashboard:

- Paid to PM (1-15)
- Date Paid for Period 1
- Paid to PM (16-EOM)
- Date Paid for Period 2

Column "Outstanding Balance to Date" is updated anytime new monthly subscription fees due are added relative to the participant billing file and is also updated according to actual fees collected payments being sent to the project manager.

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Payment Ledger Overview

Project Payments

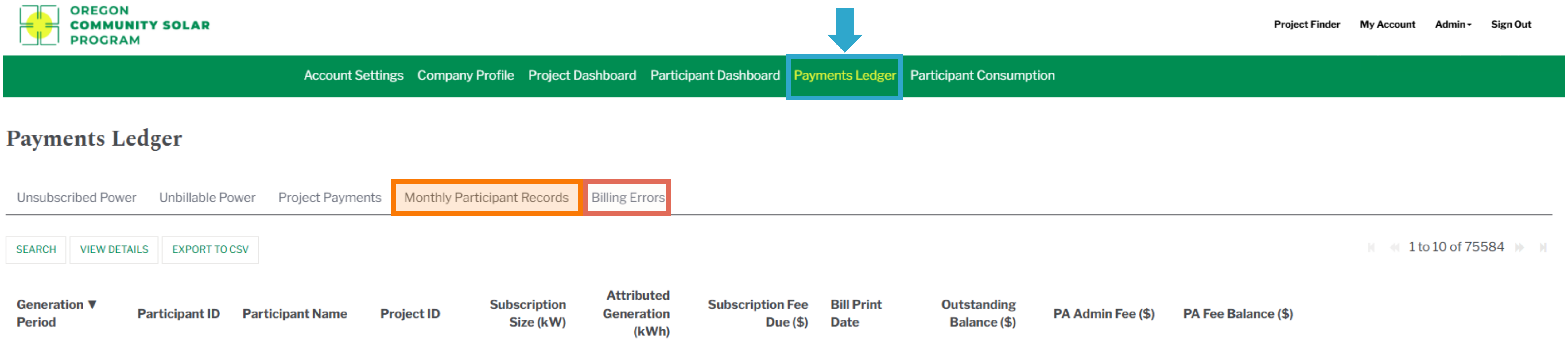
Purpose: The payment ledger or monthly participant records dashboard shows project managers participant billing data that is processed on a monthly, ongoing basis.

It provides access to billing information that allows project managers to track their participants:

- Subscription sizes
- Attributed generation
- Subscription & PA Fees due
- Subscription & PA Fees outstanding
- Bill print dates
- Bill print errors

Every time a new billing file is processed, additional data for that generation period will appear in the payment ledger.

Monthly Participant Records Dashboard



- The “Monthly Participant Records” dashboard is accessed via the main menu by clicking “Payments Ledger”.
- The dashboard contains all billing records for both active and inactive participants that have been accepted by the utility and all billing records for the most recent generation period, pending import of the participant billing confirmation file.
- Additionally, there is a “Billing Errors” dashboard next to the “Monthly Participant Records” header which contains all rejected participant billing records.
- Each dashboard has **search**, **sort**, and **export to CSV** functionality.

Monthly Participant Records: Participant Billing File

Payments Ledger

Unsubscribed Power | Unbillable Power | Project Payments | **Monthly Participant Records** | Billing Errors

SEARCH | VIEW DETAILS | EXPORT TO CSV

1 to 10 of 75584

Generation ▼ Period	Participant ID	Participant Name	Project ID	Subscription Size (kW)	Attributed Generation (kWh)	Subscription Fee Due ($)	Bill Print Date	Outstanding Balance ($)	PA Admin Fee ($)	PA Fee Balance ($)
04/2025	28919	NnQHevJxPJ	PGE-2020...	6.22	1302.426	147.51			0.00	
04/2025	28701	4UV3jHJ54V	PGE-2020...	1.33	278.493	31.54			0.00	
04/2025	28699	b40RkvvHkN	PGE-2020...	5.82	1218.669	138.03			0.00	
04/2025	28698	xzmrZ91UDo	PGE-2020...	1.30	272.211	30.83			0.00	

- The data in the columns highlighted above are populated every time a participant billing file is processed for a new generation period.
- Outstanding balances for new billing records are not updated until the participant billing confirmation file is imported to the platform.
- Project billing records are not shown in the payment ledger. Please reach out to Energy Solutions if you have questions about PA fees owed by the project manager.

Column "**PA Admin Fees**" will show an amount equal to $0.00 for all Low-Income or Low-Income Multifamily Housing participants. This is also true for all participants enrolled in a project wherein the project manager pays PA fees on behalf of non-low-income participants.

Monthly Participant Records: Billing Confirmation File

Payments Ledger

Unsubscribed Power | Unbillable Power | Project Payments | Monthly Participant Records | Billing Errors

SEARCH | VIEW DETAILS | EXPORT TO CSV

Generation ▲ Period	Participant ID	Participant Name	Project ID	Subscription Size (kW)	Attributed Generation (kWh)	Subscription Fee Due ($)	Bill Print Date	Outstanding Balance ($)	PA Admin Fee ($)	PA Fee Balance ($)
01/2023	3708	y7Oq6kAnUz	PGE-2020...	1.40	71.358	7.62	03/01/2023	0.00	0.00	0.00
01/2023	1367	ifTqfvavOl	PGE-2020...	19.90	1014.302	108.25	02/22/2023	0.00	0.00	0.00
01/2023	1072	0qfZXMyE4J	PGE-2020...	9.60	489.312	52.22	02/15/2023	0.00	0.00	0.00
01/2023	1351	IrsE7nvwx0	PGE-2020...	87.20	4444.580	474.33	02/14/2023	0.00	0.00	0.00

- Importing the billing confirmation file will update all participant billing records that were included in the most recent participant billing file, according to whether the record was **accepted** or **rejected**.
- If a participant billing record has been **accepted** by the utility, a "Bill Print Date" will appear for the participant and the "Outstanding Subscription Fee Balance" and "PA Fee Balances" will update according to the fees owed that period.
- If a participant billing record is **rejected** by the utility, the record for that participant will be moved to the "Billing Errors" header.

Monthly Participant Records: Billing Errors Dashboard

Payments Ledger

Unsubscribed Power | Project Payments | Monthly Participant Records | Billing Errors

SEARCH | VIEW DETAILS | EXPORT TO CSV

Gen Period	Participant ID	Participant Name	Project ID	Subscriptio Size (kWh)	Attributed Generation (kWh)	Subscription Fee Due ($)	Record update flag ▲	Rejection Reason	Rejection Count	Resent count
04/2021	71	EyAIJMMFeu	PGE-2020...	1.48	328.723	29.54	Confirmed	Account Closed	0	0
05/2021	79	VOiz7ahRTY	PGE-2020...	0.87	185.275	16.65	Confirmed	Account Closed	0	0
05/2021	248	SBNYPf5Tz9	PGE-2020...	30.13	6416.477	650.82	Confirmed	Account Closed	0	0
06/2021	1606	WqVlwrLZh1	PGE-2020...	2.98	737.101	74.55	Confirmed	ParticipantID No Match	0	0

Each record row in the "Billing Errors" header shows a "**Rejection Reason**":

- "**Account Closed**" means the participant no longer has an active account with the Utility.
- "**ParticipantID No Match**" means the utility account data is incorrect and needs to be updated.
- Please reach out to the PA team if you have questions about these rejection reasons.

If a participant billing record has been **rejected** and remains active when the following month's participant billing file is processed, Energy Solutions will continue to attempt to bill the customer for the previously rejected generation period(s).

If a participant is **accepted** in a subsequent participant billing confirmation file, that billing record will move back to the monthly participant records dashboard and will no longer be found in the "Billing Errors" header.

Monthly Participant Records: Actual Fees Collected

- When the actual fees collected file is imported into the platform, any reported collections are deducted from the total outstanding balance owed by a participant. The difference in the outstanding balance before and after import reflects the payment reported in the actual fees collected file.
- Dollars collected are always applied to the **oldest generation period with an outstanding balance** until all collected dollars are applied. The following payment hierarchy dictates how payment is applied to a participant's account:

Payment $

1. Oldest generation period with an outstanding PA fee balance
2. Oldest generation period with an outstanding subscription fee balance
3. Current generation period with an outstanding PA fee balance
4. Current generation period with an outstanding subscription fee balance

The following page will demonstrate how a participant record will appear before and after fees collected are applied within the payment ledger.

Any low-income participant enrolled in the Program OR participant enrolled in a project wherein the project manager pays Program Administrative fees on behalf of non-low-income participants will never pay PA admin fees in the Program. Therefore, these participants will never have an outstanding PA fee balance. In these cases, dollars collected are applied solely to the outstanding balance for subscription fees due (oldest to newest).

Participant Payment Example

- Participant ID 15 has an Outstanding Subscription Fee Balance of $16.86 for generation period January 2023. This participant does not pay PA admin fees and therefore does not have an Outstanding PA Fee Balance.
- Energy Solutions imports a fee collections file showing that participant ID has paid $16.86 for the fee collection period of 3/01/2023 – 3/15/2023.

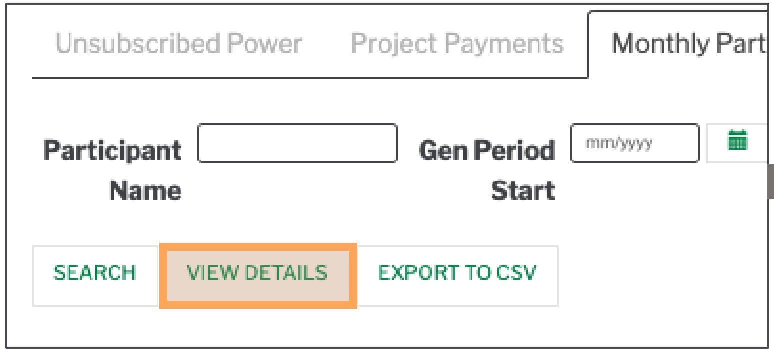
Generation ▼ Period	Participant ID	Participant Name	Project ID	Subscrip Size (kW)	Attributed Generation (kWh)	Subscription Fee Due ($)	Bill Print Date	Outstanding Balance ($)	PA Admin Fee ($)	PA Fee Balance ($)
02/2023	15	[redacted]		2.80	113.366	12.10	04/04/2023	28.96	0.00	0.00
01/2023	15			2.80	157.978	16.86	03/06/2023	16.86	0.00	0.00

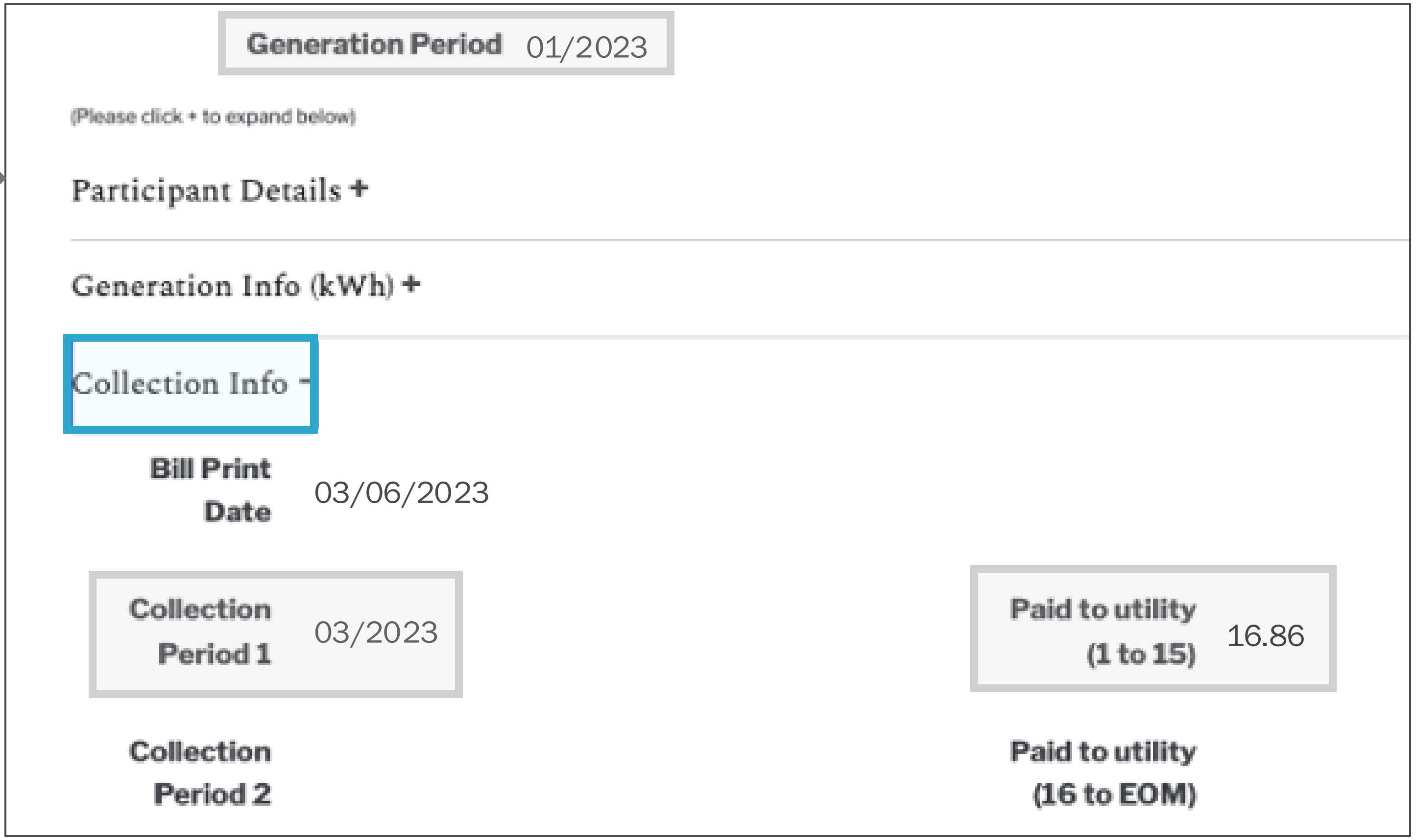
- After applying the payment for this collection period, this participant no longer has an outstanding balance in January and the outstanding balance in February is $12.10 which reflects the recently applied payment.

Generation ▼ Period	Participa ▲ ID	Participant Name	Project ID	Subscrip Size (kW)	Attributed Generation (kWh)	Subscription Fee Due ($)	Bill Print Date	Outstanding Balance ($)	PA Admin Fee ($)	PA Fee Balance ($)
02/2023	15	[redacted]		2.80	113.366	12.10	04/04/2023	12.10	0.00	0.00
01/2023	15			2.80	157.978	16.86	03/06/2023	0.00	0.00	0.00

Monthly Participant Records: View Dollars Applied

Click on the View Details button and open "Collection Info" to see dollars applied.





Payment Ledger Summary

- The ledger is dynamically updated as information flows between the PA and the Utilities. It provides a regulated and timely update of information.
- Energy Solutions will reach out to project managers anytime a new data transfer file is processed and new data is available in the platform.
- The “Collection History” column displays all historical subscription fee payment data and is never overwritten.
- It is strongly recommended that project managers download both the “Active Participants” and “Non-Active Participants” csv files anytime a fee collection payment has been applied to the payment ledger, i.e., 2x/month.
- Project managers can request historical data files from Energy Solutions if old data becomes unavailable as a result of newer data being available, i.e., fee collection data is overwritten in collection period columns due to partial payments.
- Billing Errors are **not** included in Outstanding Balances Due.

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Participant Consumption Overview

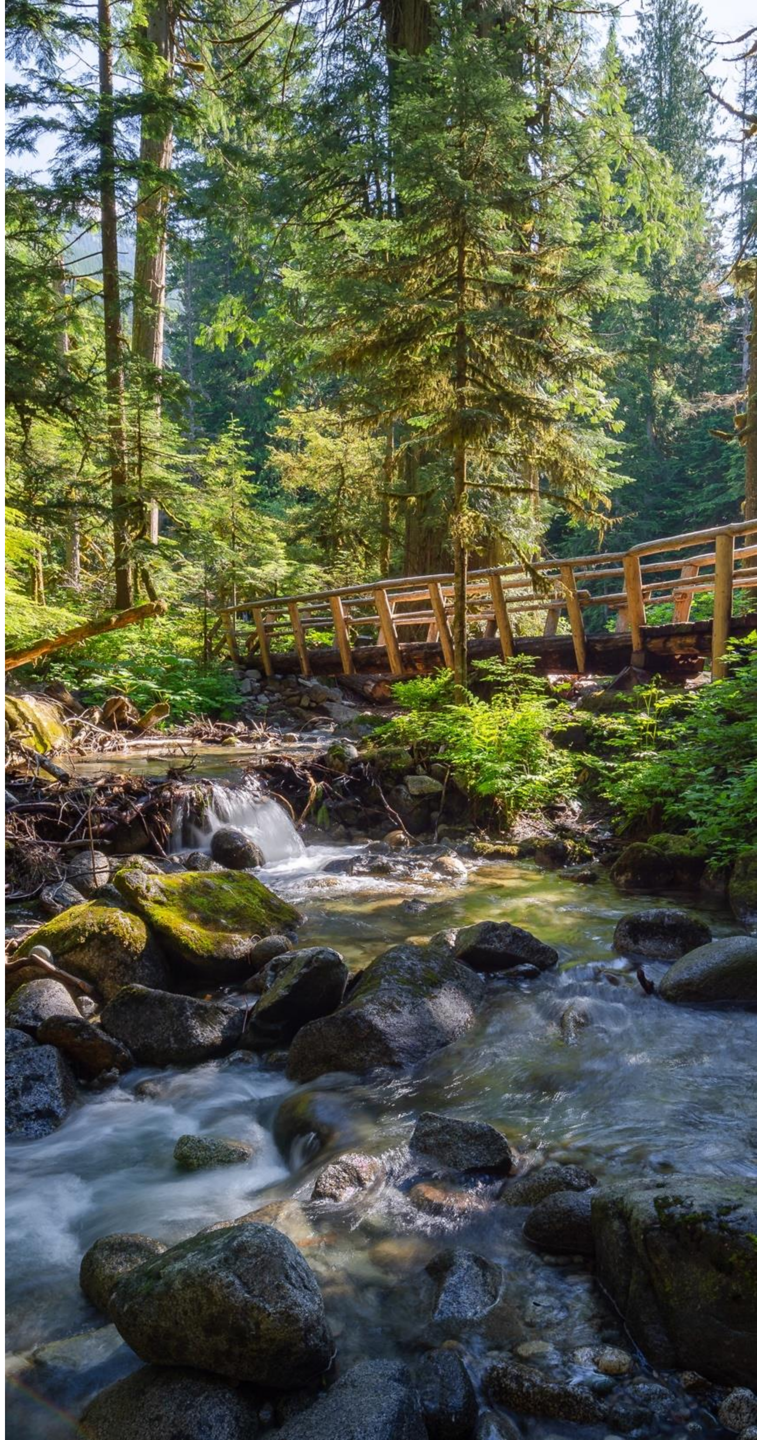
Participant Consumption

Purpose: There are multiple participant consumption dashboards that can provide consumption (kWh) data for actively enrolled participants of the Program. This data helps project managers understand which customers are subject to the annual reconciliation review and which customers are at-risk of oversubscription.

What is the annual reconciliation review?

Every year, a reconciliation review is conducted for all active Program participants that have been enrolled in the Program for a full year. Participants are included in the review if they were actively billed beginning April 1st of the previous year through March 31st of the current year. Participants who have not been actively billed for a full year are not subject to the annual overconsumption review, even if they are oversubscribed.

The reconciliation review typically occurs in June when a full year of generation and consumption data is available. If the review finds that a participant's subscription has produced generation (kWh) that is higher than their consumption (kWh) in the past year, the participant will need to repay the bill credit value received for the oversubscribed kWh. The method of repayment is subject to a participant's customer type in the Program. Please see the next two pages for further explanation.



Annual Reconciliation Review

Non-Low-Income Participants

Any non-low-income participant (Residential, Small Commercial, and Large Commercial customer type) that is both subject to the annual reconciliation review and oversubscribed will owe a one-time fee on their utility bill.

The one-time fee is included in the monthly participant billing file sent to utilities following the annual oversubscription review (typically occurs in June) and shows up on the next utility bill received by the participant.

More information about the annual reconciliation review can be found in the Program Implementation Manual, Section 6.3.6 Annual Bill Credit Reconciliation.

Example:

Annual Participant Generation: 5,000 kWh

Annual Participant Consumption: 4,800 kWh

→

Total Overconsumption: 200 kWh

→

200kWh * Utility Bill Credit Rate

=

One-time fee

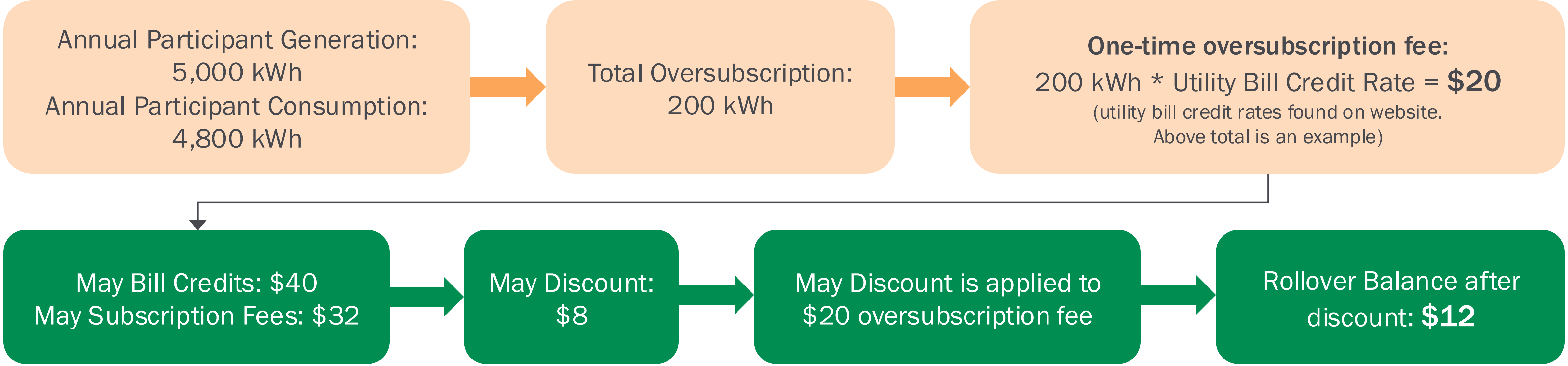
(utility bill credit rates found on website)

Annual Reconciliation Review

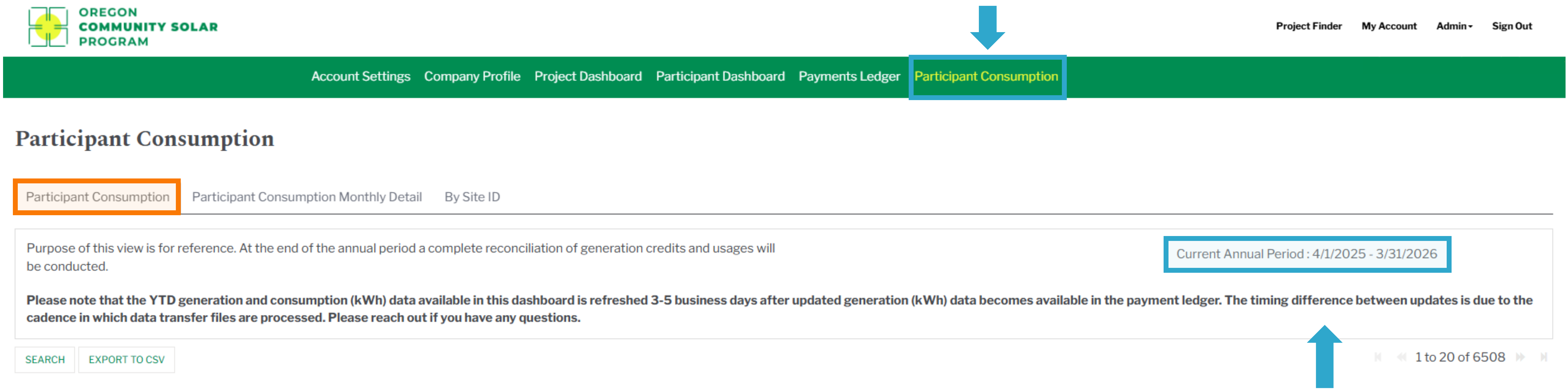
Low-Income Participants

Any low-income participant, i.e., Low-Income and Low-Income Multifamily Housing customer types, that is both subject to the annual reconciliation review and oversubscribed will owe an initial fee that **does not exceed their monthly discount or the difference between their monthly bill credits and subscription fees**. Any balance that exceeds the discount rolls over to the next month's bill until the full fee amount is recouped.

Example:



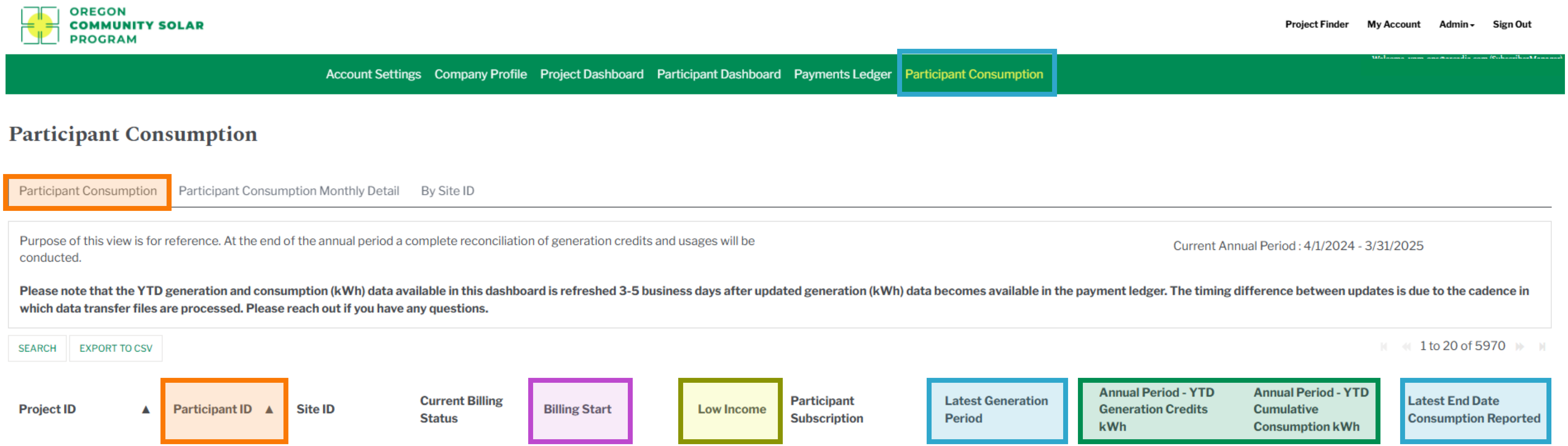
Participant Consumption Dashboard



- The "Participant Consumption" dashboard is accessed via the main menu by clicking "Participant Consumption".
- Reference the "Participant Consumption" dashboard for any participant(s) that are enrolled no more than one time in the Program during the current annual period, i.e., they do not share a site ID with any other participant ID that has been active **at any time** during the current annual period.
- Columns are updated when the participant billing confirmation files is processed every month.
- The dashboard has **search**, **sort**, and **export to CSV** functionality.

The Current Annual Period is always April 1 to March 31 of the following year.

Participant Consumption Dashboard



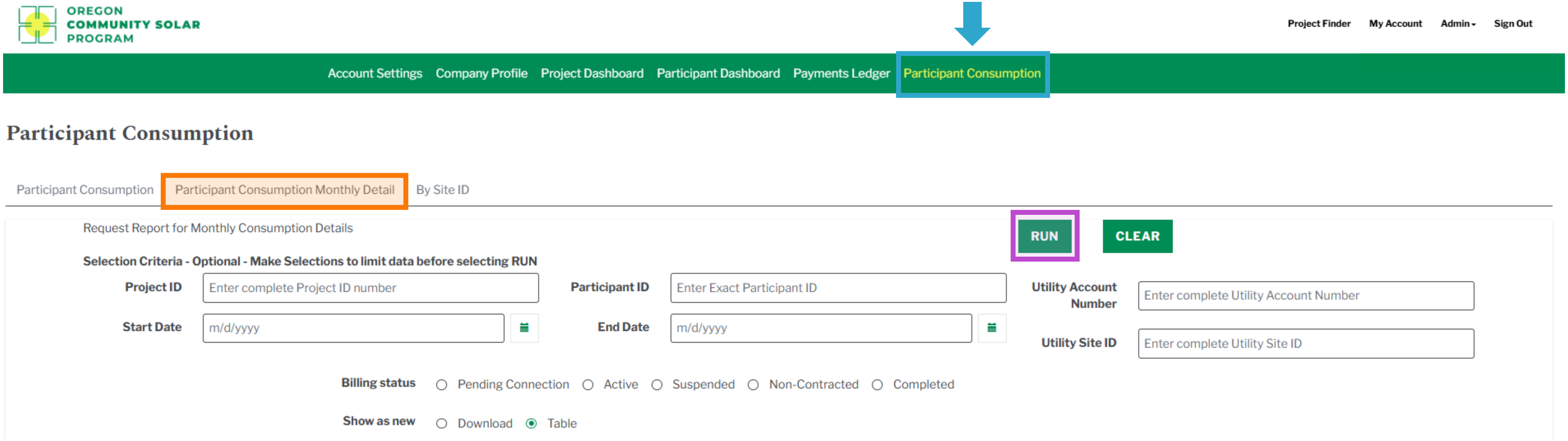
The “Billing Start” displays the first generation period that was successfully billed for the “Participant ID”.

The “Low Income” shows whether a participant is designated low-income or not (Y/N). The implications of a participant’s customer type as it relates to the annual oversubscription review is explained earlier in this section.

The YTD Generation and Consumption (kWh) totals show cumulative data for the current annual period.

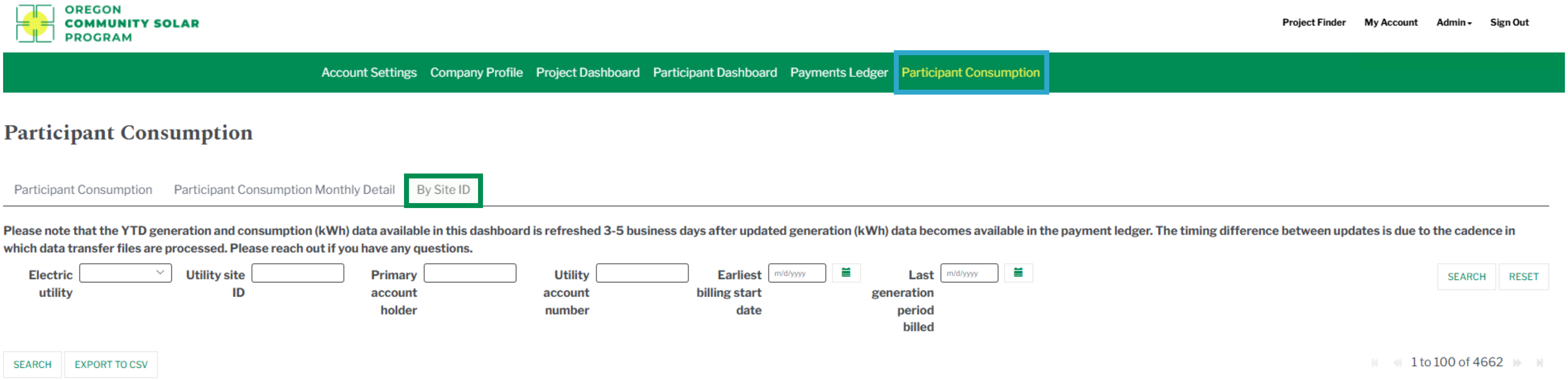
The “Latest Generation Period” and “Latest End Date Consumption Reported” can help determine the number of days included within the generation and consumption totals shown for the current annual period. Tracking the average consumption vs. generation (kWh) per day can be a helpful way to understand whether a participant is at risk of oversubscription.

Participant Consumption Monthly Detail



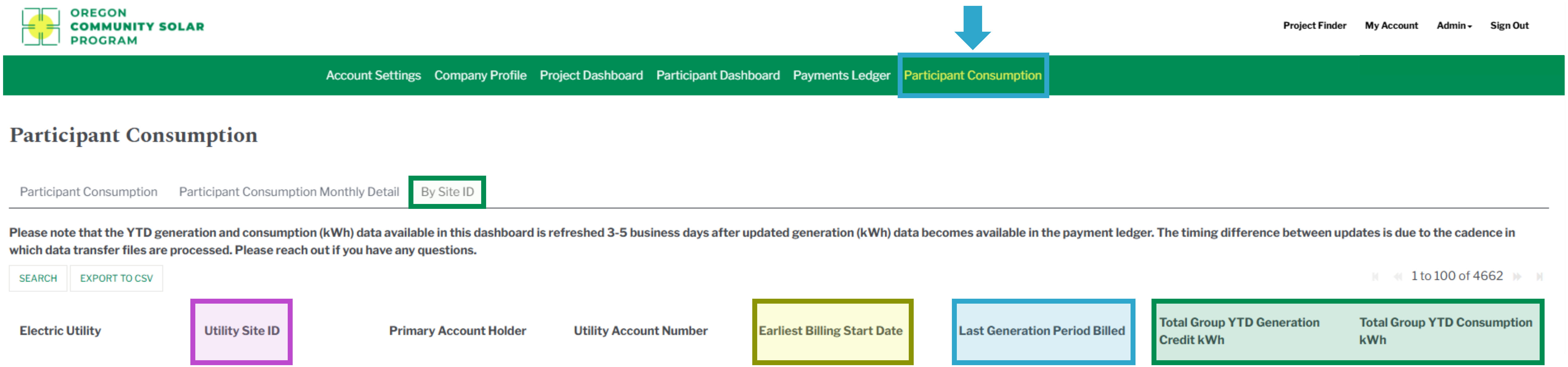
- The "Participant Consumption Monthly Detail" tool is accessed via the main menu by clicking "Participant Consumption".
- The "Participant Consumption Monthly Detail" tool can be used to view and/or download consumption data based on the selection criteria entered by the user and clicking "Run".
- New consumption data will become available once the participant consumption file is processed every month.

Participant Consumption – By Site ID Dashboard



- The “By Site ID” dashboard is accessed via the main menu by clicking “Participant Consumption”.
- Reference the “By Site ID” dashboard if multiple participant IDs, sharing a common site ID (i.e., a site address), have been enrolled during the current annual period. Multiple enrollments located the same site address are considered the same participant. The same participant account holder at different site addresses is not considered the same participant.
- Columns are updated when the participant billing confirmation files is processed every month.
- The dashboard has **search**, **sort**, and **export to CSV** functionality.

Participant Consumption – By Site ID Dashboard



The "Earliest Billing Start Date" column displays the first generation period successfully billed for any participant ID sharing a common "Utility Site ID".

The "Last Generation Period Billed" column displays the most recent generation period successfully billed for any participant ID sharing a common "Utility Site ID".

The YTD Generation and Consumption (kWh) totals show cumulative data for all participant IDs sharing a common "Site ID" for the current annual period.

Project Enrollment Overview

Project Enrollment

Purpose: The project enrollment tool shows both the sum and percentage of subscription capacity that is filled by each customer type enrolled in a project relative to its overall capacity. This data helps project managers understand whether their project(s) comply with project enrollment mix requirements as established by Program rules.

Tier 1 Program Enrollment Rules	• No more than 50% of a project's capacity can be allocated to large commercial participants. • A customer may not subscribe to more than 2 MW - AC across all utilities
Tier 2 Program Enrollment Rules	• At least 5% of project capacity must be allocated to residential low-income participants (resident holds the utility account). • No more than 50% of project capacity can be allocated to non-residential participants (includes small and large commercial customer types).
Both Tier 1 & 2 Program Enrollment Rules[1]	• Every project must allocate a minimum of 10% of project capacity to low-income participants. • A single participant cannot be subscribed to more than 40% of a project's capacity. • A customer and its affiliates may subscribe to no more than 4 MW – AC across all utilities

[1]Additional project enrollment mix requirements may apply to carve-out projects depending on their eligibility requirements.

Project Enrollment Mix

Application Documentation Submit Administration Participants Notes History **Enrollment**

PROJECT ENROLLMENT

Project Capacity (kW-AC): 2500

Customer Type	Sum of Verified Subscriptions (kW-AC)	Includes Pending Changes kW-AC	Percent of Project Capacity	Percent of Project Includes Pending Capacity
Low-Income	250.00	0.00	10%	0.00 %
Low-Income MultiFamily Housing	0.00	0.00	0%	0.00 %
Residential	503.69	0.00	20.15%	0.00 %
Total Residential	753.69	753.69	30.15%	30.15 %
Small Commercial	496.31	0.00	19.85%	0.00 %
Large Commercial	1250.00	0.00	50%	0.00 %
Total Non-Residential	1746.31	1746.31	69.85%	69.85 %
Total Verified Subscriptions	2500.00	2500.00	100%	100.00 %

The project enrollment mix dashboard is accessed by clicking on "**Project Dashboard**" in the main menu ribbon, clicking on a project's name from the available list, and clicking "**Enrollment**".

This view shows the "**Sum of Verified Subscriptions (kW-AC)**" per customer type and sector (residential and non-residential) and the "**Percent of Project Capacity**" allocated to each customer type and sector relative to a project's overall capacity.

It also includes any **pending subscription size changes (kW-AC)** that are set to take effect in any future generation period, along with the percent for any **pending subscription size changes**.

The data in this dashboard is dynamically updated anytime a new participant is verified, a subscription size change occurs, or a participant is cancelled from a project.

Thank You!

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PROGRAM

Please reach out to Energy Solutions staff or the general administration email if you have any questions or need additional help regarding the content of this resource.

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