This document is intended to provide Project Managers (PMs) with guidance on the steps required for a pre-certified project to apply for project certification in the Oregon Community Solar Program (Program).

Information Required

The following information requires documentation that must be submitted through the Program's platform as part of the certification application. The Program Administration team (PA) will use this information to verify that a project meets the Program requirements before a project recommendation is shared with the Commission.

Project Managers should review Chapter 3: Requirements and Chapter 5: Project Certification in the Program Implementation Manual to evaluate the full list of certification expectations.

When to Request Certification

Project Managers may request certification for a project once it is within six months of achieving commercial operations. Project Managers are advised to request certification at least one month prior to a project's anticipated operational start date. This provides time for the PA to review the project's documentation and time for the project to be added to the agenda for a future Oregon Public Utility Commission meeting. If the project's certification deadline is not within 6 months of the Commercial Operation date, the PM should request a certification extension via a written request. Review section 4.7, Project Amendment, of the Program Implementation Manual (PIM) on how to submit an extension request.

Required Documents

Project Managers must provide the following documentation to a project's profile within the Program platform prior to requesting certification:

☐ *Community Solar Power Purchase Agreement*
  Upload an executed utility Community Solar Power Purchase Agreement (PPA) to the Documentation tab. If the registered Project Manager company is not the signee of the PPA, the PA will provide an attestation form that must be filled out attesting that the signee is managing the project with the knowledge and consent of the project owner must be submitted to the PA team.

Community Solar Project Information

Draft-146

Tier

Application	Documentation	Administration	Participants	Notes	History	Enrollment

☐ *Construction Drawings*

Upload the final construction drawings to the Documentation tab. The drawings should align with details provided at pre-certification or amendments approved via a pre-certification amendment. The only changes that allow a project to continue with certification without a pre-certification amendment are the following:

- A reduction of less than 200 kW in AC nameplate capacity
- Changes to equipment or DC nameplate capacity of the project that are consistent with the Program's installation requirements, if the AC nameplate remains unchanged
- For a project spread across multiple aggregated sites, changes to the equipment or nameplate capacities of segments or removal of a site where the total capacity of the Project does not change (e.g., this would allow a Project that consists of three 100-kW systems at sites A, B and C to change to two 150-kW systems at sites A and B but would not allow the addition of a site D).

See PIM Section 4.7 Project Amendments for more details on revisions to pre-certified projects.

☐ *Signed Interconnection Agreement*

Upload the most recently executed Interconnection Agreement to the Documentation tab.

Application Updates

The project's application should be reviewed and updated where needed. Below are the sections the PA will review to ensure they are updated.

☐ *Final Project cost information*

All estimated costs entered prior to pre-certification must be updated to reflect final project costs in the Expected Project Costs section of the Application tab. Any additional costs that do not apply to the categories listed can be added by clicking the Edit button followed by the Add More button. Defined cost categories include:

- Equipment costs
- Engineering, procurement, and construction costs (excluding equipment)
- Development costs
- Customer acquisition costs (estimated)
- Participant management costs, annualized (estimated)
- Operation and Maintenance (O&M), annualized (estimated)
- Other (describe)

☐ *Final Project Dates*

The status of utility interconnection upgrades and inspection, and all "Achieved Dates" for project milestones must be added to the section of the Project Development Timeline fields of the Program platform. The commercial operations date is the specific date that participants will begin to be credited for subscribed project generation.

This date must be on or after the agreed-upon commercial operations date in the PPA and within six months of the date that project certification is requested. The "Project Certification" achieved date should reflect the date the PM is requesting certification from the PA team.

☐ *Subscription Fees*

The PM must review the subscription fee pricing for all relevant customer types to ensure accuracy. Subscription fee rates for Tier 2 projects cannot be adjusted once a project becomes operational. For Tier 2 projects, bill credits escalate by 2% each year. Review the Tier 2 Billing Rules Guide on the Program website to review the bill credit rates that are in effect at the time that the project becomes operational and adjust your subscription prices, as needed. Note, low-income subscription fees must be priced to provide a subscription discount of at least 20 percent compared to the bill credit rate for Tier 1 projects and at least 40 percent for Tier 2 projects.

PA Provided Documents

Once a PM requests certification for their project, the PA will provide additional forms for the PM to review, fill out, and send back as relevant. Below is the list of forms the PA will send.

☐ *Attestation of Project Management Authority (As needed)*

If the PM is not the signatory of the Community Solar Power Purchase Agreement, a written document attesting that it is managing the project with the knowledge and consent of the project owner must be provided.

☐ *Attestation of Commercial Operations Schedule*

The PM must provide an attestation confirming that the project is scheduled to begin commercial operations within six months of the date of certification.

☐ *Alternative Administrative fee*

The PM must fill out and sign the Alternative Administrative Fee form to confirm if the PM will pay the program's administrative fee on behalf of participants.

☐ *Non-Disclosure Agreement (Only PGE Project)*

Projects in PGE's territory will need to sign an NDA. Energy Solutions will send the required documents to the PM if the PM has not signed an NDA.

Participant Verification

☐ *Participant Eligibility requirements*

As described in Chapter 3: Requirements in the PIM, the Program Administrator will verify the following items in order to approve the project for certification:

- There are 5 or more Participants
- At least 50% of the Project's capacity is subscribed
- No single Participant owns or leases over 40% of the capacity of the Project
- In the Interim Offering: No more than 50% of the Project's capacity is owned or leased by large commercial, industrial, or irrigation Participants
- In the Second Offering: No more than 50% of the Project's capacity is owned or leased by non-residential Participants.
- A minimum of 10% of the capacity of the Project is owned or leased by low-income Participants

Verification status check

Prior to requesting certification, the PM should ensure that all participants assigned to the project have been submitted for verification and sized appropriately for their subscriptions by reviewing the "contract status" of Participants in the Participant Dashboard of the platform. Ensure that any completed Participant profile with a signed contract is submitted to "PA Review" status for verification. Project Managers should anticipate that verification by the Program Administrators may take up to 1-2 weeks, depending on volume, and are encouraged to submit participants for verification as soon as possible and before requesting certification to avoid delays.

Full Project Review

Please verify the following:

- Any submitted waivers have been approved by the Program Administration team prior to requesting certification.
- Any additional contractors, affiliates, or partners added since pre-certification are listed on the project application.
- Review the Project Manager profile to ensure that all information is up to date.
- Note that after project certification, the project application cannot be edited, so any changes should be made prior to requesting certification.
- The Project Finder information for the project is up to date, including whether the project is actively enrolling participants.

Payee Information

Complete the Payee Information section in the project application. This information is used by the Program Administration team for payment-related communications. The contact details are not required to match the information for the registered Project Manager. There are two options for payment types:

- ACH
  - If ACH is selected, an auto-generated ACH form will be sent to the registered Program Manager's email after certification has been requested that should be filled out and emailed to the Program Administrator per the instructions on the form.
  - The Payee Vendor Name, Payee Title, Payee Phone Number, and Payee Email should also be completed in the Platform.
- Check
  - If a mailed check option is selected, the Payee Full Name (individual's name on the account), Payee title, Payee Vendor Name (business name that the checks will be made to), Payee Phone Number, Payee Email are all required fields.

If there are any specific questions on payments, please reach out to the Program Administrator.

Submitting the Project for Certification

Once the Project Manager is confident that all the above items are complete, the Project Manager can request certification by navigating to the Submit tab, checking the box to confirm the project has met all certification requirements, and clicking the Submit Certification Documents button as shown below.

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

Click below to submit your application. Your application will not be reviewed until your application is submitted.

PRE-CERTIFICATION (6 MONTH UPDATE) DOCUMENTS

Click below to submit your application. Your application will not be reviewed until your application is submitted.

☐ * *Check the box to confirm that you meet the following certification requirements:*
- *The legal owner of this project has signed a Community Solar-specific Power Purchase Agreement with the relevant utility.*
- *This project has obtained all permits and passed all inspections required by state and local authorities.*
- *This project has been fully constructed.*
- *This project is expected to begin commercial operations within six months.*

SUBMIT CERTIFICATION DOCUMENTS

Please note that you may also see a button to submit the project for its six- or twelve-month pre-certification review on the Submit tab. This documentation is due six and twelve months after pre-certification is achieved. You may disregard this button if you are ready to request certification before the six and/or twelve-month mark. Otherwise, submit the six- or twelve-month project update document in the Documentation tab, submit the project for review, and reach out to the PA to confirm these steps have been completed.

Timing

The PA reviews certification requests on a rolling basis and will send a project certification recommendation to the Oregon Public Utility Commission once all certification requirements have been met. The Commission, at its sole discretion, will consider and certify the project at a scheduled public meeting. PMs should expect the review and approval process to take at least one month in normal circumstances and should time their activities accordingly. A project may take longer if any issues must be addressed.

The Project Manager will receive a certification notice once their project is approved by the Commission and can subsequently proceed with submitting the project for commercial operations. Please refer to the "**Expectations for Project Operations**" guide for the next steps to start participant billing.