

CCSE CSI Interim PBI Process

Interim Criterion for Submitting Production Data

- The Performance Data Provider (PDP) must be an eligible PMRS provider listed on the CEC's website: (<http://www.consumerenergycenter.org/erprebate/monitors+rsp.html>)
- The PDP must receive authorization from the PA (PA) prior to submitting Performance Based Incentive (PBI) Data Reports for customer incentive payments. The customer is responsible for contracting with an approved PDP. The PDP will provide actual production data from the customer-owned generation to the PA for determining monthly PBI payments. Any delay in delivery of the data report to the PA may result in the incentive payment being delayed.
- The PA will not pay incentives based on estimated data supplied by the PDP, nor will the PA estimate incentive payments in the absence of actual performance data.
- The PDP must submit performance data using the attached CSI PBI Data Report Worksheet.

PDP Notification of Incentive Approval for PBI Reservations

Once the PBI project is approved for payment, CCSE will copy the PDP on the final approval correspondence to the Host Customer and System Owner. That letter will indicate what Payment Cycle the reservation has been assigned as well as the start date of the first data report. A new Excel PBI Data Report file for a project that is approved for payment will be emailed to the corresponding PDP, partially filled with the pertinent contact and reservation information along with notification of the corresponding Payment Cycle and start date of the first report period.

Monthly PBI Data Report Transmission

A PBI data report must be received by the appropriate PA for a project no later than close of business (COB) five days following the end of the reporting period. This equates to COB the fifth or twentieth of each month depending on the customers PBI payment cycle. As per Section 4.4.5.2 of the CSI Handbook, the PA has 30 days from the end of the PBI data report period to provide payment. The PDP is responsible for providing monthly system performance data to CCSE via our approved Excel PBI Data Report spreadsheet via email per the PA established payment cycle. A response e-mail will be sent by the PA to confirm receipt of the PBI data report. CCSE has set up two distinct email address for the separate Payment Cycles:

- pbi1@energycenter.org for Payment Cycle 1
 - 12:00AM on the 1st of the month through the 12:00AM on the 1st of the following month
- pbi2@energycenter.org for Payment Cycle 2
 - 12:00AM on the 16th of the month through the 12:00AM on the 16th of the following month

CCSE has specific personnel managing each Payment Cycle and any issues with a specific project or payment can be addressed by the CCSE PBI Payment Team. Should a PDP be unable to transmit a data report due to communication issues, we will pay out during the following cycle (double pay) contingent upon receipt of the missing data. The PDP is responsible for immediately notifying CCSE of any issues they are/will have with transmitting the PBI Data Report. CCSE will only pay incentives on actual performance data.

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PBI Data Report Description

Each month of production data submitted for payment must be provided on its own PBI Data Report. More than one month worth of data on a single report will not be accepted. In cases where a prior report needs revision, the PDP must resubmit the prior report with the updated fields and a short explanation as to why the report needed to be revised. The yellow fields in the CSI PBI Data Reporting Worksheet that require input by the PDP are described below:

- A. **Project Info** – this section identifies all the project details for the PA to confirm which project and month to which production data and payment will be assigned. It also includes the contact information of the PDP in the event the PA identifies a problem with the PBI data report. The PA will pre-fill the reservation and contact information for each project.
 - a. **Data Report Number** – this is the effective report number out of the scheduled 60 payments. This number must be updated by the PDP prior to submitting each report.
 - b. **Primary/Secondary Incentive Level** – for projects that are approved to receive incentives from two incentive levels OR projects that are prorated due to size or project cost restrictions, the splits established by the PA and reported on the incentive claim approval letter will be entered here by the PA.
- B. **Production Report** – this section contains all the pertinent reporting information for the PBI reporting period.
 - a. **Meter Blocks** – The blocks numbered from one to four represent the fields available for each potential meter of the specified project. Most projects will only fill out the first block corresponding to a single performance meter onsite. If the specified Project ID has more than one performance meter associated with it, use the additional blocks as needed. Please contact your PA if more than four blocks are needed. This section must be populated by the PDP.
 - b. **Utility and Meter Information** – Input the utility account number that corresponds to the approved PBI meter. Input the utility assigned PBI meter number. If no utility PBI meter number was provided, input the meter's serial number and preface the serial number with an "SN". For example, SN013257. This section must be populated by the PDP.
 - c. **Start/End Read and Cumulative kWh** – These numbers indicate the cumulative count of the total kWh production of the generation system. This is NOT the 15-min kWh production read. The End Read of each PBI data report should be the same as the Start Read of the following period.
- C. **Optional 15-minute Data Report** – the second tab on the spreadsheet is available for PDPs to provide the full log of 15-min interval kWh production data to the PA if possible. The PA will require PDPs to submit all historical 15-minute interval data that was not reported during the interim PBI payment process period using the EDI 867 protocol. Therefore, PDPs are strongly encouraged to provide this data during the interim period.
 - a. **15-minute kWh Read** – this data must be actual production including any meter multipliers. Do not provide raw data that has been processed without applicable meter multipliers.
 - b. **Timestamp** – each 15-minute read must also be accompanied by a corresponding date and timestamp, each in separate columns adjacent to the data read. The date stamp should be in the DD/MM/YYYY format and the timestamp is to be in the 24 hour format HH:MM:SS.