

CSI Performance Based Incentive Payments (PBI)

Payment Process Manual for Customers

Payment Process

PBI incentives are paid monthly over a 5 year period of time (60 payments) based on the actual energy (kWh) produced by your solar energy system. The \$/kWh incentive rate will remain constant for the 5-year PBI term.

PBI payment process:

1. **Applicant submits Incentive Claim Form** and supporting documentation.
2. CCSE reviews Incentive Claim documents and may perform system inspection. If all required documentation is submitted and complete and the system passes inspection (if applicable), **CCSE will issue an Incentive Claim Approval Notice.**

Please read the Incentive Claim Notice carefully as it includes important information:

- Payee name and contact information
 - Final incentive rate (\$ per kWh produced)
 - Performance Data Provider (PDP) who was contracted by you to monitor your production data and send CCSE monthly data reports.
 - Payment Cycle: For Payment Cycle 1, monthly production data will be submitted to CCSE on the 5th of each month. For Payment Cycle 2, monthly production data will be submitted to CCSE on the 20th of each month.
3. CCSE informs the Performance Data Provider (PDP) that the project has been approved and that the payment process can be initiated. To do so, **CCSE sends the PDP a Project Setup Sheet** including the following information:
 - Host customer name
 - Installation Address
 - Incentive rate (\$ per kWh produced)
 - Payment Cycle: determined based on date of interconnection. If a project is interconnected between the 1st and the 15th of the month, the project will fall under Cycle 2. If a project is interconnected between the 15th and the 1st of the month, the project will fall under Cycle 1.
 - Payee name and address (the check will be made out to the payee and will be sent to the payee address).

4. The **PDP will submit PBI data reports to CCSE** with the next upcoming designated cycle date (5th or 20th of each month). CCSE can disburse payments based on retroactive data reports(s) up to the date of interconnection contingent upon the following criteria:
 - All pertinent ICF documentation was submitted correctly by the due date and no ICF suspension notification was issued.
 - Field inspection was passed with no compliance issues (if applicable).
 - Retroactive payments may not exceed 180 days.If the project was suspended at the ICF stage, the payment start date will be based on the date when the Incentive Approval Notice was sent (“Pending Payment” date).
5. After reviewing the PBI data reports for completeness and accuracy, **CCSE will invoice San Diego Gas & Electric** to approve the release of funds to CCSE for payment.
6. **CCSE receives funds from SDG&E and prepares payments** as specified in the Incentive Claim Form. **It is the Applicant’s responsibility to ensure that the payee name and address is correctly specified on the Incentive Claim Form.** Payments may either be made via check, wire transfer or paid via credits on the utility bill.
 - If you would like to be setup to receive payments via **wire transfer**, please submit the “ACH and Wire Transfer Request Form” to be found on our website and attached to the PBI confirmation letter.
 - If you wish to setup **on-bill payments** you will need to contract SDG&E as your Performance Data Provider and contact CCSE to set this up.
7. The payee can expect the initial payment(s) approximately 30 days after receipt of the first scheduled meter read from the PDP.
8. The customer will receive payments for 60 months of production. If a Host Customer moves during the 5-year period, they must notify the Program Administrator, who may make subsequent adjustments to the CSI incentive.

For more information please refer to **Section 4.7.2.2** in the **CSI Handbook** to be found at http://www.gosolarcalifornia.org/documents/CSI_HANDBOOK.PDF

Payment Validation

CCSE performs validations on submitted data reports and incentive payments prior to issuing monthly payments to PBI customers. The validations will compare actual monthly incentive payments with expected payments based on design specifications and will ensure consistency of the submitted data with previous months. If payments fall outside expected ranges for the month, the incentive payment will be withheld until CCSE determines to its satisfaction the reason for the discrepancy. **It is the PDP's and/or Solar Contractor's responsibility to work with the Host Customer to resolve any discrepancies which may include testing and/or recalibrating the meter/devices if deemed necessary.**

Payments on Missing or Incorrect Data Reports

It is important to note that CCSE is not responsible for, and will not pay any customer incentives based on missing, estimated or invalid performance data. If data discrepancies cannot be resolved within 14 days of data submittal, CCSE will not pay out on the submitted data report and proceed with payments when the next complete and correct data report is received from the PDP.

At its discretion, CCSE may grant reasonable allowances for occasional issues or technical problems as well as for large catastrophic events such as earthquakes. Under these circumstances, the Host Customer may request to suspend payment on an incomplete PBI data report and extend the PBI incentive payment period beyond the established timeframe (60 consecutive months). The PBI incentive payment extension period will be equivalent to the same period the system energy production data is unavailable.

The following requirements have to be met to request the suspension of an incomplete data report:

1. The missing or incomplete data is based on metering or communications equipment failure where the production data is irretrievable by the PDP at no fault of the customer
2. It can be determined that the customer's solar system was still operating and interconnected with the utility grid.

In situations in which a communications issue results in missing data, but the data is later retrieved, the Program Administrator will accept the retrieved data and process payment for the recovered data with the next payment period and no extensions of the PBI incentive payment period will be necessary.

If a processed payment is retroactively determined to be incorrect due to a faulty meter read, the correction will be made in the next available payment period.

*For more information please refer to **Section 10** in the **CSI Handbook** to be found at http://www.gosolarcalifornia.org/documents/CSI_HANDBOOK.PDF*