California Solar Initiative Performance Based Incentive Payments (PBI)

Payment Process Manual for Customers

This Performance Based Incentive (PBI) Payment Process Manual is for recipients who are incentivized under the PBI structure. This manual includes information on the PBI payment process, payment receipt expectations, missing payments protocol, and other important information for PBI incentive recipients. Please read through this manual for a full understanding of the PBI program and payment structure. PG&E also requests that you retain this document to reference when you have questions regarding your PBI payments.

Payment Process

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

PBI payment process:

1. Your PV system is inspected by the city or county, interconnected with PG&E and your contractor installs the performance meter to transmit data to your Performance Data Provider (PDP). Please verify that your PDP is receiving data from your system before the Incentive Claim is submitted for your project.

2. Applicant (usually your contractor) submits the Incentive Claim Form and supporting documentation.

3. PG&E reviews Incentive Claim documents and may perform a system inspection. If all required documentation is submitted and complete and the system passes inspection (if applicable), PG&E 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 ($/kWh produced)
- Performance Data Provider (PDP) who was contracted by you to monitor your system including production data and send to PG&E monthly data reports.
- Data Collection Start Date: The starting date for the monthly data collection which also determines the customer’s cycle either Cycle 1 or Cycle 2.
- Performance Meter Information: Provides details of the production meter and identifiers for the PDP to send data to PG&E.
Example Incentive Approval Email Important Information

Application Number: PGE-CSI-12345
Host Customer: Name of Company
Installation Address: 12345 Street Rd. San Francisco, CA 98765
Payee: Name of Company
CEC-AC Rating: 116.027 kW
Design Factor: 102.785%
CSI System Size: 199.258 kW
5-year PBI Incentive Rate: $0.0250 per kWh
Approved Incentive Amount: $26,118.00
PDP Provider: Eligible Performance Data Provider
Data Collection Start Date: October 1, 2012

Performance Meter Information:
2nd Service Point ID: 1234567890
Channel ID: C54567
Virtual Meter ID: C50005789
Manufacturer: Electro Industries/GaugeTech
Model: Shark 100
Serial Number: 9876543210

Note: PG&E chooses the start date based on the date of interconnection to the grid as well as the date the PDP has complete data.

4. The **PDP will submit PBI data reports to PG&E**.

5. The payee can expect the *initial* payment(s) approximately 30 days after receipt of the first scheduled meter read from the PDP (See Payment Receipt Expectations Section).

6. 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](http://www.gosolarcalifornia.org/documents/CSI_HANDBOOK.PDF)*

### Payment Receipt Expectations

<table>
<thead>
<tr>
<th>Cycle</th>
<th>Timeframe</th>
<th>Data Submittal Due Date</th>
<th>Payments Sent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cycle 1</td>
<td>1st of the month – the last day of each month (i.e. January 1-31)</td>
<td>1st-5th of the following month (i.e. data for January 1-31, 2013 is due February 1-5th)</td>
<td>Checks will be mailed within 30 days of the cycle end date* (i.e. a check will be mailed for data for January 1-31 within 30 days from January 31st)</td>
</tr>
<tr>
<td>Cycle 2</td>
<td>16th of the month – the 15th of the next month (i.e. January 16-February 15)</td>
<td>16th-20th of the ending month (i.e. data for January 16-February 15, 2013 is due February 16th-20th)</td>
<td>Checks will be mailed within 30 days of the cycle end date* (i.e. a check will be mailed for data for January 16-February 15 within 30 days from February 15th)</td>
</tr>
<tr>
<td>Retroactive First Payments</td>
<td>Cycle 1 or Cycle 2</td>
<td>ASAP from the receipt of the Incentive Approval Email</td>
<td>Checks will be mailed within 30 days from the receipt of data*</td>
</tr>
</tbody>
</table>

*Checks may be mailed after 30 days if PG&E finds a discrepancy with the data submitted and needs to request more information from the Performance Data Provider (See Payment Validation Section of Handbook).*
**Please keep track of all payments. Payment information including kWh produced for the month, Start Date of the reporting period, and Payment # is listed on the check stub.**

**Payment Validation**
PG&E 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 of expected ranges for the month, the incentive payment will be withheld until PG&E 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 or System Owner 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 PG&E is not responsible for, and will not pay any customer incentives based on missing, estimated or invalid performance data.

At its discretion, PG&E 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 or System Owner 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. For example, if a customer is experiencing performance meter communication issues for two months, then PG&E may offer the customer the option to “skip” these two months and add two months to the end of the customer’s payment cycle.

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.

*PG&E will not grant payment extensions to customers who knowingly power down their systems or experience equipment failure.*

*For more information please refer to Section 10 in the CSI Handbook to be found at http://www.gosolarcalifornia.org/documents/CSI_HANDBOOK.PDF*
Alerts
Performance monitoring companies send alerts to customers when there is an issue with their system. Some performance monitoring companies have the capability to send alerts based on levels of importance where the type of email sent or how often emails are sent are based on the customer’s discretion. For example, your contractor can be assigned to the first level of emails while you as a customer can be assigned to the last level of emails. This way the customer only receives emails when an alert has gone unanswered by the contractor or whoever is listed as the first point of contact. It is very important for the customer to ensure that their email has been included in the alerts set-up so that they are notified of any issues that affect their systems and can potentially affect their PBI payments.

Roles and Responsibilities

Customer – Receives monthly PBI Incentive Checks. The customer is responsible for making sure their email is added to the PMRS system alerts. The customer is also responsible for keeping track of all PBI payments and following up with their installer and/or PDP if there is an issue with a missing payment.

Contractor - Installs the performance meter and performs repairs on any issues with the performance meter.

Performance Monitoring and Reporting Service (PMRS) – This company is hired by you to monitor your system’s performance. This company sends email alerts when there is an issue with your system’s performance. You have most likely hired this company through your contractor. Please ensure you have the contact information for your PMRS provider in case there are any issues with your system.

Performance Data Provider (PDP) - Validates and sends the customer’s production data to PG&E, often the PDP is also the company that monitors the systems performance, the PMRS. Please ensure you have the contact information for your PDP provider in case there are any issues with your system and/or production data.

PG&E - Makes PBI payments based on the production of the system and the approved incentive rate.

Contact Information
Questions about PBI Payments, CSI Incentive Program, and General Solar Questions
Email: Solar@pge.com
Phone: 1-877-743-4112

Solar Customer Service Center Phone Number (Solar or Wind Billing Questions, Interconnection or Net energy Metering Questions, SmartMeter Customer questions)
Phone: 1-877-743-4112

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