

DOCKETED

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Project Title:	Developing Guidelines for the 50 Percent Renewables Portfolio Standard
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Description:	This is the presentation from the RPS Online System Workshop held October 6, 2016.
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Renewables Portfolio Standard Online System Staff Workshop

Christina Crume
Renewables Portfolio Standard
Renewable Energy Division

Arthur Rosenfeld Hearing Room

9:00 a.m.

October 6, 2016



Workshop Agenda

- Welcome & Housekeeping
- Overview of RPS Online System
- Account Management
 - Presentation
 - Demonstration
- Certification
 - Presentation
 - Demonstration
- Lunch Break
- Verification
- Next Steps & Anticipated Schedule



Comment Period

- Comments due **October 19, 2016**
 - Docket 16-RPS-01
- From energy.ca.gov website, select “e-filing and commenting” link under Resources
- Once you are on the e-filing and commenting page, select “Comment on a Proceeding” on the right blue bar
- Enter the Docket #: 16-RPS-01
- Upload your comments



TEST RPS Online System Link

The system is under development and subject to change

- You will be provided with your RPS Merge Form that was submitted
 - Verify the organization, user, and facility information is correct
- If you did not submit a merge form, you will create an account for testing



RPS Online System



CALIFORNIA
ENERGY COMMISSION

Renewables Portfolio Standard

Log In

*User ID

*Password

I have read and agree to the User Terms and Conditions

[Forgot your User ID?](#) [Forgot your Password?](#)

Sign In

Don't have an account

Create an authorized CEC account

Register new account

Public Search

Search for publically available application information

Applications Search



RPS ONLINE SYSTEM OVERVIEW



RPS Online System

- Effective after the adoption of the *RPS Eligibility Guidebook, Ninth Edition* (est. December 2016)
- Use by all LSEs for RPS
- Organization and Account Management
- Certification Applications
- Verification and Compliance Reports



New System – New Benefits

- Real-time updates and information
- No more Excel forms or compatibility issues for applications
- Enhanced instructions and guidance to complete applications
- Access to all documents submitted, applications, and certificates in one place
- Administer authorized individuals



RPS Online System



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Renewables Portfolio Standard

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Sign In

Don't have an account

Create an authorized CEC account

Register new account

Public Search

Search for publically available application information

Applications Search

Replaces current Excel spreadsheet
posted on the CEC website



Public Search

- Search filters
- Can filter before exporting
- Export to Excel
- Export will have original fields

The screenshot shows the 'Public Quick Search' interface on the CA.GOV website. It includes a search form with fields for RPS ID, Suffix (a dropdown menu), Facility Name, Application Status (a dropdown menu), and Resource Type (a dropdown menu). A 'Search' button is located to the right of the Resource Type field. Below the search form, there is a 'Results' section with an 'Export To:' dropdown menu showing 'Excel' and 'CSV' options. The results are displayed in a table with the following data:

RPS ID	Suffix	Facility Name	Status	Primary Resource
	C	Roosevelt Park	Received	Wind
	C	Gas Burner	Received	Biomethane
	C	Test PV Facility	Received	Photovoltaic
60000	C	Glass Mountain Geothermal Energy Center #1	Withdrawn	Geothermal
60001	C	Glass Mountain Geothermal Energy Center #2	Withdrawn	Geothermal
60002	A	Calpine Geothermal Unit 5/6	Approved	Geothermal
60003	A	Calpine Geothermal Unit 7-8	Approved	Geothermal
60004	A	Calpine Geothermal Unit 12	Approved	Geothermal
60005	A	Calpine Geothermal Unit 13	Approved	Geothermal
60006	A	Calpine Geothermal Unit 16	Approved	Geothermal
60007	A	Calpine Geothermal Unit 17	Approved	Geothermal
60008	A	Calpine Geothermal Unit 18	Approved	Geothermal
60009	A	Calpine Geothermal Unit 20	Approved	Geothermal
60010	A	Sonoma/Calpine Geyser	Approved	Geothermal
60011	A	Sycamore Energy 1 LLC	Approved	Biomethane

At the bottom of the table, there is a pagination link: 1 2 3 4 5 6 7 8 9 10 ...



Resources

- Continue testing through the link provided today (until Oct. 19)
- Contact CEC staff

RPSTrack@energy.ca.gov

- Help button in RPS Online System with instructions manual
- Focus Groups, Workshops and Demonstrations



Stakeholder Engagement

- October 6 - Workshop
- October 6 – 19 - System Testing
- October 19 - Comments Due
- October 20 - POU Compliance Focus Group
- Nov - Dec - Additional Workshop(s) on Verification
- December 2016 - Adoption of RPS Guidebook
- End of 2016 - “Go live” of RPS Online System
- Spring 2017 - “Refresher” workshop on Verification



ACCOUNT MANAGEMENT



What will we go over?

August 18th workshop:

- How to create an account
- How to add or update organization information

Today's workshop:

- How to log in to multiple organizations
- How to add a new or existing user
- User roles



Log-in Screen

CA.GOV  **CALIFORNIA ENERGY COMMISSION**

Renewables Portfolio Standard

Log In

*User ID

*Password

I have read and agree to the User Terms and Conditions

[Forgot your User ID?](#) [Forgot your Password?](#)

Don't have an account
Create an authorized CEC account

Public Search
Search for publically available application information



Select Organization

- For users with access to more than one account
- Select from the drop down which account you would like to log in to
- To select a different Organization, you will navigate to the Select Organization from the Acct Mgmt hover tab

A screenshot of the "Select Organization" interface. The page header includes the "CA.GOV" logo, the California Energy Commission logo, and the text "CALIFORNIA ENERGY COMMISSION UAT". The user's name "Christina Crume" and links for "Help", "FAQs", and "Logout" are visible in the top right. The main content area is titled "Select Organization" and contains a dropdown menu labeled "Organization(s)" with the following options: "Christina's Account", "Christina's Account", and "Migration Account - External". A "Confirm" button is located to the right of the dropdown menu. The text "Organization Account Name" is visible in the top right corner of the page.



Organization Information

- Update, change or add address
- Add & delete users
- Set user permissions

The screenshot shows the 'Organization Information Detail' page in the UAT. The page includes a header with the CA.GOV logo, navigation tabs (HOME, APPLICATIONS, VERIFICATION REPORTS, ACCT MGMT), and user information (Christina Crume | Help | FAQs | Logout). The main content area is titled 'Organization Information Detail' and contains three sections: 'Organization Information', 'Address', and 'Users'. Each section has a table of data and 'Add' or 'Delete' buttons.

Organization Information

*Organization Name	Testing Account
Organization Name aka	
POU Code	

Address

	Line 1	City	State	Country	Address Type
Select	<input type="checkbox"/> 1516 9th Street	Sacramento	California	USA	Both

Users

	First Name	Last Name	Email Address	Role
Select	<input type="checkbox"/> Christina	Crume	christina.crume@energy.ca.gov	External System Admin



How to add a user to your account

- Difference between an existing user and a new user
- How to add an existing and new user
- Importance of adding an existing user versus creating another new user account



Add an Existing User

- Click the “Add Existing User” button

The screenshot shows the 'Organization Information Detail' page in the UAT. The page includes a header with the CA.GOV logo, the California Energy Commission logo, and the text 'CALIFORNIA ENERGY COMMISSION UAT'. The user is logged in as 'Christina Crume' and is viewing a 'Testing Account'. The page has a navigation menu with 'HOME', 'APPLICATIONS', 'VERIFICATION REPORTS', and 'ACCT MGMT'. The main content area is titled 'Organization Information Detail' and contains several sections: 'Organization Information' with input fields for 'Organization Name' (filled with 'Testing Account'), 'Organization Name aka', and 'POU Code'; 'Address' with a table of address lines; and 'Users' with a table of users. The 'Add Existing User' button is circled in red.

Organization Information Detail Save Cancel

Organization Information

*Organization Name

Organization Name aka

POU Code

Address

	Line 1	City	State	Country	Address Type
Select	<input type="checkbox"/> 1516 9th Street	Sacramento	California	USA	Both

Add Delete

Users

	First Name	Last Name	Email Address	Role
Select	<input type="checkbox"/> Christina	Crume	christina.crume@energy.ca.gov	External System Admin

Add Existing User Add New User Delete



Add an Existing User

- Type the first name, last name, and/or organization
- Click “Search”

A screenshot of the California Energy Commission's User Account Tool (UAT) interface. The top navigation bar includes the CA.GOV logo, the California Energy Commission logo, and the text "CALIFORNIA ENERGY COMMISSION UAT". The user's name "Christina Crume" and links for "Help", "FAQs", and "Logout" are visible. Below the navigation bar, there are tabs for "HOME", "APPLICATIONS", "VERIFICATION REPORTS", and "ACCT MGMT". The main content area is titled "User List" and contains a "Search" section with three input fields labeled "First Name", "Last Name", and "Organization". A "Search" button is highlighted with a red circle. A "Previous" button is located at the bottom right of the search area.



Add an Existing User

- Select the correct user by clicking “Select” next to the user
- Set the user roles on the next page

CA.GOV CALIFORNIA ENERGY COMMISSION UAT

Christina Crume | Help | FAQs | Logout

Organization Account Name

HOME APPLICATIONS VERIFICATION REPORTS ACCT MGMT

User List

Search

First Name Last Name Organization

elisabeth

Search Results

	First Name	Last Name	Organization
Select	Elisabeth	de Jong	Christina's Account
Select	Elisabeth	de Jong	energy
Select	Elisabeth	de Jong	Pacific Light & Power
Select	Elisabeth	de Jong	Christina's Account
Select	Elisabeth	de Jong	Elisabethtown Power
Select	Elisabeth	de Jong	Elisabeth's Organization
Select	Elisabeth	de Jong	Pacific Light & Power



Add a New User

- Click the “Add New User” button

The screenshot shows the 'Organization Information Detail' page in the UAT. The page includes a header with the CA.GOV logo, navigation tabs (HOME, APPLICATIONS, VERIFICATION REPORTS, ACCT MGMT), and user information (Christina Crume, Help, FAQs, Logout). The main content area is divided into sections: 'Organization Information' with input fields for Organization Name (containing 'Testing Account'), Organization Name aka, and POU Code; 'Address' with a table of address lines; and 'Users' with a table of existing users. The 'Add New User' button is circled in red.

Organization Information Detail Save Cancel

Organization Information

*Organization Name

Organization Name aka

POU Code

Address

	Line 1	City	State	Country	Address Type
Select	<input type="checkbox"/> 1516 9th Street	Sacramento	California	USA	Both

Add Delete

Users

	First Name	Last Name	Email Address	Role
Select	<input type="checkbox"/> Christina	Crume	christina.crume@energy.ca.gov	External System Admin

Add Existing User Add New User Delete



Add a New User

- Name of user
- Valid email address
- Phone number
- Unique User ID

The screenshot shows the 'Add or Update User' form in the UAT system. At the top, there is a navigation bar with the CA.GOV logo, the California Energy Commission logo, and the text 'CALIFORNIA ENERGY COMMISSION UAT'. On the right side of the navigation bar, there are links for 'Christina Crume | Help | FAQs | Logout' and a label 'Organization Account Name'. Below the navigation bar, there are tabs for 'HOME', 'APPLICATIONS', 'VERIFICATION REPORTS', and 'ACCT MGMT'. The main content area is titled 'User Information' and contains a 'Save' button circled in red and a 'Cancel' button. Below this, there are 'Instructions' and a section for 'Add or Update User' with the following fields:

*First Name	*Last Name
<input type="text"/>	<input type="text"/>
*Phone Number	Fax Number
<input type="text"/>	<input type="text"/>
*Email Address	*Reenter Email Address
<input type="text"/>	<input type="text"/>
*User ID	*Effective Date
<input type="text"/>	<input type="text"/>



Set User Role

- Select User Role for the user
- Click “Save”
- Changes are only made after the user logs back in to the System

A screenshot of the California Energy Commission's user management interface. The page title is "Assign Role". In the top right corner, there are links for "Christina Crume", "Help", "FAQs", and "Logout". Below the navigation bar, there is a "HOME" and "ACCT MGMT" menu. The main content area has a "Save" button circled in red, followed by a "Cancel" button. Below the buttons, there is an "Instructions" section with two bullet points: "Note: These roles can be changed at any time." and "The user must logout and login in order for the change to the role to become effective." Below the instructions is a list of roles with checkboxes: "Account Holder System Admin", "Certification Viewer/Trainee", "Certification Biomethane Attestant", "Certification Attestant", "Certification Applicant", "Verification Reporting Agent", "Verification Viewer/Trainee", and "Verification Attestant".



User Roles

Account Holder System Admin

- Can add/delete users, update organization information

Certification Viewer/Trainee

- Can only view certification related pages

Certification Biomethane Attestant

- Can attest to biomethane source information on an application when selected

Certification Attestant

- Can attest to certification, precertification, and aggregated applications

Certification Applicant

- Can fill out and complete an application



User Roles

Verification Reporting Agent

- Can have access and complete all verification pages, but cannot view or submit attestations

Verification Viewer/Trainee

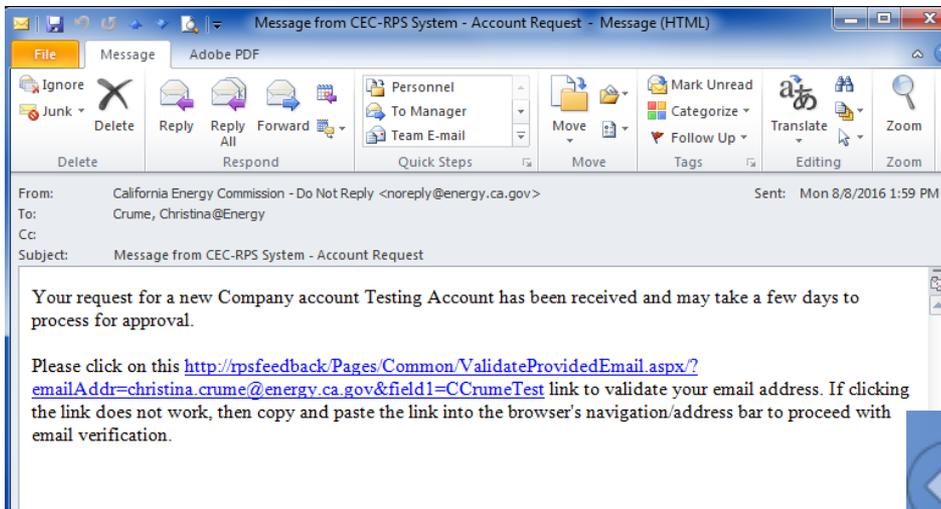
- Can only view verification related pages

Verification Attestant

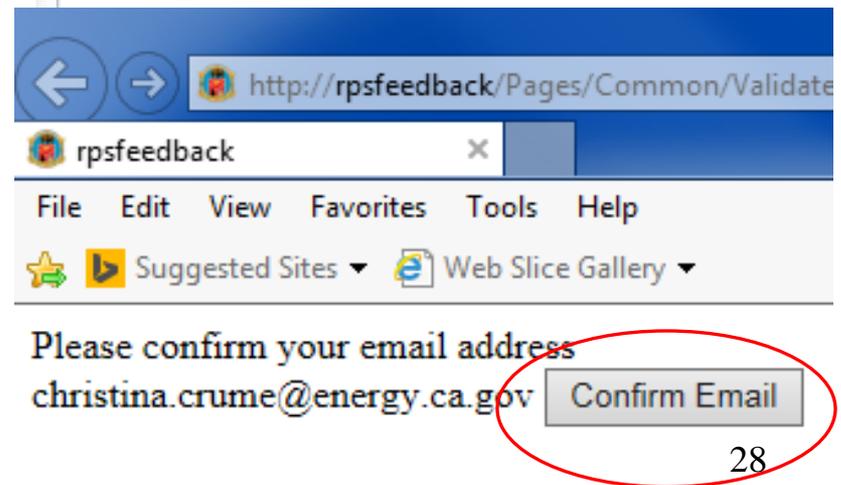
- Can access all verification screens and submit verification attestations



Confirm email



You must validate your email by clicking the link before you can be added to an account





User Approval and First Login

Delete	Respond	Quick Steps	Move	Tags	Editing	Zoom
From:	California Energy Commission - Do Not Reply <noreply@energy.ca.gov>				Sent: Tue 8/9/2016 8:16 AM	
To:	Crume, Christina@Energy					
Cc:						
Subject:	Message from CEC-RPS System - Account Confirmation					

Your account has been successfully created.

Your User ID is CCrumeTest

Your temporary password is 35E0694135

Please log in to your account and change the password. Your temporary password will expire in 14 days. For assistance, please email RPSTrack@energy.ca.gov.

- Receive email with temporary password
- Must login within 14 days and change password



My Profile

- Change Password
- Answer Security Questions
- Agree to Privacy Policy and Terms of Use

CA.GOV CALIFORNIA ENERGY COMMISSION UAT
HOME APPLICATIONS VERIFICATION REPORTS ACCT MGMT
Christina Crume | Help | FAQs | Logout
Testing Account

My Profile Save Cancel

Contact Information

*First Name	Christina	*Last Name	Crume
*Phone Number	9166544674	Fax Number	
*Email Address	christina.crume@energy.ca.gov		
*User ID	CCrumeTest	*User Status	Approved
		*Effective Date	08/08/2016

Login Information

Current Password

New Password

Confirm Password

Password requirements:

- Must be at least 10 characters
- Must contain at least 1 number
- Must contain at least 1 special character (@, &, #, etc.)
- Must contain at least 1 uppercase and 1 lower case letter

Security Questions

Answers are case sensitive.

*Security Question 1
Please Select

*Answer 1



ACCOUNT MANAGEMENT DEMONSTRATION



COMMENTS



CERTIFICATION APPLICATIONS



What will we go over?

August 18th workshop:

- How to create a new application for precertification and certification

Today's workshop:

- How to amend an existing application
- How to certify a precertified facility



Applications

The screenshot shows the California Energy Commission website interface. At the top right, it displays the user name 'Christina Crume' and links for 'Help', 'FAQs', and 'Logout'. Below this is the 'CA .GOV' logo and the 'CALIFORNIA ENERGY COMMISSION' name with a 'UAT' (User Acceptance Testing) label. A navigation bar contains 'HOME', 'APPLICATIONS' (highlighted with a red circle), 'VERIFICATION REPORTS', and 'ACCT MGMT'. Below the navigation bar, there are two columns of application options, each with a red box around it:

- Create Pre-Certification Application
- Create Certification Application
- Amend Existing Application
- Create Aggregated Unit Application
- Certify a Precertified Facility
- Apply For Time Extension Request

At the bottom, there is a table header with columns: 'RPS ID', 'Sumix', 'Facility Name', 'Status', and 'Primary Resource'. Below the header, it states 'No records found'.

- Apply for new precertification
- Apply for new certification
- Apply for new aggregated unit



Amending an Application

The screenshot shows the California Energy Commission website interface. At the top right, the user is logged in as 'Christina Crume' with links for 'Help', 'FAQs', and 'Logout'. The user's account type is 'Testing Account'. The main navigation menu includes 'HOME', 'APPLICATIONS' (highlighted with a red circle), 'VERIFICATION REPORTS', and 'ACCT MGMT'. Under the 'APPLICATIONS' menu, there are six options: 'Create Pre-Certification Application', 'Create Certification Application', 'Amend Existing Application' (highlighted with a red box), 'Create Aggregated Unit Application', 'Certify a Precertified Facility', and 'Apply For Time Extension Request'. Below the menu is a 'Results' section with a table header: 'RPS ID', 'Sumix', 'Facility Name', 'Status', and 'Primary Resource'. The table content shows 'No records found'. There are also links for 'Export to Excel' and 'CSV'.



Amend an Application

- Select facility to amend and click “Apply for Amendment”
- Copies current application
- **Does not** change from precertification to certification

The screenshot shows the 'Apply for Amendment' page in the UAT system. At the top, there is a navigation bar with 'CA.GOV' and 'CALIFORNIA ENERGY COMMISSION UAT'. The user is logged in as 'Christina Crume' and is in a 'Testing Account'. The main content area has a form with fields for 'Application #', 'RPS ID', 'Facility Name', 'Received From', and 'Received To', along with a 'Search' button. Below the form is a 'Results' section with a table. The table has columns for 'Type', 'RPS ID', 'Status', 'Facility', and 'Received Date'. A single row is visible with 'Pre-Certification', '63327', 'Approved', 'PV Facility', and '08/09/2016'. A red circle highlights the checkbox in the 'Type' column for this row. To the right of the table, there is an 'Export To:' dropdown menu with 'Excel' and 'CSV' options. A red circle highlights the 'Apply for Amendment' button located at the bottom right of the table area.

Type	RPS ID	Status	Facility	Received Date
<input type="checkbox"/> Pre-Certification	63327	Approved	PV Facility	08/09/2016



Certifying a Precertified Facility

The screenshot shows the user interface of the California Energy Commission's UAT (User Acceptance Testing) environment. The top navigation bar includes the CA.GOV logo, the California Energy Commission logo, and the text 'CALIFORNIA ENERGY COMMISSION UAT'. The user is logged in as 'Christina Crume' and is viewing the 'Testing Account' page. The main navigation menu has 'APPLICATIONS' highlighted with a red circle. Below the navigation, a list of application options is displayed, with 'Certify a Precertified Facility' highlighted by a red rectangle. The interface also shows a table with columns for RPS ID, Sumix, Facility Name, Status, and Primary Resource, and a message indicating 'No records found'.

Christina Crume | Help | FAQs | Logout

CA.GOV CALIFORNIA ENERGY COMMISSION UAT Testing Account

HOME APPLICATIONS VERIFICATION REPORTS ACCT MGMT

- Create Pre-Certification Application
- Create Certification Application
- Amend Existing Application
- Create Aggregated Unit Application
- Certify a Precertified Facility**
- Apply For Time Extension Request

Results Export to Excel CSV

RPS ID	Sumix	Facility Name	Status	Primary Resource
No records found				



Certify a Precertified Facility

- Select facility to amend and click “Apply for Certification”
- Copies current application information
- Update information for certification

The screenshot shows the 'Application to Certify a Generating Facility' page. It includes a search form with fields for Application #, RPS ID, Facility Name, Received From, and Received To, along with a 'Search' button. Below the search form is a 'Results' table with columns for Type, RPS ID, Status, Facility, and Received Date. The first row in the table is highlighted, and a red circle is drawn around the 'Apply for Certification' button in the bottom right corner of the table row.

Type	RPS ID	Status	Facility	Received Date
<input type="checkbox"/> Pre-Certification	63327	Approved	PV Facility	08/09/2016



Application Summary

CALIFORNIA ENERGY COMMISSION UAT

Christina Crume | Help | FAQs | Logout

Testing Account

HOME
APPLICATIONS
VERIFICATION REPORTS
ACCT MGMT

Pre-Certification Application Summary RPS ID: Not Assigned

Facility Information	
Name of Facility	PV Facility
Physical Location	
Address	1516 9th Street
City	Sacramento
State	California
Zip	95814
Country	USA
Can Mail Be Delivered To The Facility Location?	Yes
Facility Resource Information	
Primary Resource	Photovoltaic
Facility Interconnection	
Balancing Authority	CAISO - California Independent System Operator
Facility Operations	
Nameplate Capacity	1
Commercial Operations Date	8/10/2016
Repowered/Incremental facility?	No
Facility Measurement Methodology Information	
Energy Storage?	No
Facility Owner Information	
Name	Facility Owner
E-Mail	christina.crume@energy.ca.gov
Address	1516 9th Street
City	Sacramento
State	California
Zip	95814
Country	USA

Facility Locator

Facility Point
 Facility Boundaries
 County Lines
 >

Imagery

+
-

Bureau of Land Management, Esri, HERE, DeLorme, INCREM...

Note



Submitting an Application

- Attest to the application
- Click “Submit”
- Can no longer alter the application



Application Status

- Application status in real time

The screenshot shows the user interface of the California Energy Commission's UAT (User Acceptance Testing) application status page. At the top, there is a navigation bar with the CA.GOV logo, the California Energy Commission logo, and the text "CALIFORNIA ENERGY COMMISSION UAT". The user is logged in as "Christina Crume" and is using a "Testing Account". The main navigation menu includes "HOME", "APPLICATIONS", "VERIFICATION REPORTS", and "ACCT MGMT".

The "Home Page" section features a tabbed interface with "Application Inbox" selected. Below the tabs, there is a search form with the following fields:

- RPS ID:
- Suffix:
- Facility Name:
- Application Status:
- Resource Type:
- Search:

Below the search form, there is a "Results" section with an "Export To:" dropdown menu showing "Excel" and "CSV" options. The results are displayed in a table:

	RPS ID	Suffix	Facility Name	Status	Primary Resource
Select	63327	C	PV Facility	Pending	Photovoltaic



NOTIFICATIONS



Notifications

- All notifications under tab
- Sort by RPS ID & date
- View incoming & outgoing notifications

The screenshot shows the California Energy Commission UAT interface. The top navigation bar includes the CA.GOV logo, the California Energy Commission logo, and the text 'CALIFORNIA ENERGY COMMISSION UAT'. The user is logged in as 'Christina Crume' and is viewing a 'Testing Account'. The main navigation menu includes 'HOME', 'APPLICATIONS', 'VERIFICATION REPORTS', and 'ACCT MGMT'. The 'Home Page' section has tabs for 'Application Inbox', 'Facilities', 'Notifications', 'TER', and 'Verification'. The 'Notifications' tab is active, showing search filters for 'RPS ID', 'Recipient', 'Subject', 'Incoming/Outgoing', and 'Sent Date From'. A 'Search' button is present. Below the search filters, the 'Results' section shows a table with two rows of notification data.

	RPS ID	Sent Date	Subject	Facility Name
Select	63327	8/9/2016	RPSID ASSIGNED	PV Facility
Select	63327	8/9/2016	Pre-Certification Received	PV Facility



CERTIFICATION APPLICATION DEMONSTRATION



COMMENTS