DOCKETED

Docket Number:	16-RPS-01
Project Title:	Developing Guidelines for the 50 Percent Renewables Portfolio Standard
TN #:	213915
Document Title:	Presentation - Renewables Portfolio Standard Online System Staff Workshop
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

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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

Merging Current Data

- Organization Account
- Primary User
- RPS Certified facilities

If you have not submitted the RPS Merge Form, please contact CEC staff

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RPS Online System

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

Replaces current Excel spreadsheet posted on the CEC website

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Public Search

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

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

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Log-in Screen

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?

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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

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Organization Information

- Update, change or add address

- Add & delete users

- Set user permissions

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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

Add an Existing User

- Type the first name, last name, and/or organization

- Click "Search"

Add an Existing User

- Select the correct user by clicking "Select" next to the user

- Set the user roles on the next page

Add a New User

- Click the "Add New User" button

Add a New User

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

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Set User Role

- Select User Role for the user

- Click "Save"

- Changes are only made after the user logs back in to the System

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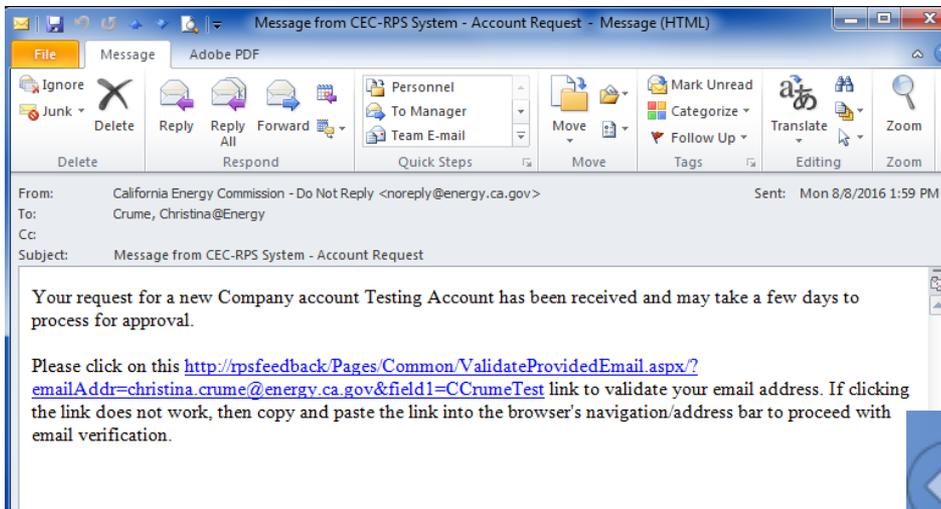
You **must** validate your email by clicking the link before you can be added to an account

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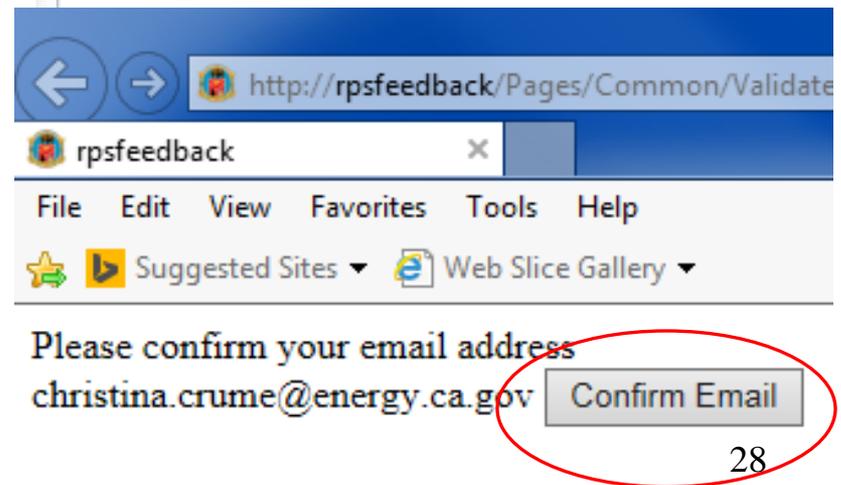
User Approval and First Login

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

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My Profile

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

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

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Applications

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

Amending an Application

Amend an Application

- Select facility to amend and click "Apply for Amendment"

- Copies current application

- **Does not** change from precertification to certification

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Certifying a Precertified Facility

Certify a Precertified Facility

- Select facility to amend and click "Apply for Certification"

- Copies current application information

- Update information for certification

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Application Summary

Submitting an Application

- Attest to the application
- Click "Submit"
- Can no longer alter the application

Application Status

- Application status
in real time

NOTIFICATIONS

Notifications

- All notifications under tab

- Sort by RPS ID & date

- View incoming & outgoing notifications

CERTIFICATION APPLICATION DEMONSTRATION

COMMENTS