



Solar*Rewards Community

How to: Subscriber Maintenance, Bill Credits, and the Monthly Owners Report (MOR)

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Disclaimer

This PPT Manual is frequently revised.

Please use the web version **only**,
To ensure the most up-to-date information.

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Subscriber Maintenance

During the period of solar garden operation, the Garden Operator will be responsible for subscriber maintenance, including verification that subscribers remain valid in the portal in order to continue receiving bill credits. Courtesy notifications may be sent by Xcel Energy to the Primary Application Manager when subscribers go invalid, but the SRC Application Portal will be the system of record and the Solar Garden Operator should continue monitoring the portal each month to ensure validity.

Subscriber Maintenance

- For ease of review, the “Subscriber Allocation Summary” Report in the SRC portal will show your subscribers and their validity across all gardens in one place.
- Questions may be directed to SolarRewardsCommMN@xcelenergy.com regarding program requirements

Subscriber Maintenance

Monthly Reports

- Available for Primary Application Manager & Account Team Members
- Located under “Reports” tab on Developer Portal

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Field Trip Reports

[Export](#) [All Field Analyses](#) – Grouped by Field Trip
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Solar Garden Owner Reports

[Export](#) [Monthly Owner Report](#) – Snapshot of allocated and unallocated kWh production
[Export](#) [Monthly Production in kWh](#) – Summary of monthly garden production
[Export](#) [Subscriber Allocation Summary](#) – Shows all subscribers by garden with allocation
[Export](#) [Upcoming Deadlines](#) – Summary of upcoming deadlines for Xcel Energy deliverables.

Bill Credits and Solar Garden Reports

- 1) Bill credits will be issued to subscribers who are valid in the SRC portal at the beginning of a given production month. Per the Section 9 tariff, subscribers should be entered and validated at least 5 calendar days before the beginning of the month. Bill credits will be issued based on the Section 9 Applicable Retail Rate or Value of Solar bill credit rate in place at the time of solar garden production.
- 2) Shortly after bill credits are posted to customers' accounts, they will also appear on the "Monthly Owner Report" in the SRC portal.

Bill Credit Timing

- Solar Production recorded in kilowatt hours (kWh)
- Subscriber allocations calculated into bill credit
- Production is posted to subscriber accounts on the 9th of each month
- Timing
 - If billing cycle after the 9th, subscriber will receive credits for the previous month's production
 - If billing cycle before the 9th, subscriber credits will have a one month lag
 - If billing cycle occurs on the 9th, subscriber credits will vary
- Subscribers can request to have their billing date changed by calling Xcel Energy Customer Service (**1-800-895-4999**)

Sample Subscriber Bill Credits

SERVICE ADDRESS: TANKS
1234 MAIN ST MINNEAPOLIS MN 55555-5555
NEXT READ DATE: 05/13/14

ELECTRICITY SERVICE DETAILS

PREMISES NUMBER: 333333333
INVOICE NUMBER: 454545454

METER READING INFORMATION				
METER	Read Dates: 03/12/14 - 04/12/14 (31 Days)			
DESCRIPTION	CURRENT READING	PREVIOUS READING	MEASURED USAGE	BILLED USAGE
Total Energy	15600 Actual	15539 Actual	61	2448 kWh
On-Pk Energy	669 Actual	667 Actual	2	80 kWh
Off-Pk Energy	14931 Actual	14872 Actual	59	2368 kWh

ELECTRICITY CHARGES

RATE: Limited Off-Pk Srvc

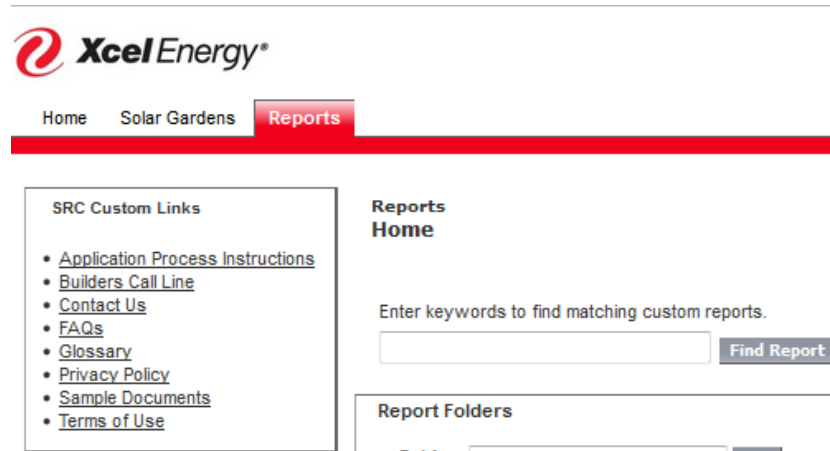
DESCRIPTION	USAGE UNITS	RATE	CHARGE
Basic Service Chg			\$13.60
Off-Peak Energy Chg	2360 kWh	\$0.023700	\$55.93
On-Peak Energy Chg	80 kWh	\$0.260000	\$20.80
Fuel Cost Charge	2440 kWh	\$0.033918	\$82.76
Resource Adjustment			\$10.79
Interim Rate Adj			\$5.87
Subtotal			\$189.85
City Fees			\$3.00
Total			\$192.85

OTHER RECURRING CHARGES DETAILS

DESCRIPTION	CHARGE
Solar Rewards Community Solar	
Production Credit	
Solar Production Period	February 2014
SRC700040 Production Credit	1559.9 kWh x 0.117830
Total	\$183.80 CR
	- \$183.80 CR

Bill Credits and Solar Garden Reports

3) Reports can be accessed by selecting the “Reports” tab at the top left of the SRC portal screen. The applicable reports will be under the “Solar Garden Owner Reports” section of the page



Monthly Owners Report

4) On the Monthly Owner's Report, Solar Garden Production will appear listed in the following categories:

- P = Production
 - OS = Owner Subscribed
- OU = Owner Unsubscribed
S = Subscribers Allocation

**Each valid subscriber will have two line items (standard tariff rate and REC adder)*

Payment Type	Debtor Number	Premise Number	Subscriber Allocation	Subscriber Name	Monthly Production Allocation in kWh	Tariff Rate	Bill Credit
Garden ID: [REDACTED] (411 records)							
Name Plate Capacity (kW DC): 1,300.000 (411 records)							
Calendar Month: 2017-09 (46 records)							
OS	[REDACTED]	[REDACTED]	-		169,486.00	0.000000	0.00
OU	[REDACTED]	[REDACTED]	-		0.00	-0.010000	0.00
P	[REDACTED]	[REDACTED]	-		169,486.00	-	-
OU	[REDACTED]	[REDACTED]	-		0.00	-0.026480	0.00
S	[REDACTED]	[REDACTED]			19,660.38	-0.020000	393.21
S	[REDACTED]	[REDACTED]			19,660.38	-0.102960	2,024.23
S	[REDACTED]	[REDACTED]			1,355.89	-0.127980	173.53
S	[REDACTED]	[REDACTED]			1,355.89	-0.020000	27.12
S	[REDACTED]	[REDACTED]			1,186.40	-0.020000	23.73
S	[REDACTED]	[REDACTED]			1,186.40	-0.127980	151.84
S	[REDACTED]	[REDACTED]			2,881.26	-0.127980	368.74
S	[REDACTED]	[REDACTED]			2,881.26	-0.020000	57.63

Description of Solar Garden Production Categories

P: Total Production from the solar garden

OU: Overall Unsubscribed Production from the solar garden. Credits for this production will be paid out to the Solar Garden Operator as a bill credit on their Xcel Energy bill at the unsubscribed energy rate.

OS: Overall Subscribed Production from the solar garden

Description of Solar Garden Production Categories

S: Subscribed Production- there will be a line item for each individual subscriber allocation to indicate the production in kWh allocated to the subscriber as well as their bill credit rate and the bill credit amount in \$ that was posted to the customer accounts. In the case of subscribers receiving the Enhanced Applicable Retail Rate, there will also be a second line item showing the same kWh production values for the customer but with the \$0.02 cent Renewable Energy Credit adder to compensate for the sale of the Renewable Energy Credits to Xcel Energy.

- With reference to the the kWh produced, $OU + OS = P$ and sum of $S = OS$, not including the REC credits (which would duplicate the line items for subscribed kWh).

Subscriber Allocation Summary

- Minimum 5 valid subscribers, must be in-compliance 5 business days before the end of the month

Report Options:

[Run Report](#) [Hide Details](#) [Printable View](#) [Export Details](#)

Generated Report:

Filtered By: 1 OR 2

- Solar Garden: Status equals Active
- Solar Garden: Status contains Step 6: Active, Step 8: Active

Premise #	Debtor Number	Solar Garden: Garden Name	Subscriber Name	Allocation (in kW)	Status	Status	Subscriber Agency Agreement	Is Low Income Subscriber
Solar Garden: Solar Garden ID: [REDACTED] 21 records)								
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	11.700	Valid	Valid Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	[REDACTED]	[REDACTED]	[REDACTED]	15.600	Valid	Valid Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	[REDACTED]	[REDACTED]	[REDACTED]	37.700	Valid	Valid Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	[REDACTED]	[REDACTED]	[REDACTED]	390.000	Valid	Valid Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	[REDACTED]	[REDACTED]	[REDACTED]	150.800	Valid	Valid Customer	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Additional Subscriber Maintenance Information

- [Sample Monthly Owner's Report \(PDF\)](#)
- [Subscriber FAQs \(PDF\)](#)
- [Subscriber Portal Error Key](#)

Program Reminders- Billing Issues

- Potential issues Developers can see:
 1. Delay in Bill Credits-Subscribers
 2. Delay in Monthly Owners Report (MOR)- Garden Operators
- Causes of Issues:
 1. Backdating PTO (both)
 2. Metering Communication (both)
 3. Enrollment Changes (both)
 4. Transferring data to MOR (Garden Operators)

1. Backdating PTO

- Can cause delays in bill credits to subscribers and MOR
 - PTO at month end, but outstanding requirements and PTO letter is sent following month
 - **Anticipate a delay**
 - What can you do?
 - Ensure requirements are met BEFORE testing, so testing approval and billing begin same day
 - **Or we can stop backdating PTO**

2. Metering Communications

- Can cause delays in bill credits to subscriber or MOR
- Root causes related to Xcel Energy **or** Developer
 - What are we doing?
 - SRCMN email notification when discovered
 - Issue= ours: Dispatch technicians to resolve
 - What can you do?
 - **Communicate internally**
 - Issue=developers: Time resolve, respond to communication

3. Enrollment Changes

- Subscriber changes can affect enrollments, switch to **invalid**
- Affects bill credits for that particular subscriber
- Can affect garden as a whole
- What can you do?
 - Subscriber management team
 - All enrollments should be **valid**

4. Transferring data to MOR

- Automated, monthly transfer
- Production data from metering/billing system to Salesforce
- Does not affect customer bill credits, only Salesforce reporting
- $<100 / 17,000$ unique subscriptions= **0.00588%**
- What are we doing?
 - Additional validations implemented to reduce error

Subscriber Timeline Overview

- 25th of month – All subscriptions valid (minimum)
- End of month – Allocation snap shot
- 9th of month – Bill Credits post
- 15th of month – MOR posts

