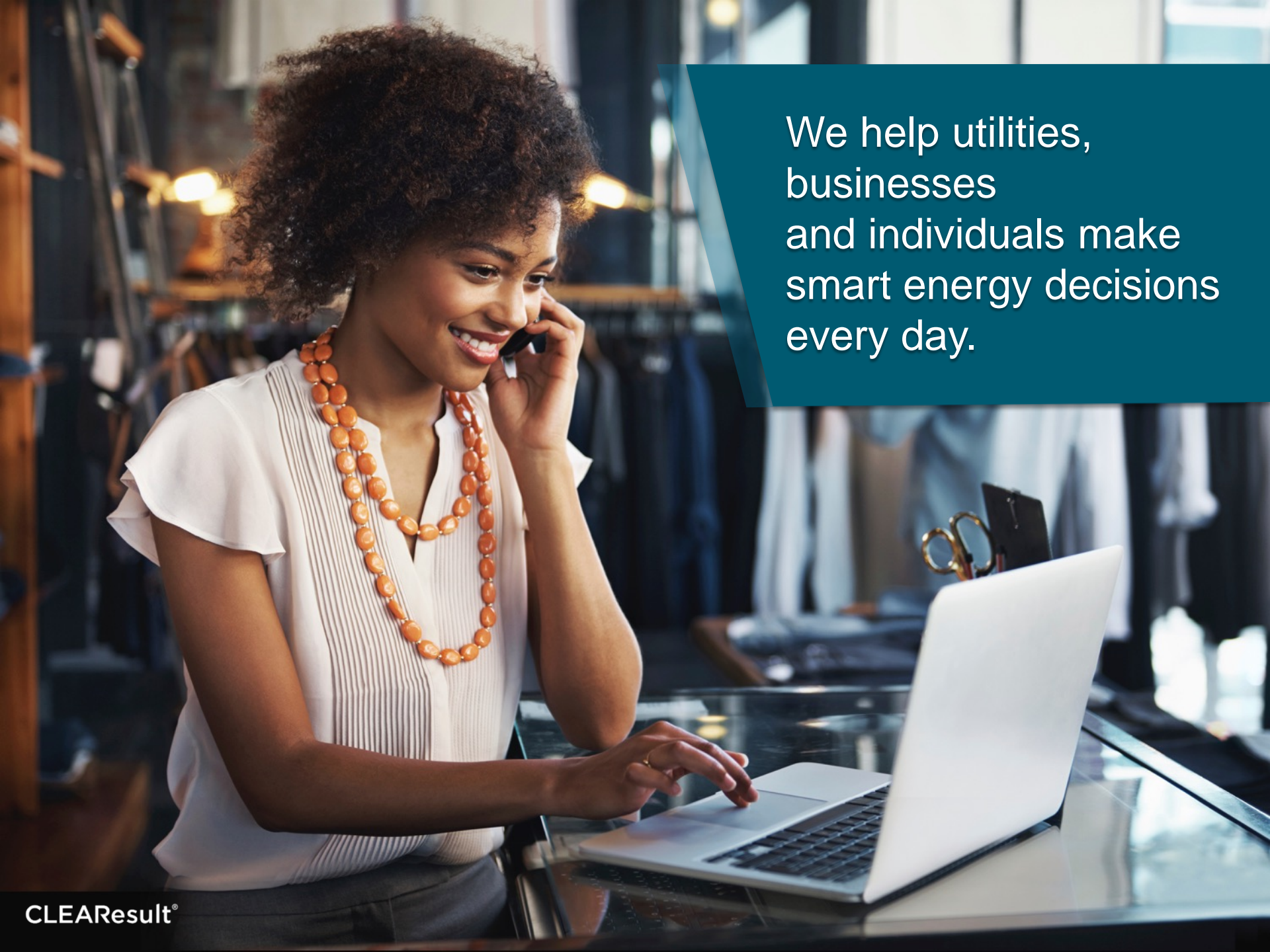


**CLEAResult<sup>®</sup>**



**Massachusetts SMART Program  
SEBANE Summer Meeting  
June 27, 2018**

We change the way  
people use energy<sup>™</sup>



We help utilities,  
businesses  
and individuals make  
smart energy decisions  
every day.

# Our comprehensive portfolio



PROGRAM FILING ▪ PLANNING & DESIGN ▪ IMPLEMENTATION ▪ MEASUREMENT & EVALUATION ▪ PILOTS

Residential	Commercial and Industrial	Institutional and Other	Direct to Businesses
Behavioral Demand response Direct install Electric vehicles Energy advisor Existing & New homes HVAC Low income Multifamily Online audits Residential program marketing Retail School kits Solar PV/hot water	Behavioral Commercial program marketing Custom & prescriptive Data centers Demand response Electric vehicles Grocery HVAC Midstream Market verticals New construction Retrocommissioning Small business Strategic Energy Management	Agriculture Combined heat and power Contact centers Government Hospitals Manufacturing Marketing services Oil & gas <b>Renewables</b> Service providers	Design Build Grocery Strategic Energy Management  Learn more about our solutions at <a href="http://clearResult.com">clearResult.com</a> .

# SMART Application Process

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# SMART Program Resources for Solar Developers, Applicants, and Owners

The timing of SMART launch is dependent the MA Department of Public Utilities (DPU) SMART Tariff proceedings.

Two SMART Program website types under development:

- [www.MASmartSolar.com](http://www.MASmartSolar.com)
  - General program information & updates
  - Frequently Asked Questions
  - “How To” guides & checklists
  - Links to regulations & electric distribution company (EDC) websites
  
- <https://MASmartSolar.PowerClerk.com>
  - Online, secure application portals
  - Access is limited by username & password
  - Each user has their own account
  - Can grant access on a project by project basis so employees at same company can share
  - All communication & documentation via portal!

# [www.MASmartSolar.com](http://www.MASmartSolar.com)

- General program information
- Updates on program dates, processes, etc.
- Frequently Asked Questions
- Links to regulations, etc.
- Links to utility interconnection and related webpages
- Instructions and “How To” guides are being developed

## Solar Massachusetts Renewable Target (SMART) Program

Total Megawatts Available  
\* estimated, rounded off values

Please select the corresponding link for the Electric Distribution Company (EDC) to view total megawatt availability.

- Eversource
- National Grid
- Unitil

**Disclosure**  
The data provided is the best available estimate, based on a once daily update schedule. True values are collected in real time as SMART applications are processed. These estimates are for informational purposes only and should not be relied upon solely for the purpose of making investment or buying decisions.

**Questions?**  
Call 888-989-7752 or email [MA.SMART@clearresult.com](mailto:MA.SMART@clearresult.com)

**Interconnection Information**  
Eversource  
National Grid  
Unitil

### Building a Brighter Future for Massachusetts

The Massachusetts Department of Energy Resources (DOER), in conjunction with the participating electric utilities is setting their sights even higher for the most energy-efficient state in the nation by launching the Solar Massachusetts Renewable Target (SMART) Program. The SMART Program is a long-term sustainable solar incentive program sponsored by Eversource, National Grid and Unitil. SMART will encourage the development of solar photovoltaic (PV) technology by supporting 1,600 MW of new solar generating capacity.

The SMART Program began with 17 projects totaling 53,273 MW of solar PV. These new Solar Tariff Generation Units (STGUs) will generate clean, renewable power for decades to come. Along with this first block of awards, the Base Compensation Rate levels have been set for the SMART program. In the summer of 2018, the SMART Program will become available to solar PV projects of all types and sizes, up to 5 MW per project.

With your help, we can create a brighter, more sustainable future for Massachusetts.

Overview Apply Updates Regulations Resources FAQ

### Overview

The SMART program is a declining block program in which the incentive levels will decline by prescribed amounts over up to eight blocks per Electric Distribution Company (EDC) territory. There are set-aside amounts for small projects (≤ 25 kW AC) in each block to enable projects of all sizes to participate. SMART also has Adders available that increase the amount of the incentive if features such as Energy Storage, Community Solar, or various location-based installations are proposed.

### How to participate in the SMART Solar Program

- 1 Apply PowerCheck
- 2 Preliminary Assessment of Qualification
- 3 Send and Interconnect System
- 4 Submit Inverter Data or PowerCheck
- 5 Final Assessment of Qualification
- 6 EDC Final Payment

Developers of solar PV projects of all types and sizes, up to 5 MW per project, are welcome to apply via our online application portal. More information, and instructions to apply are available here.

Brought to you by

EVERSOURCE nationalgrid Unitil  
energy for life

DOER  
Massachusetts Department of Energy Resources

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# SMART Program Application Portals

There will be three portals: one each for:

- Eversource
- National Grid
- Unitil

Portals will be opened later in 2018 after the DPU SMART Tariff proceedings are completed and the SMART Program fully launches.

<https://MASmartSolar.PowerClerk.com>



PowerClerk



EVERSOURCE

NATIONAL GRID  
HERE WITH YOU. HERE FOR YOU.

UNITIL  
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## Applications for Block 1

This website portal will open for applications for Block 1 later this year. After the DPU establishes the SMART tariff, we will announce the opening date and provide further instructions on the application process. See <http://masmartsolar.com> for more info.

Log In

Username:

Password:

[Log In](#)

[Forgot Password?](#)

### SMART Solar Block Status Update

Last Update: 6/15/2018 4:15PM

Electric Distribution Company (EDC)	Size Group	Current Block	Block/Size Group (MW) <sup>1</sup>	Allocated Capacity (MW) <sup>2</sup>	Pending Capacity (MW) <sup>3</sup>	Accepting Applications for Block <sup>4</sup> :
Eversource MA East	Small	1 of 8	18,303	0.000	0.000	1
Eversource MA East	Large	1 of 8	73,211	2.000	0.000	1
Eversource MA West	Small	1 of 8	3,147	0.000	0.000	1
Eversource MA West	Large	1 of 8	12,588	7.700	0.000	1
National Grid (Massachusetts Electric)	Small	1 of 8	18,004	0.000	0.000	1
National Grid (Massachusetts Electric)	Large	1 of 8	72,018	43.573	0.000	1
National Grid (Nantucket)	Small	1 of 2	0.804	0.000	0.000	1
National Grid (Nantucket)	Large	1 of 2	2,417	0.000	0.000	1
Unitil	Small	1 of 4	0.789	0.000	0.000	1
Unitil	Large	1 of 4	3,158	0.000	0.000	1

Note 1: The Block/Size Group MW values are estimated using the minimum Small Block set-aside percentage (20%) of the total capacity available for each block, per DDER regulations. Up to 35% can be allocated to small systems in any given block. Therefore, depending upon demand, these values may be adjusted as the blocks fill independently of each other.  
 Note 2: Allocated Capacity (MW) is the total of Applicants that have been issued a Statement of Qualification.  
 Note 3: Pending Capacity (MW) is the total applications submitted but not yet approved or assigned to a block. Some of this capacity may be moved to the next Block, as the current Block fills.  
 Note 4: Assuming that all the Pending Capacity is approved, this is the estimated Block where new applications will be assigned.

### HOW TO PARTICIPATE



# SMART Program Application Portal

## Basic Steps to Complete a SMART Program Statement of Qualification Application

<https://MASmartSolar.PowerClerk.com>

1. Log on to existing account (or create new one)
2. Select “Small” ( $\leq 25$  kW) or “Large” system
3. Complete the online forms
  - a. EDC info, copy of electric bill, rate code, & account number
  - b. Applicant, System Owner, Customer of Record (with utility), and the Installer contact info
  - c. Site information including land use characteristics
  - d. PV project details including metering account type
  - e. Adder details, if applicable
4. Upload required documents in pdf, jpeg, or similar formats (5 MB limit / document)
5. Electronically sign the certification form
6. Pay application fee via credit card
7. Submit application
8. Receive acknowledgement & Receipt

PowerClerk is the communication tool for all Applications!

You will receive updates via PowerClerk at key milestones.

Applicants can always log on to check Application status.



# Requirements for the SMART Small Systems Online Application

Installers/Developers are strongly encouraged to have all these documents and signatures ready in advance of the program launch.

## Key required documentation and information for the Small System SMART Application includes:

### Small Systems ( $\leq 25$ kW AC)


- Contact information for:
  - Applicant
  - System Owner
  - Utility Customer of Record
  - Installer / Developer
- Copy of executed contract between installer and customer
- Customer Disclosure Form
- Copy of the electric utility bill & account number
- Input key PV system specifications and quantities
- Certification form regarding terms & conditions
- Application Fee (payable online via credit card)

### IF APPLICABLE:

- Copy of executed PPA/Lease if the system is third party owned
- Documentation of low income residential utility rate (utility bill)
- Energy storage plans & specifications





# SMART Program Application Demo

Solar  
Massachusetts  
Renewable  
Target  
SMART Program



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PowerClerk



HERE WITH YOU. HERE FOR YOU. energy for life

Log In

Username:

Password:

[Forgot Password?](#)

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## Applications for Block 1

This website portal will open for applications for Block 1 later this year. After the DPU establishes the SMART tariff, we will announce the opening date and provide further instructions on the application process. See <http://masmart.solar.com> for more info.

**Program Links**

[SMART Program General Information](#)

[SMART Program Regulations](#)

Block	Distribution Company	Available Capacity (MW)
1	Eversource - NSTAR	89.514
1	Eversource - WMECO	8.025
1	National Grid - MECO	46.449
1	National Grid - Nantucket	3.021
1	Unitil - Fitchburg	3.947

# Requirements for the SMART Large Systems Online Application

Developers are strongly encouraged to have all these documents and signatures ready in advance of the program launch.

## Required documentation and information for Large System(> 25 kW AC but ≤ 5,000 kW AC) Applications:

The same as Small System requirements, as applicable, PLUS:

- Copy of valid, fully executed Interconnection Services Agreement with the applicable electric utility
- Evidence of site control and/or permission to build from owner
- Customer Disclosure forms are only required for Community Solar projects and will be collected at project completion
- All non-ministerial permits that may be applicable
  - ZBA rulings, Conservation Commission votes, etc.
  - Landfill or Brownfield permits or certifications
  - MA DEP, MA Fish & Game, MA Dept. of Agricultural, etc., permits

Also, IF APPLICABLE the following will be required:

- Any STGU seeking an adder will be required to provide eligibility documentation demonstrating their qualification for the adder
  - Off-Taker agreements & documents; Payment Credit Transfer Form
  - Plans and/or specs documenting Canal, Canopy, Building Mount, etc.
- PURPA Requirements / FERC QF filing, if applicable (≥ 1 MW)
- Land use documentation for ground mounted projects > 500 kW
  - Evidence of local zoning regulation for large ground mounted systems
  - Evidence supporting prior development claims, if applicable
- Energy Storage plans & specifications

# Block Management Process

There are 5 EDCs therefore 5 sets of Blocks  
 Each Block has 20%-35% set-aside for Small Systems

SMART Solar Block Status Update						
	Last Update	6/15/2018	4:15 PM			
Electric Distribution Company (EDC)	Size Group	Current Block	Block/Size Group (MW) <sup>1</sup>	Allocated Capacity (MW) <sup>2</sup>	Pending Capacity (MW) <sup>3</sup>	Accepting Applications for Block <sup>4</sup> :
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Unitil	Small	1 of 4	0.789	0.000	0.000	1
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NOTE 1: The Block/Size Group MW values are estimated using the minimum Small Block set-aside percentage (20%) of the Total Capacity Available for each block, per DOER regulations. Note that up to 35% can be allocated to Small systems in any given block. Therefore, depending upon demand, these values may be adjusted as the Blocks fill independently of each other.						
Qualification.						
NOTE 3: Pending Capacity (MW) is the total Applications submitted but not yet approved or assigned to a Block. Note that some of this capacity may be moved to the next Block as the current Block fills.						
NOTE 4: Assuming that all the Pending Capacity is approved, this is the estimated Block where new applications will be assigned.						

# Block Management Process (continued)

## **As Blocks fill: immediately transition to next Block**

- The 5 EDC territories fill and transition independently
- Small and Large fill and transition independently

## **80 MW Tranches for Adders; Independent of Blocks**

### **Special Rules for “Week One”:**

- Portal will open Day 1 during normal business hours (EST)
- No timestamps on Week One (1<sup>st</sup> five business days)
- Only complete, eligible projects will be in the queue
- Large projects: to be ordered by ISA execution date
- Small projects: ordered by contract execution date
- Tiebreaker rules will be applied if necessary
- Program portal will be primary means of communication

### **There is No Need to Rush on Week One!**

### **Process after “Week One”:**

- Portal will remain open 24/7 and all will be time stamped
- Status reports to be posted on PowerClerk homepages

# SMART Program

## Review and Recommendation Process

- Complete and accurate applications will be processed on a “first come; first served” basis
  - CLEAResult reviews completed applications
  - If upon review, submittal is deemed inaccurate, incomplete, or ineligible, Application may be suspended or denied if necessary
  - Minor irregularities will have a 10 day “cure period” to correct without losing place in queue
- CLEAResult to manage Blocks & Tranches
  - Assignments to Blocks “first come; first served”
  - Regular reporting on status after “Week One”
- Applications & rates recommended to DOER
- DOER issues the preliminary Statement of Qualification (SQ)
- SQ has 12 month Reservation Period to complete installation and interconnection
- Project changes or extension requests may incur additional fees

# SMART Completion and Incentive Claim Process

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# SMART Program

## Project Completion and Incentive Claim Process

- Applicant logs on to PowerClerk
  - Enter completion information data
  - Submit changes, if applicable
  - Update EDC account # / ISA # as applicable
  - Evidence of Generation meter and meter #s
  - Other info as required by EDCs or DOER
- Upload any required documents
  - Civil engineering performance standards compliance
  - Permission to Interconnect (for  $\leq 25$  kW projects – this is done at project completion)
  - Off-Taker data and documents
  - Tariff Enrollment Form
  - Payment To info: (check or EFT; account #; address; etc.)
  - W-9 / Tax ID information
- DOER issues Final Statement of Qualification
- Completed project data transferred to EDCs
  - Expect monthly payments (subject to DPU ruling)
- Post-Claim requirements
  - Energy Storage results after 12 months
  - Off-Taker membership updates at least annually
  - Agricultural crop production productivity annually



## Solar Program Administrator information:

- 888-989-7752
- [masmartsolar@cleareresult.com](mailto:masmartsolar@cleareresult.com)
- Sam Nutter, Program Director
- Dana Robert Beale, Program Manager

# Thank You

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