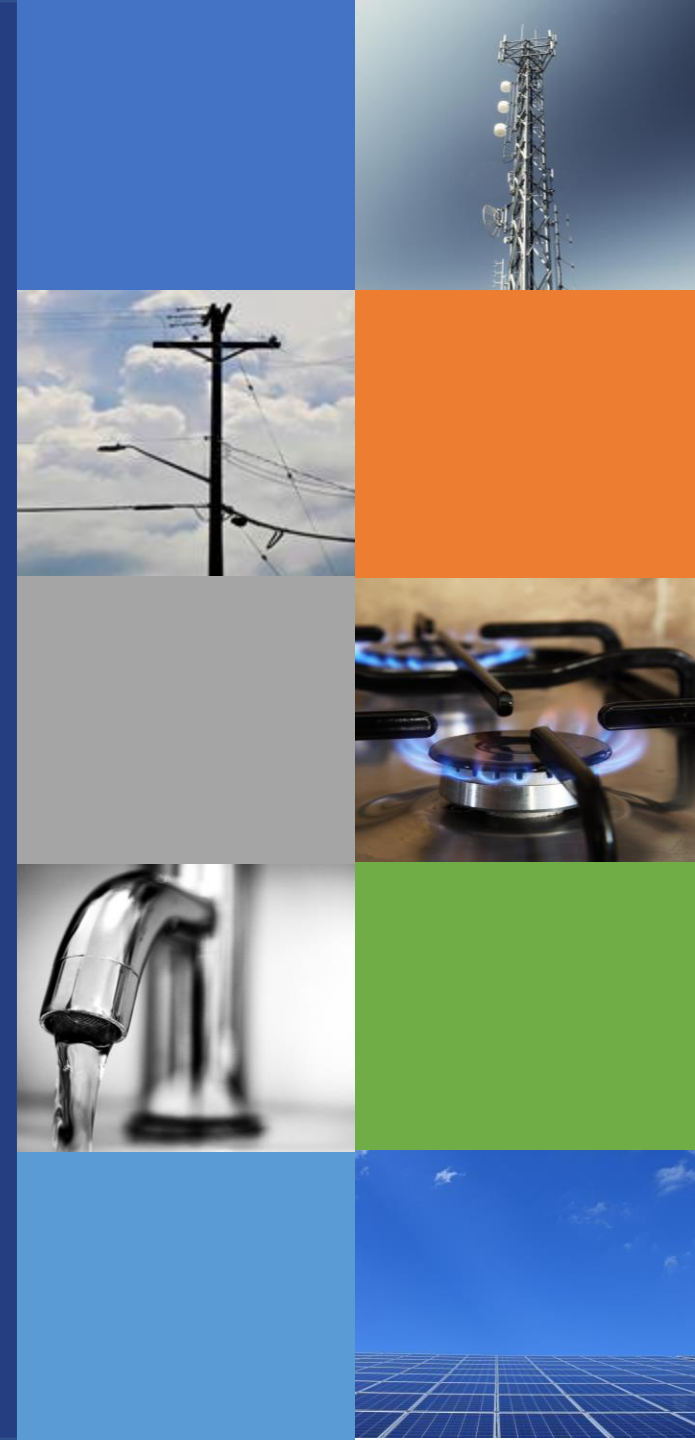




Connecticut Residential Renewable Energy Solutions Program – What Every Installer Needs to Know

Annual RRES Program Review – Contractor Education and Enforcement

January 30, 2025
Hosted by SEIA
Docket No. 2x-08-02RE01



Jamie Spannhake, EOE Staff Attorney

- **Overview of Annual Docket: XX-08-02RE01**
 - **Known as the Contractor Enforcement Docket**
- **Compliance Filing Requirements: What, Where, & How**
- **Common Errors to Avoid**
- **Disciplinary Framework**
- **Q&A**

Contact: Jamie.Spannhake@ct.gov



Overview of Annual Contractor Enforcement Docket

The **Contractor Enforcement Docket** arose from **Docket No. 23-08-02**, Annual Residential Renewable Energy Solutions Program Review – Year 3. The compliance filing requirements and reasons for them are provided in the **Final Decision** dated Nov. 3, 2023, in Section IV.D. (pages 22-28) and **Orders No. 33 and No. 34**.

Why the Contractor Enforcement Docket?

- (1) Improve customer protections and disclosures** so that customers make informed decisions based on accurate information.
- To determine whether and **how much participants financially benefit** from RRES program participation.
- (3) Address any complaints** brought to the Authority's attention during the previous calendar year regarding the RRES Program.
- Enable EOE to conduct a **review of marketing and training** materials from RRES contractors.

Who must comply? Solar Contractors, including Installers, Sales Companies, and Developers

Annual Compliance Filing Requirements

WHEN TO FILE

- By April 1 annually*

WHERE TO FILE: in the annual Contractor Enforcement Docket

- 23-08-02RE01 for materials used & projects completed in 2023, were due in June 2024
- **24-08-02RE01 for materials used & projects completed in 2024, are due April 1, 2025**
- 25-08-02RE01 for materials used & projects completed in 2025, will be due April 1, 2026
- And so on: XX-08-02RE01

WHAT TO FILE

- Marketing and Training documents as compliance
- Financial Benefits documents as compliance
- Motions for Protective Order (if needed) as a motion

* 2023 documents were not due until June 1, 2024, because it was the first year; all future years, filings are due by April 1.



Compliance Filing Requirements: What to File - Overview

Marketing and Training Materials (Order No. 33)

1. Marketing Materials
2. Training Materials



Financial Benefits Documents (Order No. 34)

1. Customer Disclosure Forms
2. Financial Benefits Summary Sheet
(an unlocked EXCEL file with 8 columns of specific information)
3. Financial Benefits Sheet Narrative (a Word document or PDF)



AND A COVER LETTER – PLEASE!

Marketing & Training Materials (Order No. 33)

TWO CATEGORIES OF FILINGS:

1. All **marketing materials** used for solar projects in the past calendar year, such as brochures, advertisements, social media posts and ads, flyers, etc. This includes marketing scripts.
2. **Training materials** used to train anyone who engages with a customer or potential customer and on a topic relevant to sales, marketing, and other customer facing topics.

WHAT IF you don't have marketing and/or training materials? Include this information in your **COVER LETTER** stating you do not have materials responsive to the requirement.

A photograph of a courtroom with a blue overlay containing text. The courtroom features wooden paneling, a central aisle, and several rows of blue chairs. The text is centered in white on the blue overlay.

**Any questions about
Marketing & Training
Materials?**



Financial Benefits Documents (Order No. 34)

3 categories of
documents...

FIRST Financial Benefits Document:

Customer Disclosure Forms for all projects completed, i.e. received PTO, in the past calendar year. So, for compliance filings in April 2025, that will be all projects completed in calendar year 2024.

- PURA ruled in Dkt No. 23-08-02RE01 that you can publicly file **EITHER redacted completed customer disclosure forms OR blank forms** of every version of customer disclosure form you utilized.
- We will discuss confidentiality and redactions later in this presentation.

Financial Benefits Documents (Order No. 34)

3 categories of
documents...

SECOND Financial Benefits Document:
[Financial Benefits Summary Sheet \(the Summary\)](#) for all projects completed in the prior calendar year as an **unlocked Excel file** with 8 columns of information:

1. site address;
2. utility account number associated with the project;
3. annual contract rate increase amount;
4. estimated year one production (kWh) as a percentage of estimated annual utility customer usage (kWh);
5. estimated year one customer net savings;
6. starting utility rate used to estimate net year one savings;
7. estimated net savings over the RRES tariff term (i.e., 20 years); and
8. utility rate used to estimate net savings over the RRES tariff term (i.e., 20 years).

We will discuss confidentiality and redactions later in this presentation.



Financial Benefits Documents (Order No. 34)

3 categories of documents...

THIRD Financial Benefits Document:

Financial Benefits Sheet Narrative (the Narrative) is a narrative explanation of any calculation methodologies included in the Financial Benefits Summary Sheet.

- may be a simple summary document (e.g., as brief as a couple of pages)
- outlining the methodology used to calculate the info in the Financial Benefits Summary Sheet
- along with a general list of the documents needed for such calculations (e.g., a customer's electric bill and sales contract are needed to verify the methodology for the fourth requirement, etc.).

PURA ruled that this document is not confidential.



Any questions about the Financial Benefits Documents?

1. Customer Disclosure Forms
2. Financial Benefits Summary Sheet (the Summary)
3. Financial Benefits Sheet Narrative (the Narrative)

Confidentiality and Document Redactions

- Confidentiality determinations are based on the Freedom of Information Act (FOIA), with a presumption of public filing.
- When you believe information should be kept confidential, i.e. not filed publicly in the docket, you must:
 - Redact (black out) **only** the confidential info in the document
 - File the **redacted** document publicly in the docket **as compliance**
 - Submit the **unredacted** document to PURA's Executive Secretary Jeff Gaudiosi via email to PURA.ExecutiveSecretary@ct.gov
 - contemporaneously with the motion for protective order
 - The email's subject line AND each page of the documents must state in all capital letters "CONFIDENTIAL MATERIAL - NOT FOR PUBLIC DISCLOSURE."
 - File a **Motion for Protective Order** publicly in the docket **as a motion**



Motions for Protective Order

File a **Motion for Protective Order** publicly in the docket as a motion

- must provide **specific legal arguments** with reference to state or federal law
- with **supporting facts** showing why the information should be kept confidential
- with a **certified affidavit**
 - You can find examples of proper motions and affidavits in Docket No. 23-08-02RE01.



For Docket No. 24-08-02RE01, PURA has stated that if you properly file a motion and redact only the information as stated in the Notice dated Aug. 28, 2024 (in Docket No. 23-08-02RE01), you can assume your motion is granted unless you hear otherwise. Docket No. 24-08-02RE01 Notice of Proceeding, Oct. 1, 2024.

NOT CONFIDENTIAL

1. Marketing Materials
2. Blank Customer Disclosure Forms
3. Narrative

File the materials publicly in the docket as compliance.

PORTIONS MAY BE CONFIDENTIAL

1. Training Materials
2. Completed Customer Disclosure Forms
3. Summary

- file the redacted copy publicly as compliance,
- submit the unredacted documents via email to PURA's Executive Secretary, and
- file a motion for protective order publicly as a motion.

Guidance re Confidentiality

YOU HAVE TWO OPTIONS FOR FILING CUSTOMER DISCLOSURE FORMS and both require that you submit unredacted customer disclosure forms via email to PURA's Executive Secretary.



Blank Customer Disclosure Forms are not confidential.

There should be no redactions (black outs) of any portion of a blank customer disclosure form.



If you file blank customer disclosure forms publicly as compliance, you still need to submit the completed unredacted customer disclosure forms via email to PURA's Executive Secretary.

Completed Customer Disclosure Forms may contain some confidential info. PURA has ruled that you cannot redact system size and production information. PURA also ruled that you can redact:

- customer names, addresses, phone numbers, email, and account numbers.
- a specific project's purchase price, lease rate, down payment amount, estimated payments, net savings, and utility and escalator rates.




If you file redacted Customer Disclosure Forms, then you need to:

- file the redacted documents publicly as compliance,
- submit the unredacted documents via email to PURA's Executive Secretary, and
- file a motion for protective order publicly as a motion.

Guidance re Confidentiality

For Financial Benefits Summary and Narrative (Order No. 34)

The Narrative is not confidential. There should be no redactions (black outs) of any portion of the Financial Benefits Sheet Narrative (the Narrative).



Because the Narrative is not confidential, you only need to file the document publicly in the docket as compliance.

The Summary contains some info that may be confidential and some that is not confidential.

PURA ruled that you **cannot redact system size and production information**. PURA also ruled that the following info **can be redacted** from the Financial Benefits Summary Sheet:

- customer names, addresses, phone numbers, email, and account numbers.
- a specific project's purchase price, lease rate, down payment amount, estimated payments, net savings, and utility and escalator rates

In other words, you may redact only columns 1-3 and 5-6 of the Summary. You are not required to redact any information, but you may.



If your Summary contain redactions (black outs), then you need to:

- file the redacted copy publicly as compliance,
- submit the unredacted document via email to PURA's Executive Secretary, and
- file a motion for protective order publicly as a motion.



Guidance re Confidentiality

For Marketing & Training
(Order No. 33)

Relevant sources:

- Docket Notice, Aug. 28, 2024
- Decision on Motion Nos. 31 and 32, Sept. 24, 2024



Marketing Materials are not confidential. There should be no redactions (black outs) of any portion of marketing materials.



Because Marketing Materials are not confidential, you only need to file the materials publicly in the docket as compliance.

Training Materials generally are not confidential; however, on a case-by-case basis:

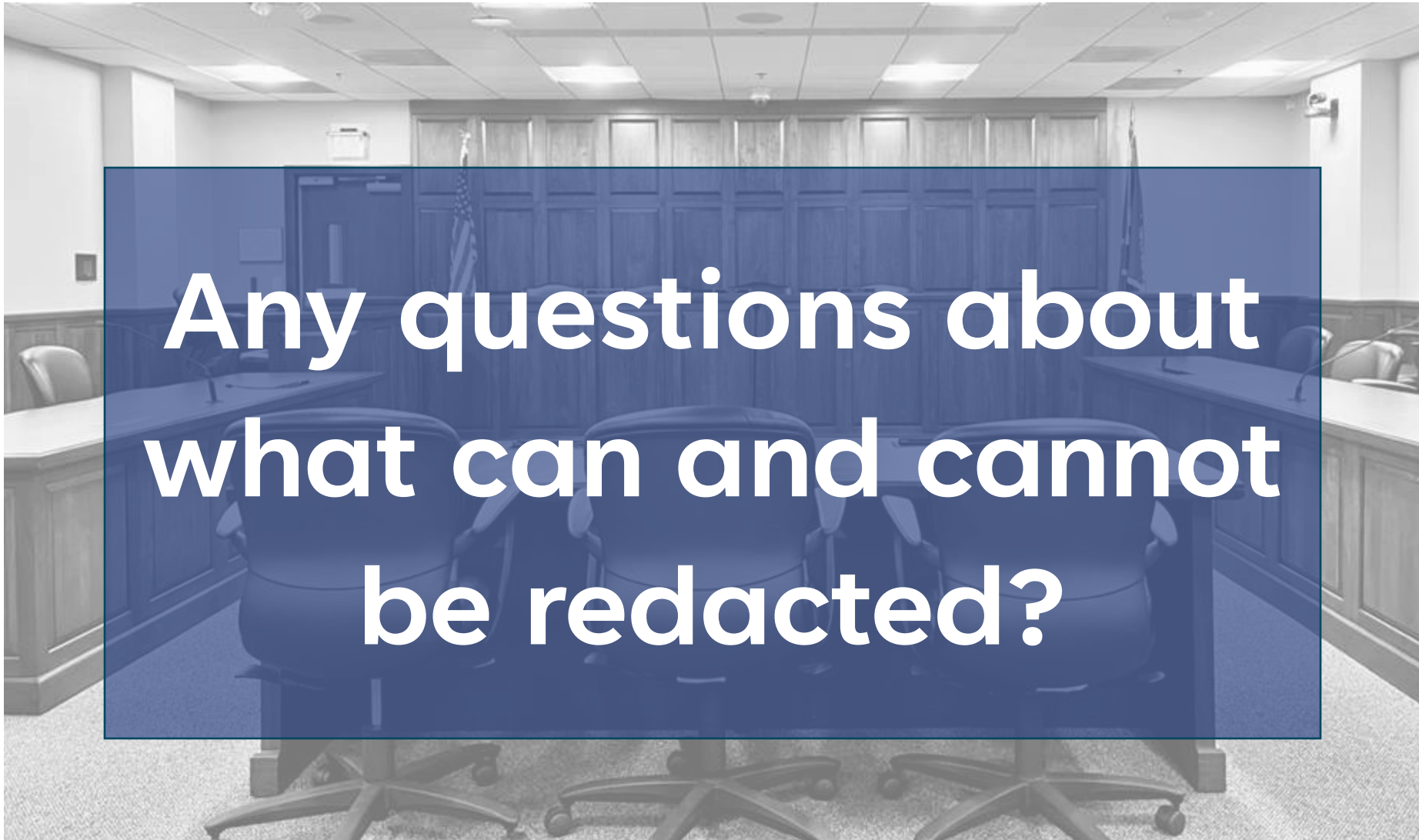
proprietary or trade secret information that is wholly internal to the company and will not in any way be shared with the public or the customer may be confidential.

e.g. regarding internal proprietary software or internal business planning



If Training Materials contain redactions (black outs), then you need to:

- file the redacted copy publicly as compliance,
- submit the unredacted documents via email to PURA's Executive Secretary, and
- file a motion for protective order publicly as a motion.



**Any questions about
what can and cannot
be redacted?**



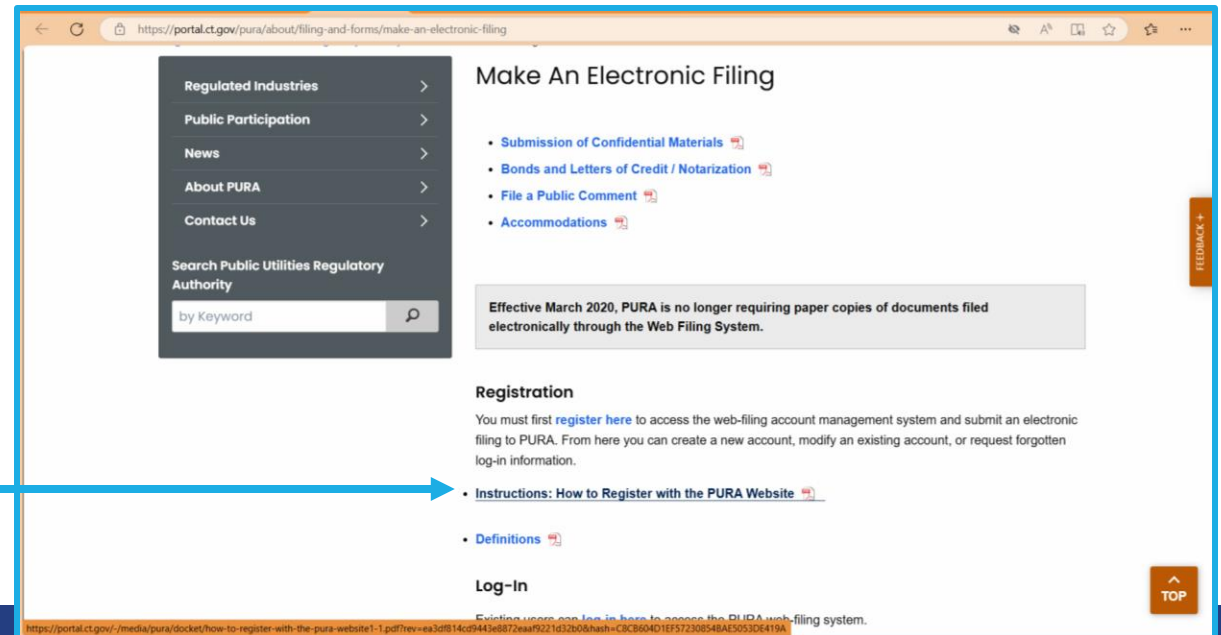
GETTING READY TO FILE

Gather your documents:

- Cover letter (doc or PDF)
- Marketing materials (PDF)
- Training materials (PDF)
- Customer disclosure forms (PDF)
- Financial Benefits Summary (Excel)
- Financial Benefits Narrative (doc or PDF)
- Motions for Protective Order (doc or PDF)
 - With affidavit

Create your PURA filing account if you haven't already

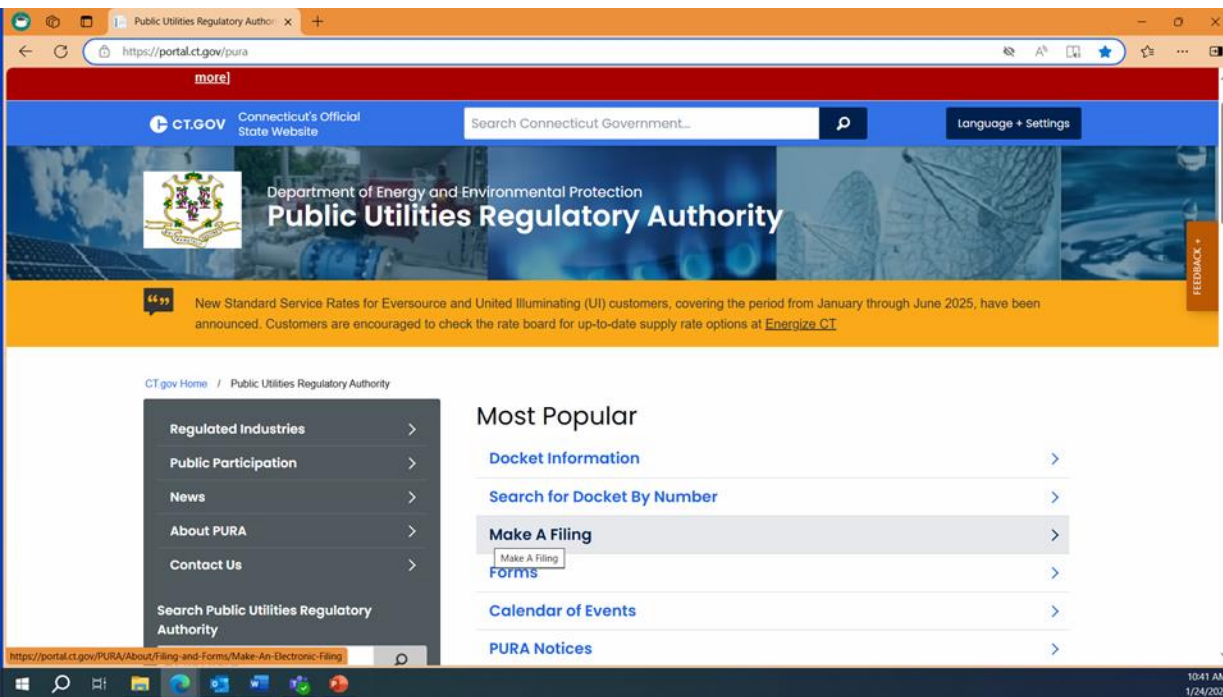
- Visit: <https://portal.ct.gov/pura>
- Click on "Make A Filing"
- On the [Make An Electronic Filing](#) page: scroll down to the instructions for How to Register with the PURA Website.



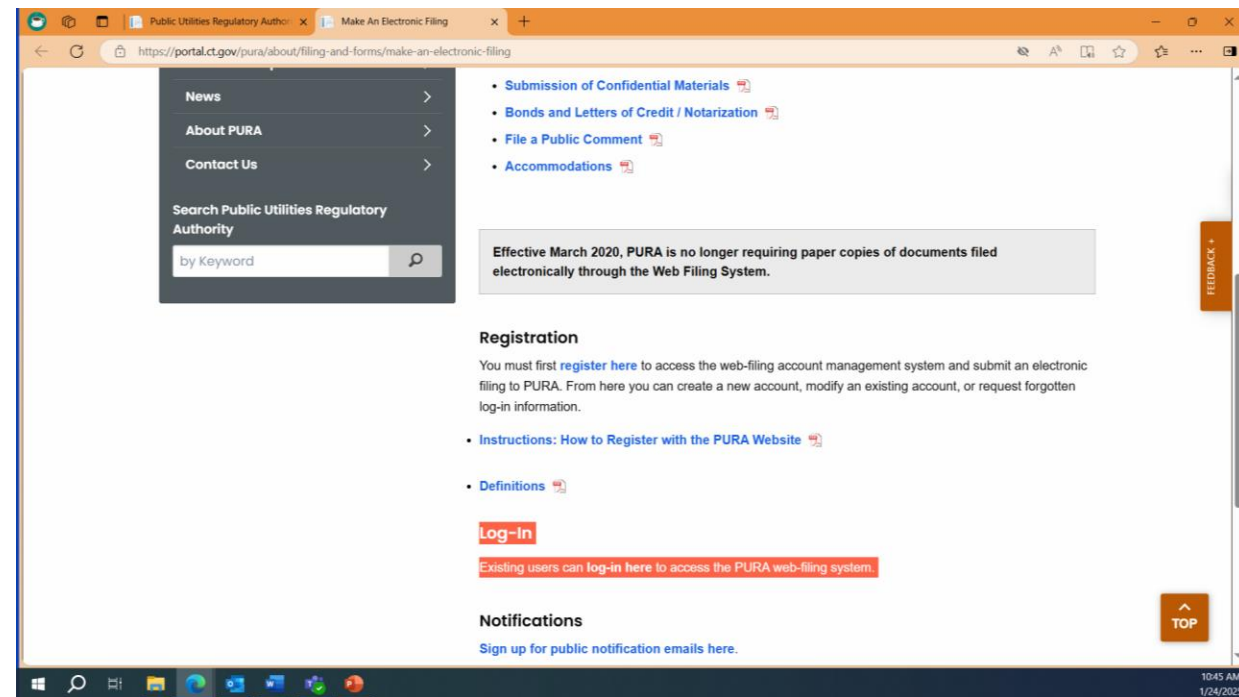
Accessing the filing portal

<https://portal.ct.gov/pura>

“Make A Filing”



Scroll down to “Log-In” and click “log-in here”



FILING at the [PURA Web Filing – Start Page](#)

STATE OF CONNECTICUT
PUBLIC UTILITIES REGULATORY AUTHORITY

PURA Web Filing - Start Page

Step 1
If you are a new user, please read the Intro Information before proceeding. This will help you understand the layout of this system.
[Intro Information](#)

Step 2
You must have an account with the PURA before you can view or enter information into the Web Filing System. To register, modify, or retrieve forgotten log-in information click the link below.
[PURA Web Filing Account Management \(Registration, Modification, Forgotten Password\)](#)

Step 3
Please choose from one of the choices below once you have Steps 1 & 2 completed.

[File a New Docket Application](#) [Add to a Current Docket Filing](#) [Create an Undocketed Filing](#)

IMPORTANT NOTE – In order for PURA to deem filings as officially received, all documents attached to any web-filing must be filed as follows:

- Microsoft Office Word/Excel/PowerPoint 2010 (or higher) documents [no macro-enabled or template file types]
- Or Adobe PDF (text not image)
- Total size of filing must not exceed 20 MB (do **NOT** submit .ZIP files)

Under “**Step 3**” click **“Add to a Current Docket Filing”**

This will take you to the log-in page, where you will enter your User name and Password and “Sign In”

Please identify yourself:

User name:

Password:

Remember Me

[Forgot Username/Password?](#)



FILING at the PURA PORTAL (<https://portal.ct.gov/pura>)

Enter the Docket Number, which for this year is **24-08-02RE01**. Then Choose the Type of Filing.

Compliance (for all your compliance filings) or **Motions** (for motions for protective order)

STATE OF CONNECTICUT
PUBLIC UTILITIES REGULATORY AUTHORITY

DPUC Web Filing - Docketed Database Filings

Enter your Docket Number in the field below.
(Format: XX-XX-XX)
(Reopening: XX-XX-XXRE0X)

Docket Number:

Docket Title:
ANNUAL RESIDENTIAL RENEWABLE ENERGY SOLUTIONS PROGRAM REVIEW - YEAR 2024 - CONTRACTOR EDUCATION AND ENFORCEMENT

Choose the Type of Filing

[Don't know your Docket Number?](#)

STATE OF CONNECTICUT
PUBLIC UTILITIES REGULATORY AUTHORITY

DPUC Web Filing - Docketed Database Filings

Choose the Type of Filing

- Application
- Briefs
- Compliance
- Correspondence
- Interrogatories Issued
- Interrogatory Responses
- Late File Exhibits (LFE)
- Motions
- Objections/Comments on Motion
- Pre-filed Testimony
- Written Comments in response to a Notice
- Written Exceptions to a Draft Decision

ANNUAL RESIDENTIAL RENEWABLE ENERGY SOLUTIONS PROGRAM REVIEW - YEAR 2024 - CONTRACTOR EDUCATION AND ENFORCEMENT

Choose the Type of Filing

[Don't know your Docket Number?](#)

FILING at the PURA PORTAL (<https://portal.ct.gov/pura>)

An Electronic Filing x Compliance x +

RevDPUCElectronicFiling.nsf/Compliance?OpenForm&DocketNumber=24-08-02RE01&WhichDB=Active&DocketTi

Compliance

Docket Number:	24-08-02RE01
Docket Title:	ANNUAL RESIDENTIAL RENEWABLE ENERGY SOLUTIONS PROGRAM REVIEW - YEAR 2024 - CONTRACTOR EDUCATION AND ENFORCEMENT
On Behalf Of What Entity:	
Contact Name:	Jamie J. Spannake
Telephone No.:	(860) 827-2674
E-mail Address:	jamie.spannhake@ct.gov
Submitter of Filing:	Office of Education, Outreach & Compliance
Pertains To What Entity:	
Date Filed:	01/24/2025 11:09:33 AM
Price Filing:	<input type="radio"/> No <input type="radio"/> Yes
Indicate Order # (s):	
Description:	
Compliance Date:	01/24/2025

Attach your documents here:

Choose File No file chosen

NOTE - Only attachments that have the following file extensions will be considered as officially received by PURA:

- .doc, .docx
- .pdf
- .xls, .xlsx
- .jpg, .jpeg, .jpe, .jfif
- .mpeg, .wav, .mp3

Submit Form

Filing page for a compliance filing.

Confirm the correct **Docket**.

“On Behalf of What Entity”:

- information about your company: Company name, contact at the company, phone & email, **“Submitter of Filing”** is the person or entity submitting the documents, and **“Pertains to What Entity”** is your company. (Accept any pre-population as accurate.)

Order #(s): 33 (marketing & training) or 34 (financial benefits docs)

- Can file separately or together

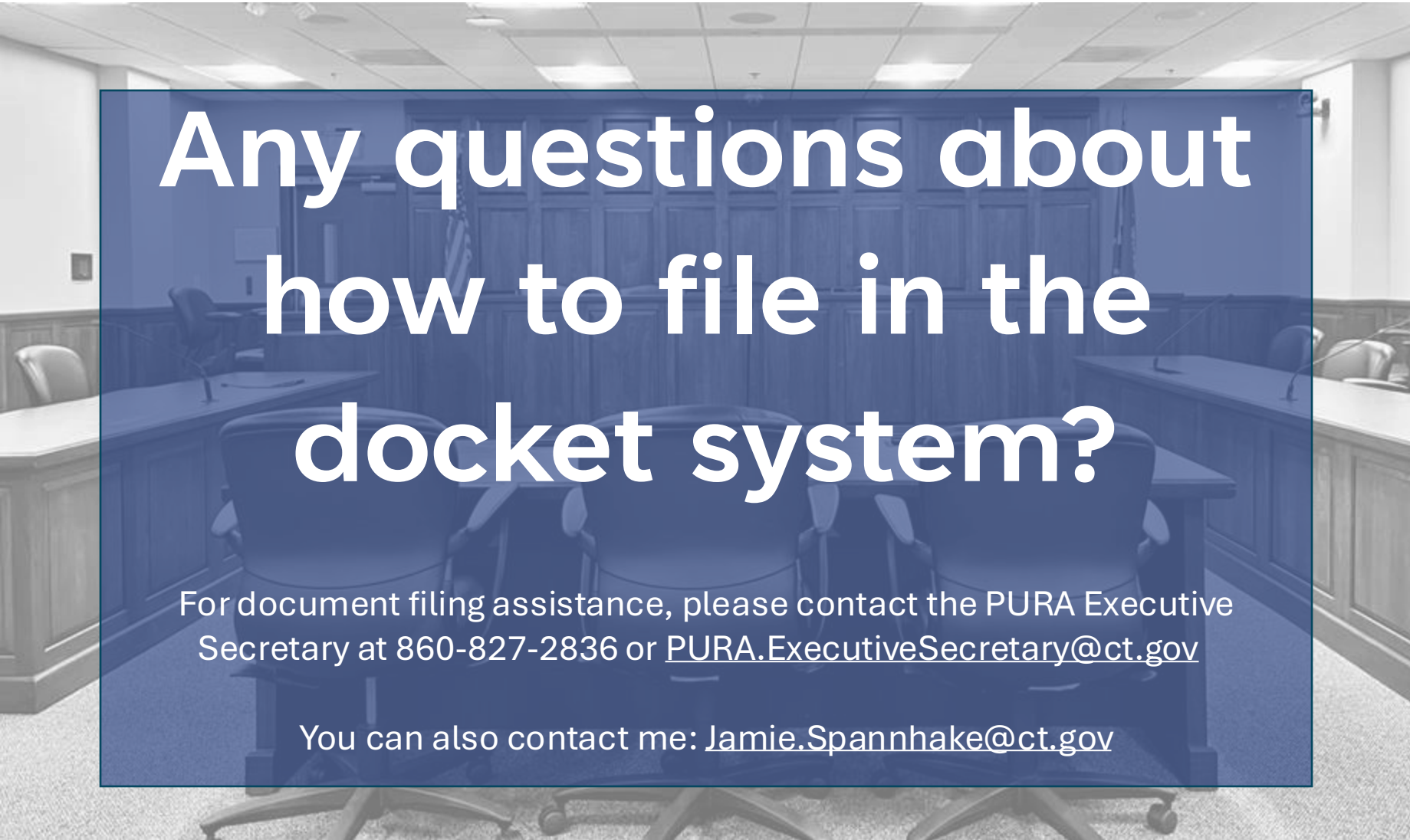
Description: Marketing, Training, Financial Benefits, Compliance, etc.

Choose File to upload

SUBMIT FORM

You will get a confirmation of filing that you should keep for your records.





Any questions about how to file in the docket system?

For document filing assistance, please contact the PURA Executive Secretary at 860-827-2836 or PURA.ExecutiveSecretary@ct.gov

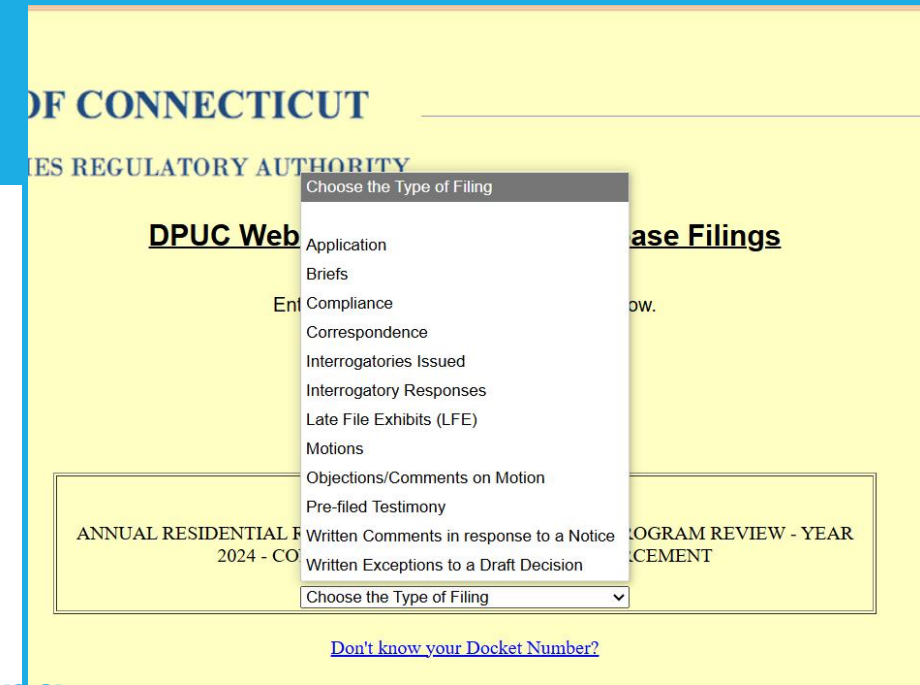
You can also contact me: Jamie.Spannhake@ct.gov

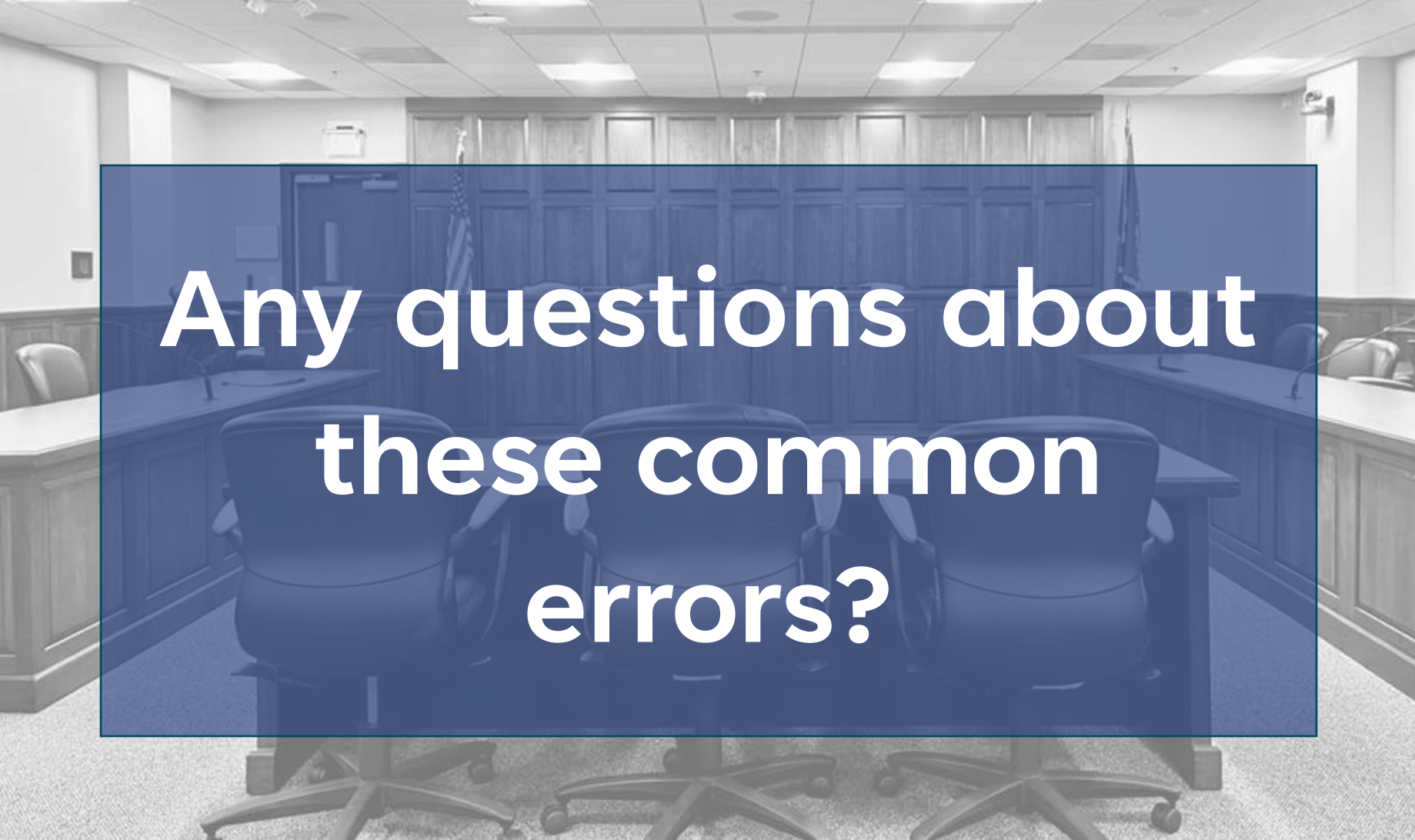
**For technical issues,
contact DEEP IT at 860-424-3882 or
Deep.Helpdesk.Footprints@ct.gov**



Common Errors to Avoid

- **DO NOT FILE** compliance docs as correspondence or something other than compliance
 - **INSTEAD:** File compliance documents as compliance, not as correspondence or some other document
- **DO NOT FAIL** to file anything explaining that you don't have responsive documents
 - **INSTEAD:** File a letter as compliance stating that you don't have any documents, e.g. we don't have marketing materials, we don't use training materials, we didn't complete any projects in 2024, etc.
- **DO NOT ATTACH** redacted documents to your motion for protective order
 - **INSTEAD:** File redacted documents as compliance and refer to the documents in your motion for protective order
- **DO NOT FILE** your motion for protective order as correspondence or compliance
 - **INSTEAD:** File your motion for protective order as a motion with a supporting affidavit
- **Remember:** if you file redacted documents, you **MUST** also submit contemporaneously the unredacted documents to PURA's Executive Secretary **AND** file a motion for protective order as a motion with a supporting affidavit in the docket.



A photograph of a courtroom with a blue overlay containing text. The courtroom features wooden paneling, a central aisle, and several rows of blue chairs. The text is centered in white on the blue overlay.

**Any questions about
these common
errors?**



Disciplinary Framework: Four-Strike System

Established in Dockets No. 20-07-01 and No. 23-08-02*

Four-strike system for enforcing the RRES program rules and addressing violations.

- First strike is a warning with no further ramifications.
- Second strike may result in a six-month ban from the RRES program.
- Third strike may result in an 18-month ban from the RRES program.
- Fourth strike may result in a permanent ban from the RRES program.

Administered by EOE

EOE may recommend the assessment of multiple strikes for a single audit (i.e. each year) if multiple violations are identified, particularly if they are severe.

*Docket No. 20-07-01, Interim Decision, Feb. 10, 2021, [PURA Implementation of Section 3 of P.A. 19-35, Renewable Energy tariffs and Procurement Plans](#), p. 27; and Docket No. 23-08-02, Final Decision, Nov. 1, 2023, [Annual RRES Program Review – Year 3](#), pp. 24-28.

Disciplinary Framework: Four-Strike System

- EOE has discretion to determine when to issue strikes and how many to issue for each violation
- Violations include:
 - breaches of the RRES Program Manual
 - clearly deceptive or misleading marketing practices, as determined by EOE
 - failure to comply with the compliance filing obligations each year
 - not responding to additional requests for information issued by EOE



Jamie Spannhake, EOE Staff Attorney, Jamie.Spannhake@ct.gov





Jamie Spannhake, EOE Staff Attorney, Jamie.Spannhake@ct.gov



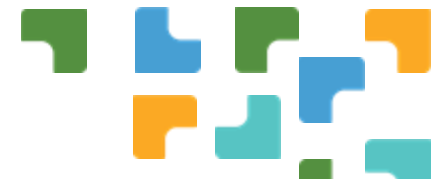
RRES Annual Compliance Filing Webinar

Kyle Wallace

VP, Public Policy & Government Affairs

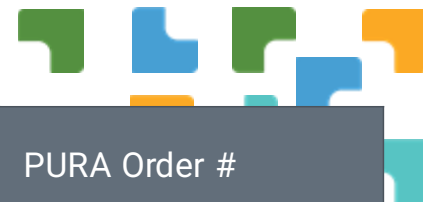
January 30, 2025

General Tips For Installers



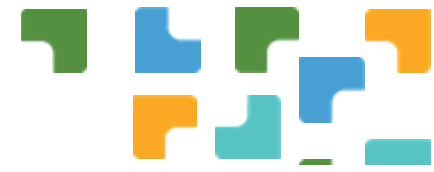
- Start gathering information as early as possible. It will likely take coordination from multiple internal teams to gather all of the necessary information.
- The first filing is the hardest. Once you have been through the process, you will have templates and future years should be easier.
- Use it as a learning opportunity. You may discover gaps or inconsistencies in your processes or materials that are worth correcting.
- If you have questions on the requirements, reach out to EOE. If you have questions on the mechanics of filing, call PURA - they are happy to help.
- If you're uploading a large number of documents (disclosure forms or marketing), don't try and upload them in the online submission. Upload a few and then have the PURA clerk help with the rest.
- Future changes to the Annual Compliance Filing would be explored in the RRES Annual Review Docket (docket format 2X-08-02), which you can participate in. Final Decisions typically are issued in November of each year.

****All filings made in Docket 24-08-02RE01****



Item	Filing Type: Motion or Compliance	Confidential Treatment	Notarized?	PURA Order #
Cover Letter & Certificate of Service - Motion	With Motion	No		N/A
Motion for Protective Order	With Motion	No		N/A
Proposed Protective Order & Nondisclosure Agreement	With Motion	No		N/A
Motion Affidavit	With Motion	No	Yes	N/A
Cover Letter & Certificate of Service - Compliance	Compliance Filing	No		N/A
All Disclosure forms for Projects Completed in 2024	Compliance Filing	Yes ; except for production and system size		Order No. 34
Sales Training Scripts	Compliance Filing	No, must be filed publicly		Order No. 33
Marketing Materials	Compliance Filing	No, disseminated to the public		Order No. 33
Financial Benefits Summary Sheet	Compliance Filing	Yes , except columns for system size, estimated production, and extrapolated 20 year savings and utility rate		Order No. 34
Financial Benefits Narrative	Compliance Filing	No		Order No. 34

Order establishing requirements: [Final Order - Docket 23-08-02](#)



Motion for a Protective Order

- The Motion for a Protective Order **does not** need to be written or filed by an attorney, but can be. However, it must contain specific legal arguments with supporting facts on why the information should be confidential.
- What are the possible relevant legal arguments for confidentiality under CT's FOIA Statute ([General Statutes § 1-210](#))?
 - **(b)(2)** Protection of customer personal identifying information
 - **(b)(5A)** Trade secrets which may include “formulas, patterns, compilations, programs, devices, methods, techniques, processes, drawings, cost data, customer lists...” from which economic value can be derived from their disclosure and where the business takes reasonable steps to maintain secrecy.
 - **(b)(5B)** Commercial or financial information given in confidence and not required by statute.
 - **(b)(20)** Records of standards, procedures, processes, software and codes, not otherwise available to the public, the disclosure of which would compromise the security or integrity of an information technology system.
- The accompanying affidavit **must** be notarized. Must also include a Proposed Protective Order and Nondisclosure Agreement.



Motion

- [Example 1](#)
- [Example 2](#)
- [Example 3](#)

Affidavit

- [Example 1](#)
- [Example 2](#)
- [Example 3](#)

Proposed Protective Order

- [Example 1](#)
- [Example 2](#)
- [Example 3](#)

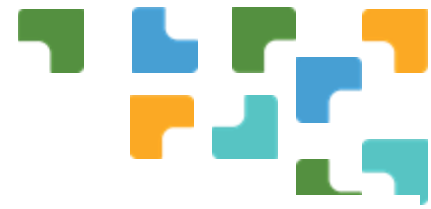
Treatment of Confidential Material



- For any documents that contain confidential material that is covered by your Motion for a Protective Order you will need to:
 - Unredacted versions emailed directly to PURA Executive Secretary (jeff.gaudiosi@ct.gov)
 - Subject line **must** say “CONFIDENTIAL MATERIAL - NOT FOR PUBLIC DISCLOSURE” and the docket number.
 - **Each page of the documents should include a header** that says “CONFIDENTIAL - NOT FOR PUBLIC DISCLOSURE”
 - For large files, you can utilize Dropbox or Google Drive folders.
 - Redacted versions should be filed as a compliance filing in the docket.
 - **Ensure that your redactions are actually redacting the information!**
 - Do not use MS Paint or other software to put black marks over the text, this will not remove the information.
 - Programs such as Adobe Acrobat have a redact feature.
 - For spreadsheets, delete the underlying data in the redacted file version and cover with black fill for those cells.

Confidential and public version should be filed at the same time as the Motion for a Protective Order!

Treatment of Confidential Material



CONFIDENTIAL MATERIAL - NOT FOR PUBLIC DISCLOSURE - Docket No. 23-08-02RE01 - PosiGen External Inbox x

Summarize this email



Kyle Wallace <kwallace@posigen.com>
to Jeff.Gaudiosi

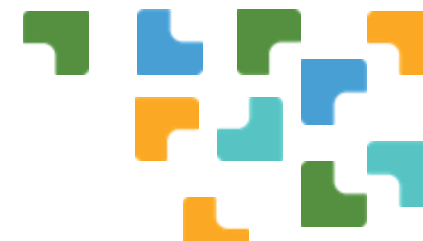
Hello,

A Motion for a Protective Order has been filed in Docket 23-08-02RE01. The unredacted confidential materials covered by the Motion are in this [folder link](#). Please let me know if you have any questions or have issues accessing the documents.

Thank you,

CONFIDENTIAL - NOT FOR PUBLIC DISCLOSURE	
Summary Sheet Column	Explanation
Site Address	N/A
Utility Account Number	N/A
Estimated Year 1 Solar Production	The estimated first year production of the system.

Financial Benefits Summary Sheet



CONFIDENTIAL - NOT FOR PUBLIC DISCLOSURE

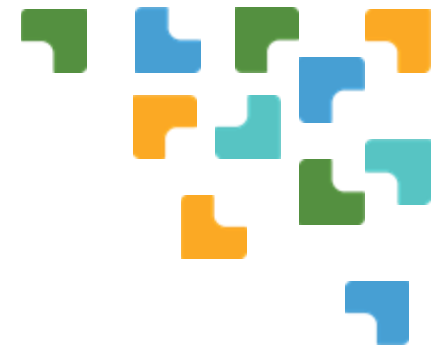
Site Address	Utility Account Number	Annual Contract Rate Increase Amount	Estimated Year 1 Production as Percentage of Customer Usage	Estimated Year 1 Customer Net Savings	Starting Utility Rate for Year 1 Savings (\$/kWh)	Estimated Savings over the RRES Term (20 years)	Utility Rate used for 20 Year Savings
990 Prospect Ave, Hartford, CT 06105	12345678901	2.90%	92%	\$850	\$0.30	\$18,000	\$0.350

- The Financial Benefits Narrative provides a description of the inputs and calculations that were used to produce the figures in the Summary Sheet.
- **For customer-owned systems:**
 - Column 3 should state “direct ownership”
 - Column 5 should convert monthly amount on disclosure form to an annual savings.
- **Columns 4, 7 & 8 cannot be redacted.**

From Disclosure Form

If provided to customers. If not provided to customers then enter “N/A.”

Financial Benefits Summary Sheet Q&A



Q: There are multiple entities involved with the solar project, who is responsible for including a project in their Annual Compliance Filing?

A: The entity that applied for the RRES program through the utility should include the project on their filing.

Q: Which projects need to be included in the sheet?

A: Only include projects that received permission to operate/activated in the prior year. If a project is a legacy project that qualified for net metering pre-RRES then it will not have the applicable disclosure form and does not need to be reported because it is not participating in the RRES program.

Q: Can I include additional columns or information in the Narrative or Summary Sheet?

A: Yes, you can but are not required to.

Financial Benefits Narrative



- **Important!** The entire Narrative document must be filed publicly, so ensure that it does not include any confidential information!
- Narrative should explain any calculation methodologies included in the Summary Sheet. It should also include list of documents, such as utility bills, shading reports, or contracts, where the information is derived from.
- **Consideration:** if your company has completed both Netting & Buy-All Tariff projects, you may want to explain that in the Narrative and identify that distinction in an additional column in the Summary Sheet.
- Installers **must** retain all of those documents listed in the Narrative at least until the end of the following year after the system is activated (through the end of 2025 for a system that was activated in 2024).

Marketing Materials & Sales Scripts

- Example Proposal
- Flyers
- One Pagers
- Billboard
- Digital Ads
- Video/Audio
- Sales scripts used with customers

Your Solar Story BEGINS HERE

OVERVIEW
Inside the PosiGen Portal, you'll find essential information to facilitate your journey with PosiGen. From understanding the benefits of solar energy to tips on optimizing your system, consider this your go-to guide for a greener and more cost-effective lifestyle.

SOLAR SAVINGS PORTAL
Click in on your solar panels to see how much energy they're producing and how much you've saved!

PAYMENT
Pay your bill online and easily with PosiGen's online bill pay portal.

Project Timeline

- STAGE 1 DESIGN & ENGINEERING**
Our design team will work with you to determine the best solar system for your home. This includes:
 - Site Survey
 - Proposed Solar Layout
 - Electrical Engineering
 - Structural Engineering
 - Permitting
- STAGE 2 PERMIT & APPROVALS**
Our team will handle all the permitting and approvals for your system. This includes:
 - Obtain all local, state and federal permits
 - Obtain all local, state and federal approvals
 - Obtain all local, state and federal permits
 - Obtain all local, state and federal approvals
- STAGE 3 INSTALLATION**
Our highly knowledgeable team will arrive on-site to install your solar system. This includes:
 - Site preparation
 - Mounting structure installation
 - Solar panel installation
 - Inverter and electrical work
 - System testing and commissioning
- STAGE 4 INSPECTION**
Our team will conduct a final inspection of your system to ensure everything is working properly. This includes:
 - System testing
 - Final inspection
 - System commissioning
- STAGE 5 ACTIVATION**
Your system is now fully operational and you can start enjoying the benefits of solar energy. This includes:
 - System activation
 - System monitoring
 - System maintenance

DOWNLOAD THE POSIGEN APP
Earn \$300 by Helping Others Go Solar

Download the PosiGen Solar app today and track your install, access your PosiGen Savings Portal, and refer friends and family to help them reduce their utility costs. Our easy-to-use app provides details on your install and the install of every customer you refer to us, along with tracking your cash projects directly within the app!

Available on the App Store and Google Play.

Going solar is easy!

Step 1: Get a FREE Quote
Our solar specialist will hold a consultation tailored to your unique home.

Step 2: Solar Install
Our team will take care of everything, including permits.

Step 3: Energy Efficiency
Our Energy Efficiency team will analyze your home to determine what improvements are needed to maximize your savings.

Ready to start saving?
See money & turn the sun's light into savings!

1-866-767-4436
PosiGen.com

PosiGen, Inc.
Connecticut: (860) 447-1111 (CT) 06039-01
Louisiana: (504) 885-1111 (LA) 70004
Massachusetts: (508) 233-1111 (MA) 01904
Mississippi: (601) 723-1111 (MS) 39201
New Jersey: (973) 401-1111 (NJ) 07030-0400
Pennsylvania: (717) 662-1111 (PA) 17320
Rhode Island: (401) 509-1111 (RI) 02882

Going solar is easy!
Set up a FREE solar consultation with PosiGen today.

Renewable Energy Specialist Contact Information
Name: _____
Phone: _____

PosiGen @posigenmedia #SolarForAll

PosiGen ENERGY EFFICIENCY

Solar Energy and Energy Efficiency
Improve Your Home and Protect Your Savings

PosiGen Energy Efficiency Upgrades Can Include:

- Air Conditioning
- Smart Thermostats
- Insulation & Weatherstripping
- LED Lighting
- Energy-Efficient Appliances

Why PosiGen Energy Efficiency Audits & Upgrades

LESS IMPACT ON THE ENVIRONMENT
Using energy more efficiently is a cost-effective way to reduce your footprint and help make our world a better place to live.

INCREASED COMFORT
Upgrades can lead to cleaner air, consistent heating and cooling, and reduction of moisture-related mold problems.

INCREASED HOME VALUE
Improved home performance can reduce maintenance costs, improve durability, and make your home more attractive to future buyers.

The average home loses a huge amount of energy through a variety of air leaks. Combined, these leaks make heating and cooling unnecessarily expensive.

BENEFITS

- LOWER ENERGY BILLS**
Air sealing and other affordable efficiency upgrades can reduce energy costs, which lowers your monthly utility bill.
- A CLEANER ENVIRONMENT**
Using energy more efficiently is a cost-effective way to help make our world a better place to live.
- INCREASED COMFORT AND HEALTH**
Upgrades can lead to cleaner air, consistent heating and cooling, and reduction of moisture-related mold problems.
- ENHANCED HOME VALUE**
Improved home performance can reduce maintenance costs, improve durability, and make your home more attractive to future buyers.

Customer Address: [REDACTED]

Your Custom Solar Design

26 4.15kW Panels | System Size | 11,180 kWh | \$148.09/month | 20 Years | Lease Terms

Lease Lifetime Energy Cost

Without PosiGen	With PosiGen
\$71,018	\$36,031

TOTAL SAVINGS \$36,031

Projected Energy Usage Cost
Track and compare utility consumption for your solar energy design.

Projected energy cost of kWh for a given month indicates that the following month's electricity bill may have a credit.

Other Examples



Additional examples of Financial Benefit Narrative, Marketing Materials, Sales Training Scripts, or disclosure forms can be found in browsing the filings in [Docket 23-08-02RE01](#).

Filings are organized alphabetically by filing type and then date filed.

Notices - Important PURA notices for docket participants which include opening the docket, directing participants on a matter, or notification of scheduled meetings.

Correspondence - Letters within the docket, including EOE issuing strikes after completing their review.

Compliance - Used by RRES installers for filing the required materials.

Motions - A Motion is used to ask PURA to take an action (motion for clarification, protective order, reconsideration, etc).

Rulings - PURA's ruling on a Motion. Please be aware that a ruling on someone else's motion could impact what you are required to do. If impacting all participants, likely will be issued through a Notice as well.



Connecticut Residential Renewable Energy Solutions Program – What Every Installer Needs to Know