

RPS Portal Workflows

Organization and User Management

Organizations let you give a group of users access to a group of applications.

Creating an Organization

1. From the “My Organizations” page, click “Create Organization”.
2. Enter the organization name and click “Create”.
 - a. Warning: You can not change organization names after creation.
 - b. You are automatically an admin of any organization you create.

Adding Organization Users

1. From an organization home page, click “Manage Organization Users”.
 - a. You will only have access to this button if you are an admin at the organization.
2. Click “Add Member”. Enter the email address of the user and click “Invite Member”.
 - a. Invited users must sign using a MyMassGov account that matches the email you have entered. If the user does not already have an account in the RPS Portal, they will receive an email inviting them to log in with MyMassGov.

Managing Organization User Access

1. Use the actions menu in the “Active Organization Members” table to toggle user roles.
 - a. Standard users can create and edit applications.
 - b. Admin users can create and edit applications, invite new users, and manage user access.
2. To remove a user from the organization, click “Remove Member”. Users who are removed will lose access to the organization.
 - a. You can grant access back to removed users by adding them again as new members.

Application Workflow

Creating an Application

1. From the organization home page, click “Start New Application”.
2. Select which RPS Class the application is for, and indicate whether the application is for an aggregation. Click continue.
 - a. Warning: You can not change either of these selections after creating the application.
3. You can navigate to the application form from the organization home page.
 - a. You may edit the application as many times as needed before submitting it.

Submitting an Application

Applications can only be submitted by the Authorized Representative. The authorized representative must be logged in with the same email address that is entered in the AR section of the application.

1. Carefully review the application and navigate to the “Certify and Submit” section. Check the certification box and type in your name.
 - a. Tip: Only type in your name when you are ready to submit the application. If you navigate back to previous sections, you will have to type your name again to submit.
2. Click “Submit Application”.
 - a. Warning: Once you have submitted your application, you can not make edits unless a DOER staff user unlocks your application.

Resubmitting an Application

After reviewing your application, DOER staff may determine that your application needs changes before it can be approved. Any applications that need changes will show up on your organization home page with status “Revisions Requested”. You must correct and resubmit your application.

1. From the organization home page, navigate to the application summary page. Click “Edit Application”.
2. Review comments from DOER.
3. Make the necessary changes to your application.

Change Request Workflow

Applicants can submit change requests for individual units, or for application data. Change requests are reviewed and processed by DOER. Data is updated in the portal once change requests are approved. You can only have one open change request of the same type per unit.

Requesting Changes for a Unit

(Unit Owner, Unit Capacity, Unit Independent Verifier, Unit Decommissioned)

1. From the organization home page, navigate to the “Units” tab.
2. Select Actions > New Change Request for the relevant unit.
 - a. From the dropdown modal, choose the type of change request and click “Create”.
3. Enter the updated data for the unit.
 - a. Tip: You can save and come back to the change request as many times as needed before submitting.
 - b. Tip: You can access draft and submitted change requests from the application summary page, and from the organization home page “Change Requests” tab.
4. Submit the change request.
 - a. Warning: Once you have submitted your change request, you can not make edits unless a DOER staff user unlocks it for resubmission.
5. After your change request is approved, DOER will notify GIS about your updated unit information within a month.
 - a. Tip: You can view when a unit’s information was last sent to GIS from the organization home page “Units” tab.

Requesting Changes for Application Data

(Applicant Contact, Authorized Representative, Operator)

1. From the organization home page, navigate to the application summary page.
2. Select Actions > New Change Request for the relevant unit.
 - a. From the dropdown modal, choose the type of change request and click “Create”.
3. Enter the updated data for the application.
 - a. Tip: You can save and come back to the change request as many times as needed before submitting.
 - b. Tip: You can access draft and submitted change requests from the application summary page, and from the organization home page “Change Requests” tab.
4. Submit the change request.

- a. Warning: Once you have submitted your change request, you can not make edits unless a DOER staff user unlocks it for resubmission.

Adding Units to an Aggregation

Aggregators can add units to approved applications. Unit additions work like other change requests.

1. From the organization home page, navigate to the application summary page.
 - a. Select Actions > Add Units
2. Enter data for new units.
 - a. Tip: If your application is for Solar PV, you can use the bulk import workflow.
3. Submit the change request.
 - a. After creating a Unit Addition change request, new units will show up on the application summary page and in the Units tab as “Pending”.

Resubmitting a Change Request

After reviewing your change request, DOER staff may determine that you need to make data corrections before approving the change request. Any change requests that need changes will show up on your organization home page with status “Revisions Requested”. You must correct and resubmit your change requests for re-review.