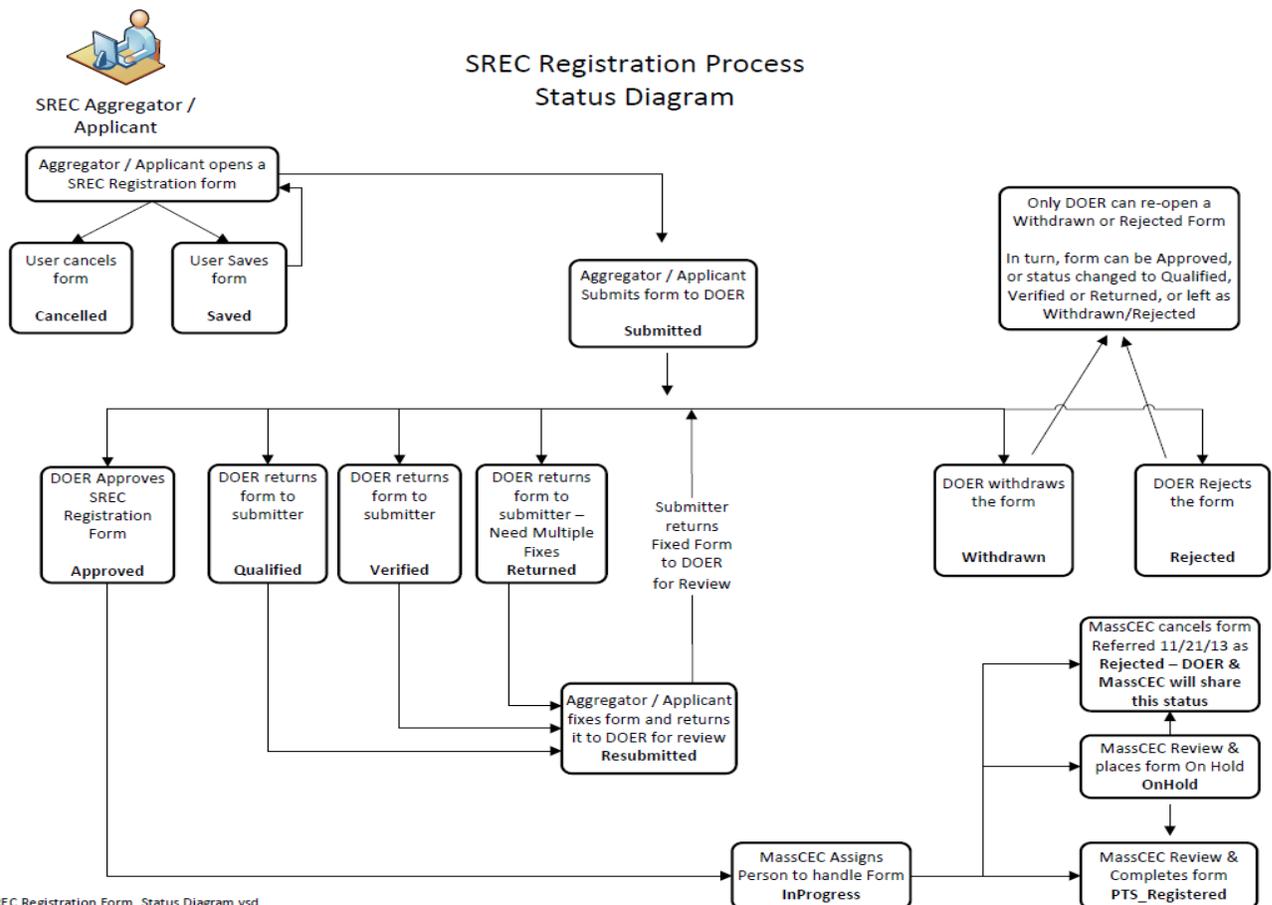


## SREC II Statement of Qualification Application (SQA) & Production Tracking System (PTS) User Guide

- MassCEC, as selected by DOER, is the sole independent verifier for all SREC and SREC II qualified photovoltaic (PV) generation in the Commonwealth of Massachusetts.
- The PTS is a software application maintained by MassCEC and used to support independent reporting and verification.
- The SQA uses the PTS platform and supports direct entry of SREC II application details by the Applicant.
- For SQA access, go to the PTS at [www.masscec-pts.com](http://www.masscec-pts.com)
  - Recommended internet browsers include: **FireFox and Internet Explorer 11**
  - Ensure compatibility mode for MS Internet Explorer via the following:
    - Select Page --> Compatibility View Settings --> Check Display all websites in compatibility view --> Close
- SQA will utilize Aggregator/Applicant, DOER, and MassCEC work queues
  - Aggregators and Applicants submit, DOER approves, and the MassCEC registers PV applications for SRECs.



### Non Rebated application workflow for SREC II Registration

1. Aggregator/Applicant signs into SQA with existing User ID that has been given Applicant privileges, or requests a new Applicant User ID if required.
2. *Aggregator/Applicant SQA Queue*
  - Aggregator Applicant creates, completes, and submits new form to DOER.
3. *DOER Queue*
  - DOER reviews and Approves, Qualifies, or Returns application.
4. *MassCEC Queue*
  - Production Team will register PV System once Approved by DOER.

### Queue Status Definitions

<i>User</i>	<i>Status</i>	<i>Definition</i>
Aggregator or Applicant	Save	SQA data, selected attachments & note(s) have been saved by Aggregator/Applicant, BUT SQA Registration Form has not yet been submitted to DOER
Aggregator or Applicant	Cancel	SQA Registration Form is cancelled and removed from Queue
Aggregator or Applicant	Submit	SQA Registration Form with completed data, attachments, notes & messages has been submitted to DOER for Review
Aggregator or Applicant	Re-submitted	SQA Registration Form is resubmitted to DOER by Aggregator/Applicant. DOER had previously returned form to the Aggregator/Applicant requiring additional or revised information.
DOER	Qualified	SQA Registration is incomplete due to missing Authorization to Interconnect form. System is not operational. DOER has returned form to Aggregator/Applicant requiring attachment be provided and resubmitted; system location (town, state or zip) can not be edited at this point.
DOER	Returned	SQA Form has miscellaneous or multiple errors. Form was sent back to Aggregator/Applicant by DOER for correction(s) and to be re-submitted; system location (town, state or zip) can not be edited at this point.
DOER	Withdrawn	SQA Form has been withdrawn by DOER at the Submitter's request. Only DOER can subsequently re-open a "Withdrawn" form.
DOER	Rejected	Form has been rejected by DOER or cancelled by MassCEC. In both cases, status will be updated to "Rejected". Only DOER can subsequently re-open a "Rejected" form.
DOER	Approved	SQA Form has been Approved by DOER and sent to MassCEC for review .
MassCEC	In Progress	SQA Form (in "Approved" status), can be assigned to a specific MassCEC person with this Status.
MassCEC	On Hold	SQA Form has been put "On Hold" by MassCEC.
MassCEC	PTS Cancelled	SQA Form has been Cancelled by MassCEC.
MassCEC	PTS_Registered	SQA Form has been reviewed, found to be complete, and marked "PTS Registered" by MassCEC.

## **Rebated System Workflow for SREC II Registration**

1. Installer applies for Rebate to the MassCEC Solar Team, using PowerClerk (PC), when PV Project is in development.
2. Installer sends Project Completion Document with Date-In-Service (DIS) and Initial Meter Reading (IMR) to MassCEC Solar Team post interconnection.
3. MassCEC Production Team completes a “DataPush” from PC to the Production Tracking System (PTS), which provides data for Rebated system SREC registration.
4. *Aggregator/Applicant SQA Queue*
  - a. Sign into PTS with User ID
  - b. Search for existing Rebated system
  - c. Add NEW or CHANGED information (not already available via PC)
  - d. Submit updated and completed form to DOER for approval
5. *DOER Queue*
  - a. DOER reviews and Approves, Qualifies, or Returns application
6. *MassCEC Queue*
  - a. Production Team will register PV System once Approved by DOER

### “Change Request Form for Approved Systems”

- Once a system has been Approved and Registered, if there are subsequent data changes, then a “Change Request Form for Approved Systems” must be submitted to the DOER via email. Please contact DOER at [Doer.Srec@state.ma.us](mailto:Doer.Srec@state.ma.us) for this form.
- DOER will approve and forward changes to MassCEC for PTS entry.

### “Expansion Systems”

- SREC II eligible expansions to SREC I qualified systems require a new meter and will follow the “Change Request Form for Approved Systems” process.

## Maneuvering through the SQA

Go to [www.masscec-pts.com](http://www.masscec-pts.com) and sign in with existing User ID, which should already be assigned Applicant privileges.



**Welcome to the MassCEC Production Tracking System**

Please enter your user name and password.

User name:

Password:

[Never received your user name or password?](#)  
[Forgot your user name or password?](#)

You may register [here](#) to become an Applicant for SREC II systems.

For help with this website contact PTS Customer Support during Business Hours, Mon-Fri 9am – 5pm at:

Email [pts@masscec.com](mailto:pts@masscec.com)  
Phone 866-314-9367 (Toll Free)  
Fax 617-315-9356  
Mail Massachusetts Clean Energy Center  
Attn: PTS Customer Support  
63 Franklin Street, 3rd Floor  
Boston, MA 02110

Or, select “You may register [here](#) to become an Applicant for SREC II systems” to obtain a new Applicant User ID.



**Welcome to the MassCEC Production Tracking System**

Please enter your user name and password.

User name:

Password:

[Never received your user name or password?](#)  
[Forgot your user name or password?](#)

You may register [here](#) to become an Applicant for SREC II systems.

For help with this website contact PTS Customer Support during Business Hours, Mon-Fri 9am – 5pm at:

Email [pts@masscec.com](mailto:pts@masscec.com)  
Phone 866-314-9367 (Toll Free)  
Fax 617-315-9356  
Mail Massachusetts Clean Energy Center  
Attn: PTS Customer Support  
63 Franklin Street, 3rd Floor  
Boston, MA 02110

Once logged into PTS, select the Registration menu tab and then select "SREC II Systems" to launch SQA.

The screenshot shows the top navigation bar of the Massachusetts Clean Energy Center website. The logo is on the left, and three images of solar panels are on the right. Below the logo, there are two tabs: "Registration" and "Log Off". A red arrow points to the "SREC II Systems" link, which is highlighted in green. Below the navigation bar, the "DER" logo for the Massachusetts Department of Energy Resources is displayed. The main heading is "Statement of Qualification Application (SQA)". A grey box contains instructions: "Click on any underlined link for help on that topic.", "For help any time use the Help button on the navigation bar in the upper right-hand corner.", and "Please do not use your Browser's Back Button while navigating the PTS." Below this is a link for "Navigation Tips". On the right side, there is a vertical purple bar with the text "Help on this page".

At the next page, select the "SREC II Full Form App" from the dropdown menu

The screenshot shows the "SREC II Full Form App" interface. The top navigation bar is the same as in the previous screenshot. Below it, there is a dropdown menu with "SREC II Full Form App" selected and a "Register System" button. A red arrow points to the dropdown menu. A green box labeled "Select Form Type" is positioned above the dropdown. Below the navigation bar, there is a "Refresh" button. A table with the following columns is displayed: PTS ID, System Name, DC Capacity, City, Status, Last Updated, System Owner, and Production Reporter. The table is currently empty, with the text "No records to display." below it. A "Clear filters" button is located at the bottom left.

PTS ID	System Name	DC Capacity	City	Status	Last Updated	System Owner	Production Reporter
			Webster				

When "SREC II Full Form App" is selected, that field and "SREC II Rebated System App" will be an option  
Select "SREC II Full Form App" for non-rebated systems.

Registration Log Off

SREC II Full Form App Register System

SREC II Full Form App

SREC II Rebated System App Refresh

PTS ID	System Name	DC Capacity	City	Status	Last Updated	System Owner	Production Reporter
			webster				

No records to display.

Clear filters

Select "Register System" to create a new non-rebated application

Registration Log Off

SREC II Full Form App Register System

SREC II Full Form App

SREC II Rebated System App Refresh

PTS ID	System Name	DC Capacity	City	Status	Last Updated	System Owner	Production Reporter
			webster				

No records to display.

Clear filters

This page is also the "Applicant Queue" and will list all applications associated with the Applicant's ID.

Registration Log Off

SREC II Full Form App Register System

SREC II Full Form App Refresh

PTS ID	System Name	DC Capacity	City	Status	Last Updated	System Owner	Production Reporter
			webster				

No records to display.

Clear filters

NoFilter  
Contains  
EqualTo

- Note the filter icon to the right of each field, which facilitates different types of searches.

Once “Register System” is selected, this will be the following screen:  
 (complete the application by entering the necessary data into the fields in each tab)

- Tabs include: System Info/Qualifications/Contact Info/Equipment/Install Info/Attachments/Certification/ and DOER (viewable once application is approved)
- Note \* = *Required*
  - Required information fields on each Tab must be completed to move to the next tab
  - If fields with an asterisk are not completed, then the form will not submit to DOER
- Note the “Current Status” field in the top right of the page
  - When all *Required* fields for all tabs are completed, then go to the “Current Status” dropdown and select “Submitted”.
  - A form can also be “Saved” and then completed at a later point in time.
- Note the “Return to Queue” function in the top left.
  - If selected, then the user can go into their queue and see the application’s history when the System’s hyperlink Status is chosen.

Status	Status Date Time	Processed By
Resubmitted	5/7/2014 8:09:00 AM	Applicant
Returned	5/7/2014 7:58:00 AM	DOER
Submitted	5/7/2014 5:06:00 AM	Applicant

/OLR/WebFormStatus-History.aspx?WebFormInstanceId=317

Select "SREC II Rebated System App" to search for existing Rebated applications already submitted via Power Clerk

The screenshot shows the Massachusetts Clean Energy Center website. At the top left is the logo with the text "MASSACHUSETTS CLEAN ENERGY CENTER". Below the logo are navigation links for "Registration" and "Log Off". A "Select Form" button is highlighted with a green box. A dropdown menu is open, showing three options: "SREC II Full Form App", "SREC II Full Form App", and "SREC II Rebated System App". A red arrow points to the "SREC II Rebated System App" option. Below the dropdown is a "Register System" button. A table with columns for "PTS ID", "System Name", "DC Capacity", "City", "Status", "Last Updated", "System Owner", and "Production Reporter" is visible. The "City" column has a dropdown menu with "webster" selected. A "Refresh" button is in the top right of the table area. Below the table, it says "No records to display." and there is a "Clear filters" button.

Search for a rebated system via one of the three options depending on available information and then select the System Name.

The screenshot shows a window titled "Rebated System Search". It contains the following text: "Please search for the rebated system using one of the following three sets of data:" followed by three radio button options: "Both PTS ID and Power Clerk App ID", "PTS ID plus one of {DC Capacity, City, System Owner's Last Name}", and "Power Clerk App ID plus one of {DC Capacity, City, System Owner's Last Name}". The third option is selected. Below the options are four input fields: "PowerClerk App ID:", "DC Capacity (Size):", "City:", and "Owner's Last Name:". A "Search" button is located below the input fields. Below the search area is a table with the following columns: "System Name", "City", "DC Capacity", "System ID", and "Power Clerk App ID". The table content shows "No records to display." A red arrow points to the "System Name" column header.

Complete the rebated application by entering the necessary data into the fields in each tab.



[Registration](#) [Log Off](#)

[Return to Queue](#) Current Status: Unsaved [Change Status To:](#)

[System Info](#) [Qualifications](#) [Contact Info](#) [Equipment/Install Info](#) [Attachments/Certification](#) [DOER](#)

### Site Information

\*Site Name

\*Address1

Address2

City

State

\*Zip Code

Facility Type

\* = Required

### System Information

\*System Size (kW DC)

Is this part of an existing aggregation?

Generation Unit/Aggregation Name

NEPOOL GIS Generation Unit Asset ID#

NEPOOL GIS Plant-Unit Name

\* = Required