

Solar Installers

FormBay[®]

Your user guide & Compliance

Welcome to FormBay

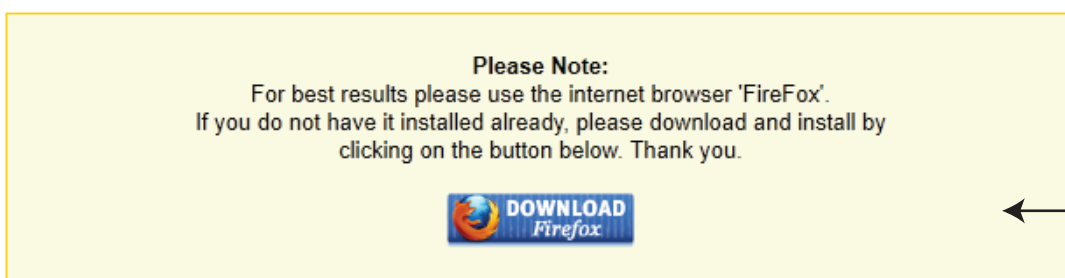
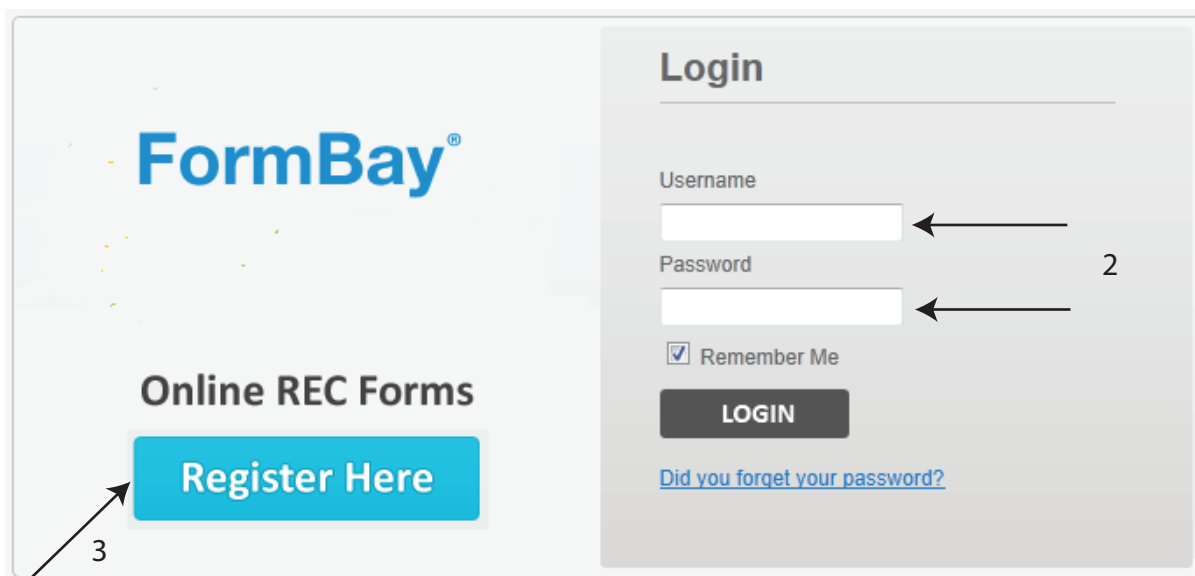
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Logging into FormBay

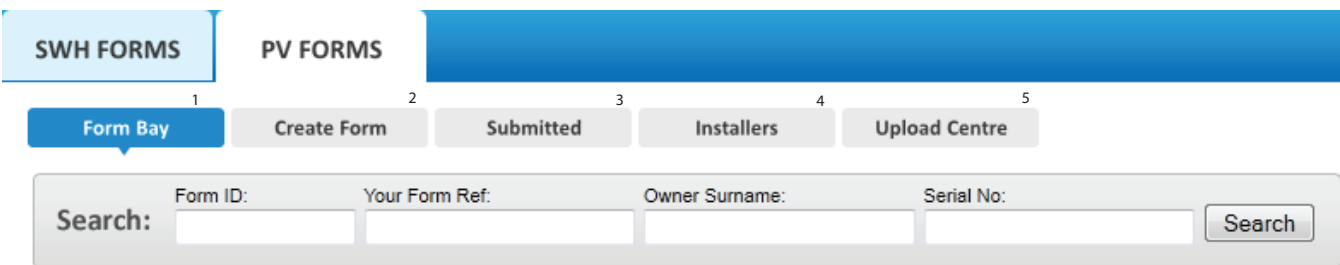
Getting started:

1. Please ensure you are using Firefox as your internet browser. If you don't have Firefox simply press on the download now button as below.
2. Log in using your username and password. Click on the 'Remember Me' box as this avoids the system logging you out automatically.
3. If you are not registered, click on 'Register Here' which will direct you to the registration page.



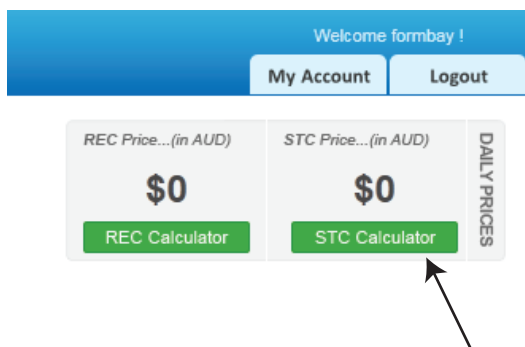
Functions

Once logged into FormBay, this will bring you to the front holding page. When a form has been created, this is where it will be housed until you choose to submit it.



There are five main function sections in FormBay:

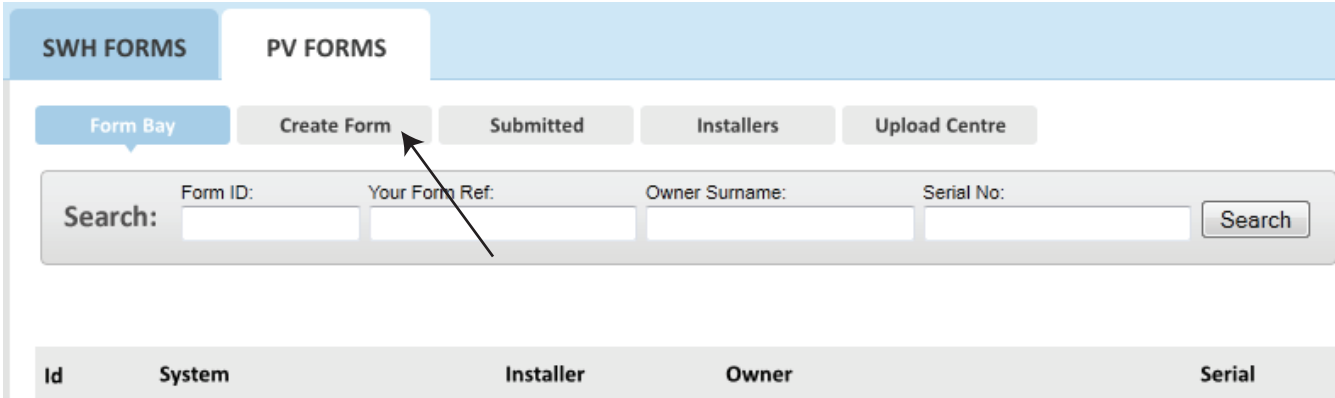
1. **Form Bay** - overview of forms to be submitted
2. **Create Form** - where the creation of a STC assignment forms occur
3. **Submitted** - allows the viewing of all submitted forms
4. **Installers** - a list of all active installers
5. **Upload Centre** - where all documentation can be uploaded



This page also shows you the spot rate of the day for STCs and RECs. These prices will only be visible during trading hours in which you can submit your forms. By clicking on the calculator you are able to work out the value of your solar credits.

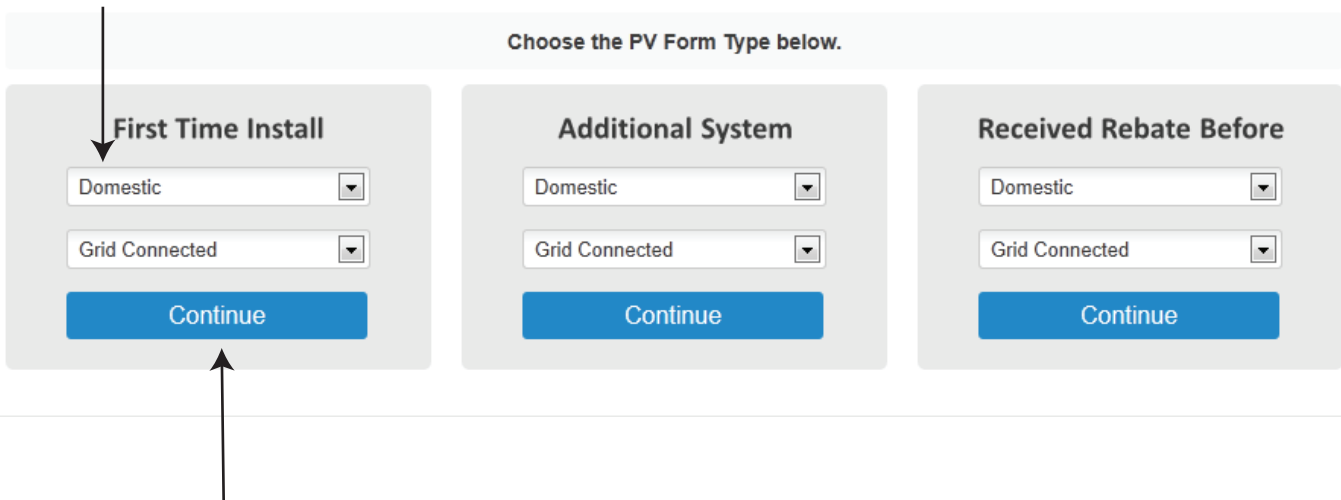
Creating a new Form 1

1. **Creating a new form:** click on the 'Create Form' tab.



2. **Choose Form Type:** This page is where you will need to enter all of the information required to submit a compliant STC assignment. All fields marked with an asterisk are mandatory. You will need to enter valid data into these fields in order to save to Form Bay.

Create PV Form



3. **Choose the type of install:** i.e. First time Install, Domestic and Grid connected and click 'Continue'

Creating a new Form 2

Fill in details accordingly - See page 5 for Summary of required information

The image shows a screenshot of the FormBay installer form with numbered callouts (4-16) pointing to specific fields and sections:

- 4:** Your Form Reference Number
- 5:** Inverter Brand and Series dropdowns
- 6:** Installation Date
- 7:** Rated Power Output (KW)
- 8:** Enter Number of Solar Panels
- 9:** In Exchange for RECs? (radio buttons for a point of sale discount or a monetary payment)
- 10:** Additional information for this Installation
- 11:** Panel Serial Numbers table
- 12:** Additional information text area
- 13:** * Please specify total of owner's Out Of Pocket Expenses
- 14:** Owner Address section
- 15:** Select Installer, Designer, and Electrician dropdowns
- 16:** Save Form to FormBay button

Vertical labels on the right side of the form indicate sections: **INSTALLATION DETAILS** (covering callouts 4-11) and **OWNER DETAILS** (covering callouts 12-15). A **INSTALLERS** label is also present at the bottom right.

Creating a new Form 3

4. **Form Reference Number:** This is your reference number. Your Agent will use the Form ID number generated by FormBay. This Form ID number is allocated after the form has been created and saved.
5. **Panels and Inverter:** Using the drop down menu select the Panel brand and model, followed by selecting the Inverter brand, series and model. These panels and inverters have to be approved by the CEC Council. This list has been integrated into the FormBay system.
6. **Installation date:** This is the date the installation was completed by the installer.
7. **Rated Power Output:** This is the rating of the system determined by the installed panels. In order to calculate this you need to times the wattage of the panels by the quantity installed, i.e. $190 \times 10 = 1900 \div 1000 = 1.9$.
8. **Number of Serial Panels:**
Enter the number of serial panels that have been installed, e.g. 8, 10, 12 etc.
9. **In exchange for RECs:** This step is asking whether you have provided a discount at the point of sale or if a monetary payment has taken place. You will need to provide the amounts that you have provided to the customer.
10. **Deeming Period:** Choose the number of years which determines the amount of STC credit, with 15 years being the maximum credit.
11. **Panel Serial Numbers:**
Enter the individual serial numbers for each panel installed. Note: The serial numbers can be added in after installation.
12. **Addition Information:** Please provide any additional information related to the installation i.e dual occupancy on one property.
13. **Out of Pocket Expenses:** This is the amount of money the owner ends up having to pay for the system after discounts and giveaways, and dependant on State/Territory, must also include metering or an estimate of metering cost. Note: The ORER allows for a \$100.00 deviation if cost of metering has to be estimated. Please see the OOPE calculator in create form to assist in confirming the correct OOPE.
14. **Owner Details:** This is the information relevant to the owner of the building. If the system is being installed at the owner's property, check the box that it is the same address.
If the system is being installed at a different property, the property address information will need to be entered, including some extra notes if it is an additional system.
15. **Select the Installer:** Designer and Electrician from the drop down boxes. This is a required field when creating the form. You can add/edit your list of Installers, Designers and Electricians by clicking on Add New Profile.
16. **Save Form to Form Bay:** Once you have completed your form, click here to save your form to Form Bay. This will then take you back to the Form Bay screen where you will see the information you have added.

Documents Required - STC Form

STC Assignment Form - PV Solar

OFFICE USE ONLY: FORM ID: 17538 DATE: [] DATA: []
 SolarPola Pty Ltd, level 1, 275 Clarence Street NSW 2000

OWNER DETAILS

FIRST NAME: John LAST NAME: Smith COMPANY: []
 POSTAL ADDRESS: 17 Baumans RD, RIVERWOOD STATE: NSW POSTCODE: 2210
 TELEPHONE (H): 0415811105 MOBILE: NA FAX: NA
 INSTALLATION ADDRESS: 17 Baumans RD, RIVERWOOD STATE: NSW POSTCODE: 2210

SYSTEM DETAILS

IMPORTANT Is this system ADDITIONAL? No Are you installing a COMPLETE unit? Yes
 (Are you adding extra capacity/panels or a completely new system which is in addition to an existing system for this address?) (Adding additional capacity/panels to an existing system is NOT considered a complete unit)
 If YES, the system is additional, please specify where the panels or system is in relation to the existing system: (eg. additional 6 panels added to the end of an existing 4 panel system facing north)

Panel Brand: Conergy Panel Model: PP230M
 Inverter Brand: SMA Inverter Model: SB2500
 Installation Date: 04/02/2011
 Rated Power OutPut (kW): 2.76kW Number of Panels: 12

Have you received or been approved for a REBATE or financial assistance (including Solar Credits) for any small generation unit at this address? YES NO
 Have you received Solar Credits (multiplied STCs) for a small generation unit at this premises/address? YES NO
 Is this an ELIGIBLE premises for Solar Credits (STC Multiplier)? YES NO

STC Deeming Period: 3yrs 9yrs 15yrs
 15 years deeming can only be created if installed on the past 12 months

Is the system grid-connected? YES NO

CEC INSTALLER SECTION: (Here we need to know the installer, the designer and the electricians details)

INSTALLER: Full Name: Gerry Berdebes Phone: 2046771772 Address: 19 Hereford WAY, PICTON, NSW 2571	DESIGNER: Full Name: Johnson Lee Phone: 0295337444 Address: 34 UNIT, 17 Lorraine ST, PEAKHURST, NSW 2210	ELECTRICIAN: Full Name: Gerry Berdebes Phone: 2046771772 Address: 19 Hereford WAY, PICTON, NSW 2571
Accreditation No. A8524921	Accreditation No. A7381168	Accreditation No. EC32804

MANDATORY WRITTEN STATEMENT BY THE CEC INSTALLER AND DESIGNER

I, Gerry Berdebes (name of installer) was the accredited CEC installer that completed the SGU installation at 17 Baumans RD, RIVERWOOD, NSW 2210 and verify that I have installed the system and that it meets the following requirements: The CEC accreditation guidelines, the CEC Accreditation Code of Practise and am bound by their Code of Conduct; Have used panels and inverters approved by the CEC; Followed all of the Office of the Renewable Energy Regulator's Guidelines; Have \$5M in Public Liability Insurance; and the system meets the following Australian Standards, where applicable...

PV & Inverter Standards
 AS/NZS 5033:2005, Installation of photovoltaic (PV) arrays
 AS/NZS 1170:2002, Structural Design actions, Part 2: Wind Action (PV Array).
 AS/NZS 5033, PV modules are compliant and the product is listed at www.cleanenergycouncil.org.au.
 The grid connected inverter used has been tested to Standard AS 4777 and the product is listed at www.cleanenergycouncil.org.au

Grid connected system
 AS/NZS 3000:2007, Wiring Rules.
 AS 4777, this installation complies to this standard
 AS/NZS1768:2007, Lightning Protection.
 AS 4777:2005 Grid connection of energy systems via inverters

Standalone Systems
 AS/NZS 4509:2009, Standalone Power systems, Part 1: Safety & installation.
 AS 4086 2:1997, Secondary batteries for use with standalone power systems, Part 2: Installation & maintenance, wind system.
 AS/NZS 3000:2007, Wiring Rules

I verify that all local, State or Territory government requirements have been met for: i) The siting of the unit; ii) The attachment of the unit to the building or structure; iii) The grid connection of the system for the SGU installation. I verify that the SGU is: Grid Connected An Off grid installation, and an electrical worker holding an unrestricted license for electrical work issued by the State or Territory authority for the place where the unit was installed undertook all wiring of the unit that involves alternating current of 50 or more volts or direct current of 120
 I confirm that the details in the above statement are correct.

Signature of the SGUs CEC installer: [Signature] CEC NUMBER: A8524921
 Signature of the SGUs CEC Designer: [Signature] CEC NUMBER: A7381168

PRINT NAME - Gerry Berdebes PRINT NAME - Johnson Lee DATE: []

MANDATORY DECLARATION

I am the legal owner of the above small generation unit (SGU) and assign the right to create STCs to SolarPola for the period stated above, commencing at the date of installation.
 I have not previously assigned or created any STCs for this system within this period.
 To claim 15 years deeming for SGU, STCs must be registered within 12 months of installation.
 I understand I am under no obligation to assign STCs to SolarPola
 I agree to repay the STC payment to SolarPola should my assignment be invalid.
 I understand that an agent of the Office of the Renewable Energy Regulator or SolarPola may wish to inspect the SGU within the first five years of certificate redemption.
 I must retain receipts and proof of the installation date for the life of the STCs
 I am aware that penalties can be applied for providing misleading information in this form under the Renewable Energy (Electricity) Act 2000.
I further declare that the accredited CEC installer named on this form physically attended the installation of the unit.

I understand that this system is eligible for 181 STCs and exchange for assigning my right to create these STCs, I will receive from the installer/supplier:
 A point of sale discount of \$ 6356 A monetary payment of \$ []
 Out of pocket expenses: \$11855.5

Owner Signature: [Signature] Agent/Installer Signature: [Signature] Date: 09/12/2011

PRIVACY DECLARATION: COvero will only use this personal information as intended and will not sell or divulge this any third parties other than the Office of the Renewable Energy Regulator.

CUSTOMER GST DECLARATION

Is the SGU used for Commercial or Domestic use? Commercial Domestic
 Is the owner of the SGU registered for GST? Yes No
 If so, please provide full Business Name and ABN / []

SERIAL NUMBERS
 0001425012, 0001425063, 0001425055, 0001425009, 0001425021, 0001424909, 0001425005, 0001425044, 0001425041, 0001424985, 0001425030, 0001424911

Check the owners address details are correct.

Installation date
 The installation date needs to match the installation date inputted into FormBay

Installers & Acc Code
 The installer, designer & electrician need to be CEC approved

Regulations.
 All standards, regulations, requirements which ORER require to be within the CEC mandatory written statement need to be current.

Check Installer & Designer Signatures, these are required to match the details on the assignment form

Signatures
 The home owner and the agent signatures are required on the STC form, providing proof the install occurred.

On-Site Declaration
 All installs after 1st February 2011 require an on site declaration statement declaring the installer stated on the assignment form physically attended the installation.

INVOICE

All information entered needs to match the information which has been entered into FormBay failure to produce this proof will result the submission not being approved.

18-FEB-2011 16:28 From:

97940861

Tel: 1300982532

Page: 2/4



Living Wise Pty Ltd
 t/as Solahart Dandenong
 ABN 34 115 640 367
 90 Cheltenham Road
 Dandenong VIC 3175
 T: (03) 9794 0844
 F: (03) 9794 0861
 E: info@livingwise.com.au
 W: www.livingwise.com.au

Purchase Contract

1971

Date	15/11/10
Estimator	Installers Name

Customer Details

Name	Home Owners Name		
Address	Home Owners Address		
	Town, Post Code		
Installation Address			
Phone	Home	Work	Mobile
	9772 1917		0408 372 822

Check the owners address details are correct.

Item	Ex GST	GST	Ino GST
1.5kW GRID-CONNECTED SOLAR POWER SYSTEM SUPPLY & FULL INSTALLATION			\$3,000 -
8x 188W MONOCRYSTALLINE SOLAR PANELS			
1x 1.5kW SOLAR INVERTER			
ASSIGN RECS TO LIVING WISE			
Metering included			
Sub Total			\$3,000 -
Less Rebate			-
Net Total			\$3,000 -
Deposit Received 15/11/10	Method: CHEQUE		\$1,600 -
Balance	Method: CHEQUE		\$2,400 -

Metering
 If there was a metering charge incurred, be sure to include this in the invoice

Payment	
Card No.	Expiry

OOPE NUMBER
 Out of Pocket Expense figure is the figure the customer is required to pay for the installation after all deductions are taken off .

Acceptance
*It is the purchaser's responsibility to ensure that existing services i.e. gas, electricity, wiring, meter boxes, switchboards, water pressure, etc. are of adequate capacity and condition.
 *Any rebate allowed is subject to the applicable rebate form being completed correctly by the purchaser and supplied to Living Wise Pty Ltd.
 *All goods remain the property of Living Wise Pty Ltd until the goods are paid for in full.

I/We JULIE MILBURN accept your quotation dated 15/11/10 for the goods & services as described above.

Signed [Signature] Date 15.11.10

In simple terms it's the monetary value they end up paying out for the system. Check the figure, be sure to take into account all payments included deposits and also any giveaways which maybe listed.

Documents Required - CCP - Certificate of Compliance

CERTIFICATE OF ELECTRICAL SAFETY for Prescribed Electrical Installation Work

ELECTRICITY SAFETY ACT 1998, ELECTRICITY SAFETY (INSTALLATIONS) REGULATIONS 2009

CERTIFICATE OF COMPLIANCE

1 Responsible Person (eg. electrical contractor, supervising electrician, electrician)

REC reg./licence no. 18080 Telephone no. 51835100

Name LOWLWAL REC

Business Address SHOP 1B 45 HIGH ST WALLAN

2 Licensed Electrical Installation Worker (eg. electrician)

Licence no. A40232

Name BRAD LOWLWAL

3 Details of Electrical Installation

Name of customer ROBERT STERCEL

Address of installation (include lot no. if required) UNIT 5/4 BAXTER CT

Suburb or town MOE Postcode 3825

Telephone 51272463

NMI (if available)

4 Electrical Work Undertaken

No. light points	No. single	Socket outlets	No. doubles	Have you installed Air Conditioning?
				Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

Maximum demand in amps per phase on completion 42A Consumers mains capacity in amps 63A

Description of work undertaken (if insufficient space, please attach list)

2 KW GRID FED SYSTEM
10 X 190 WATT SYSTEM INSTALLED ON ROOF.
INVERTER MOUNTED ABOVE SWITCHBOARD

5 Has this **prescribed electrical installation work** failed a previous inspection? Yes No

If yes, quote previous certificate number

6 Type of prescribed electrical installation work (refer back of certificate for types) 1 2 3 4 5 6 7 8 9 10

7 Does this installation work induce **non-prescribed electrical installation work**? Yes No

8 Type of property where the electrical installation work is carried out: (refer back of certificate for types)

1 Domestic 2 Non Domestic 3 Construction

I, the licensed electrical installation worker named above, who carried out the electrical installation work described above, certify that the electrical work has passed all the required tests and complies in all respects with the Electricity Safety Act 1998 and the Electricity Safety (Installations) Regulations 2009.

Signature (Licensed Electrical Installation Worker) Brad Lowlwal

9 Date of completion of work 20/06/11 10 Date Certified 20/06/11

PRESCRIBED Customer copy

CERTIFICATE OF INSPECTION

Certificate no. 4903 029 7

Details of Licensed Electrical Inspector (LEI)

Name Michael Muscat

Licence no. 980352

Inspector's Employer

Name (if applicable)

Details of Defects
Please supply defect code(s)

I, the Licensed Electrical Inspector named above, have inspected the prescribed electrical installation work as described in the certificate of compliance and certify that the work **complies** **does not comply** with the Electricity Safety Act 1998 and the Electricity Safety (Installations) Regulations 2009.

Signature Michael Muscat

Date inspected 30/06/11

Date certified 30/06/11

Safety Statement
In accordance with Regulation 242 (1) this electrical installation appears to be electrically unsafe: unsafe

Check the owners address details are correct.

Electrician Signature
The electricians name and signature needs to be present on the CCP form

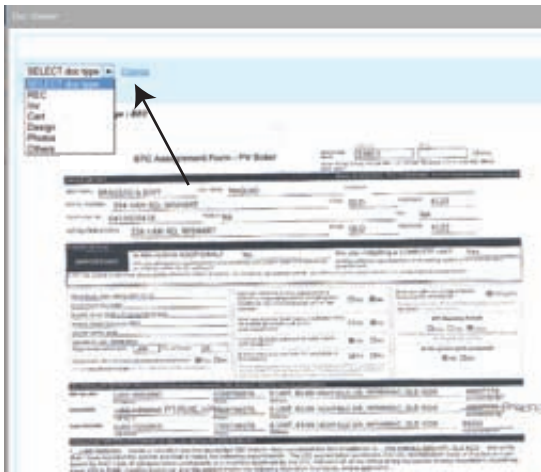
Date of Compliance needs to be on or after the installation has occurred

Uploading documents to FormBay

There are two types of ways to upload your files either on the Form Bay page or in the 'Upload Centre'. To upload direct from the holding page, simply click on 'Upload a file' select your folder to upload, wait for the upload to finish and select the type of document using the drop down arrow and press assign.

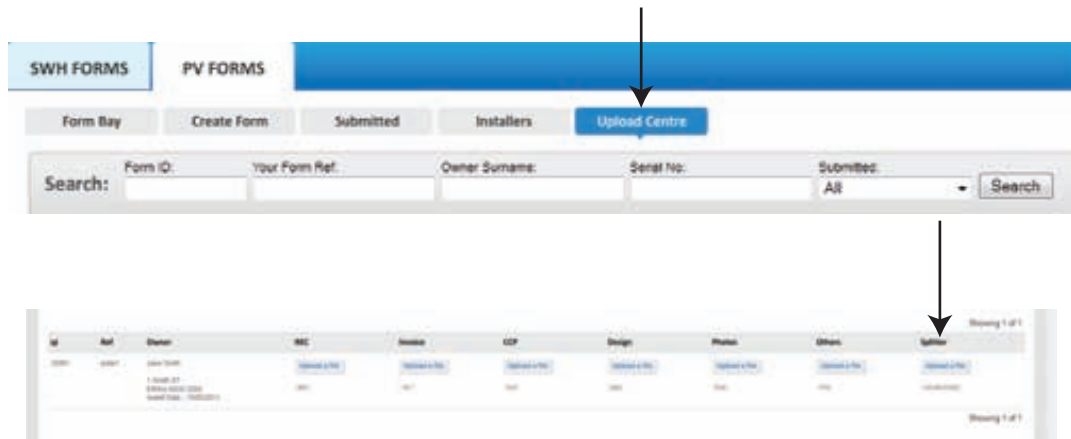


Actions	Requirements	Docs
Print as PDF Edit Form Delete Form	<div style="background-color: red; color: white; padding: 2px; display: inline-block;">5 Requirements</div> <i>You can Submit this form only after fixing all errors</i>	<div style="border: 1px solid gray; padding: 2px; display: inline-block;">REC</div> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">INV</div> <div style="border: 1px solid gray; padding: 2px; display: inline-block;">GCP</div> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-top: 5px;">Upload a file</div>



Select the type of Document, and click on 'Assign'

The alternative option is to use the 'Upload Centre' where you can upload documents separately or together using the Splitter function. Search for the customer record to upload your documentation to using the search tool bar. Click on 'Upload a file', select relevant documentation and upload or select the Splitter tab and upload more than one document at a time.



Splitter function

Printing Editing and Deleting

Under the actions column, you are able to do the following:

ID	System	Installer	Owner	Serial	Ref	RECs	\$Val	Install Date	Actions	Requirements	Docs	Submission
10001	FE Apollo New Energy Corp PSE KAP-178	Central Institute PONTIAC MI	Steve Brown	20000	100	0.0	09/06/2011	Print as PDF Edit Form Delete Form	<div style="border: 1px solid red; padding: 2px; color: red; font-weight: bold;">Requirements</div> <p>You can Submit the form only after meeting all requirements.</p>	Upload a File	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Ref	RECs	\$Val	Install Date	Actions
Test1	165	\$4125 STC @ \$25	09/06/2011	Print as PDF ← 1 Edit Form ← 2 Delete Form ← 3

- [Print as PDF](#) This generates all the information inputted into the system on your agents STC Assignment form which can be printed off and signed when the installation occurs. Double click and this will generate the STC form to open in Adobe PDF. If the iPhone is being used, the signatures will appear on the sheet once the customer has signed and the documents uploaded.



- [Edit Form](#) This allows the editing of any created forms in Form Bay, providing that the submission has not been submitted. Once you have made the required changes, click on 'Save Form to Form Bay' button at the bottom of the screen. If a form needs to be changed after submission you must contact your agent with the Form ID number. Your agent can release the form back to Form Bay for changes to be made however you will then need to re-submit the form.

Save Form to Form Bay

- [Delete Form](#) If the form is not valid, it can be deleted off the system by clicking on the delete icon.

Requirements

In order to submit your forms there are certain requirements that need to be met. If they are not fulfilled, FormBay alerts you by highlighting the requirements box. By clicking the Requirements box this shows the issues that need to be corrected before submission can occur.

This could be for a number of reasons:

- i.e. - Issue with serial numbers - when the serial numbers are highlighted in red this means there has been a duplication with another submission
- Number of panels does not match the number serial numbers inputted
- Upload of required documents - not all required documents have been uploaded

Issues with submission

\$Val	Install Date	Actions	Requirements	Docs
\$41 STC			<div style="border: 2px solid red; padding: 5px;"> <p>3 Requirements</p> <p>1. Issue with Serials</p> <p>2. No of panels does not match the serials</p> <p>3. Please Upload Required Documents <i>You need to upload the required documents before you can submit. You can now upload on this page by clicking the 'Upload a File' button.</i></p> </div> <p><i>You can Submit this form only after fixing all errors</i></p>	<p>REC</p> <p>INV</p> <p>CCP</p> <p>Upload a file</p>
\$44 STC @ \$25		<p>Edit Form</p> <p>Delete Form</p>	<p>3 Requirements</p> <p><i>You can Submit this form only after fixing all errors</i></p>	<p>REC</p> <p>INV</p> <p>CCP</p> <p>Upload a file</p>

Once these requirements have been met a Green Submit button will appear. This shows that the form is now ready to be submitted for Compliance Checking.

✔ *Form is ready to be submitted*

REC

INV

CCP

PHD

[Submit](#)

[Upload a file](#)

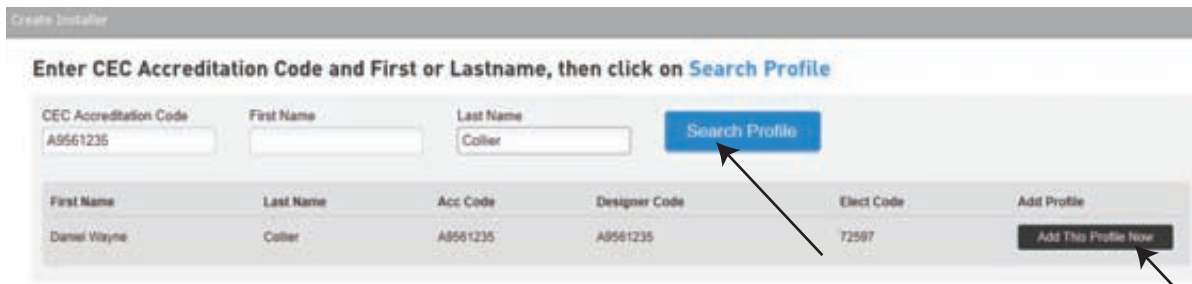
← *Press 'Submit' to submit to Agent*

Installers

The installer centre allows you to view all the installers that are currently active in your account. When adding a new installer, click on the + button and this will direct you to adding a new installer, enter the CEC Accreditation code of the installer, along with their first or last name.

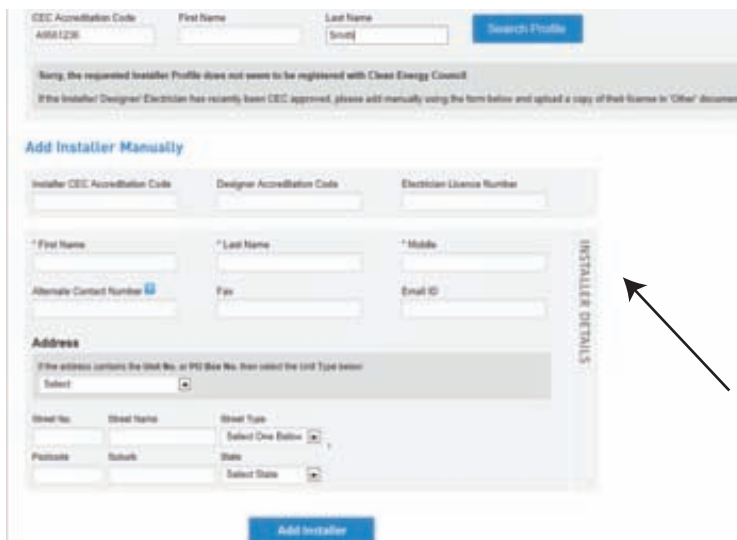


In accordance with ORER (Office of Renewable energy Requirements) each installer needs to be CEC approved. FormBay's search matches up with the latest CEC approved installers list.



1. Enter Accreditation Code and first name or last name
3. Click on 'Search Profile' this will bring up the matching results
4. Click on 'Add This Profile Now'

If your installer is newly registered and is not found, enter in the installer manually. When submitting the form please upload the installers certified certificate in the section 'Others' documents, in the upload centre.



Enter in newly accredited Installers details

Contact:

If you have any queries or issues with using FormBay please don't hesitate to contact:

Tarryn Cotezee

Client & Compliance Manager

P: 02 8003 5478

M. 0406 837 148

E. tarryn@formbay.com.au