ASSURANCE PLATFORM USER MANUAL FOR PROJECT DEVELOPER

Version 1.0

November 2024

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1| INTRODUCTION

Welcome to the User Guide for the Assurance Platform. This guide is designed to help project developers use the various features, functionalities, and workflows available within the assurance platform.

The launch of this assurance platform is part of a wider digitalisation strategy and will help deliver verified impact more efficiently while maintaining the integrity that Gold Standard-certified projects are known for. For more information visit Gold Standard website.

2| REGISTRATION AND LOGIN

From 05 December 2024, the Gold Standard Assurance Platform can be accessed by visiting this URL in your browser of choice: https://assurance-platform.goldstandard.org/

Registration is handled by the Gold Standard Administrator team. New Project Developer users can request a login by following the steps outlined in the Assurance Platform Authentication Manual.

3| PROJECT DEVELOPER USERS

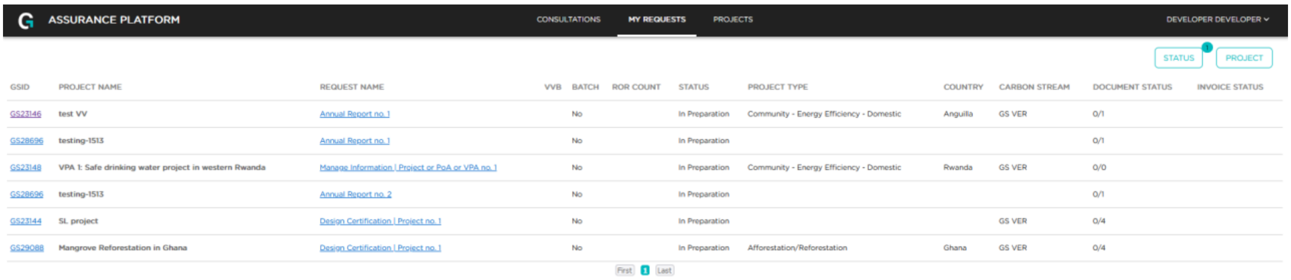
As a Project Developer on the new Assurance Platform, you have the capability to create new projects and input all necessary information seamlessly. This includes defining project crediting periods, setting project locations, and specifying any additional details for locations or transitioning projects similarly to how details were entered in the previous system.

You can access a view of all listed projects, as well as any new projects directly linked to your user profile and platform account, ensuring you stay updated on all relevant activities.

Additionally, you have visibility into any ongoing public consultations related to projects, enabling you to monitor feedback and engagement with the broader community. This functionality provides a streamlined approach to managing project details, from creation through to consultation, all within a centralized platform.

4| MY REQUESTS VIEW

4.1 | List View



GSID	PROJECT NAME	REQUEST NAME	VVB	BATCH	ROR COUNT	STATUS	PROJECT TYPE	COUNTRY	CARBON STREAM	DOCUMENT STATUS	INVOICE STATUS
GS23146	test VV	Annual Report no. 1		No		In Preparation	Community - Energy Efficiency - Domestic	Anguilla	GS VER	0/1	
GS28696	testing-1513	Annual Report no. 1		No		In Preparation				0/1	
GS23148	VPA 1: Safe drinking water project in western Rwanda	Manage Information | Project or PoA or VPA no. 1		No		In Preparation	Community - Energy Efficiency - Domestic	Rwanda	GS VER	0/0	
GS28696	testing-1513	Annual Report no. 2		No		In Preparation				0/1	
GS23144	SL project	Design Certification | Project no. 1		No		In Preparation			GS VER	0/4	
GS29088	Mangrove Reforestation in Ghana	Design Certification | Project no. 1		No		In Preparation	Afforestation/Reforestation	Ghana	GS VER	0/4	

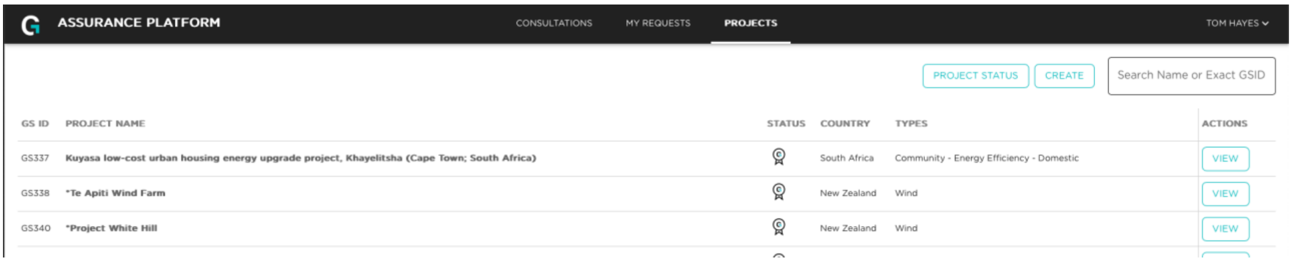
The **My Requests** list displays all requests currently associated with your account. If you own projects containing these requests, you can click on a Project GSID to view detailed project information or click through on the ‘Request Name’ hyperlink for specific request details and navigates to any open actions to undertake on the request.

This list also provides a comprehensive overview of each request, including the assignment status of any Validation & Verification Body (VVB), the current request status, and key details like location and review round count. In the "Document Status" column, you’ll see indicators such as 0/1, 1/1, or 1/2, which reflect the number of required documents uploaded to each request, helping you quickly assess completion progress.

4.2| Filters & Searching

This list view also offers filtering options to help you refine the displayed requests. The available filters include "Status" and "Project," which will appear only if applicable options are present in this list. By default, the "Status" filter is set to show new requests that are “in preparation” to be actioned by a project developer. To broaden your view, you can untick this filter, allowing you to see all requests associated with your account. You can use the filter boxes to search for specific terms if it’s an extensive list of requests, making it even easier to locate requests or projects.

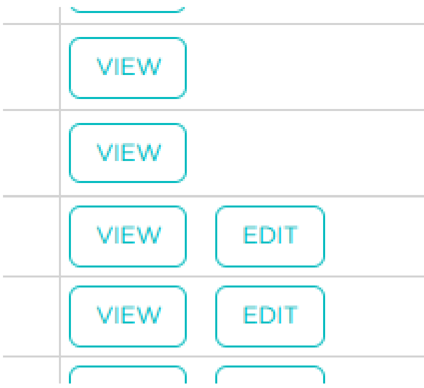
5| PROJECTS VIEW



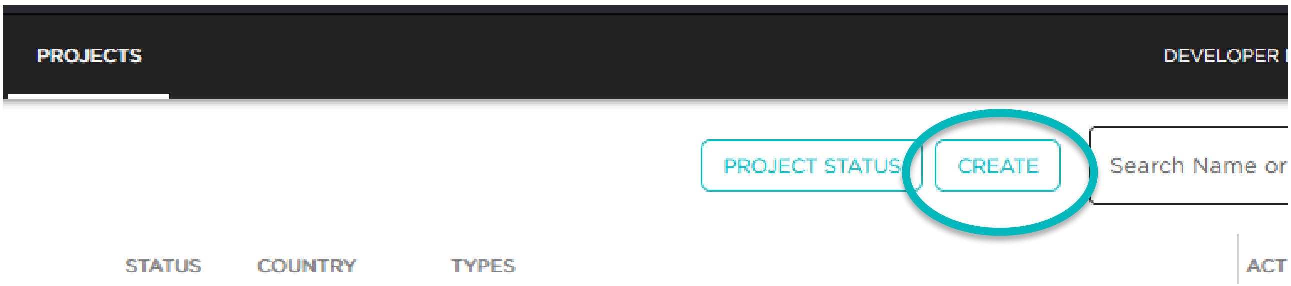
5.1 | Project List View

The **Projects** tab provides an overview of all listed and certified projects. If you're linked to any new or non-listed projects, these will also appear in your view, giving you a comprehensive look at all relevant projects associated with your account. To streamline navigation, you can filter this list by project status or search by project name or GSID, making it simple to locate specific projects and check their status or details at a glance.

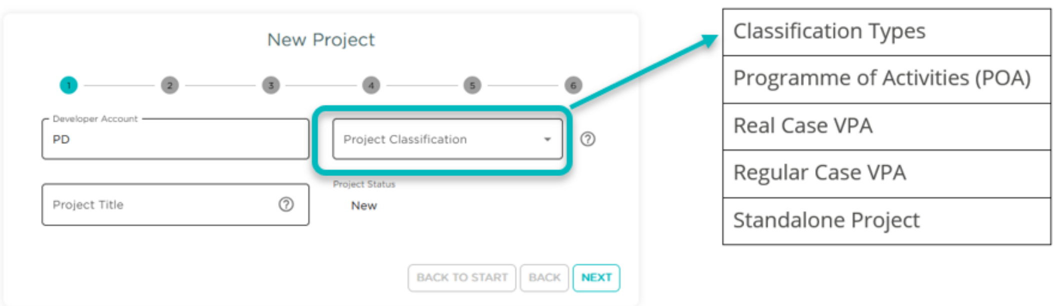
From this list, you can either view listed projects or, if you own or are assigned to certain projects, you'll also have the option to edit them. Simply click the "View" or "Edit" buttons beside each project row to access these functions.



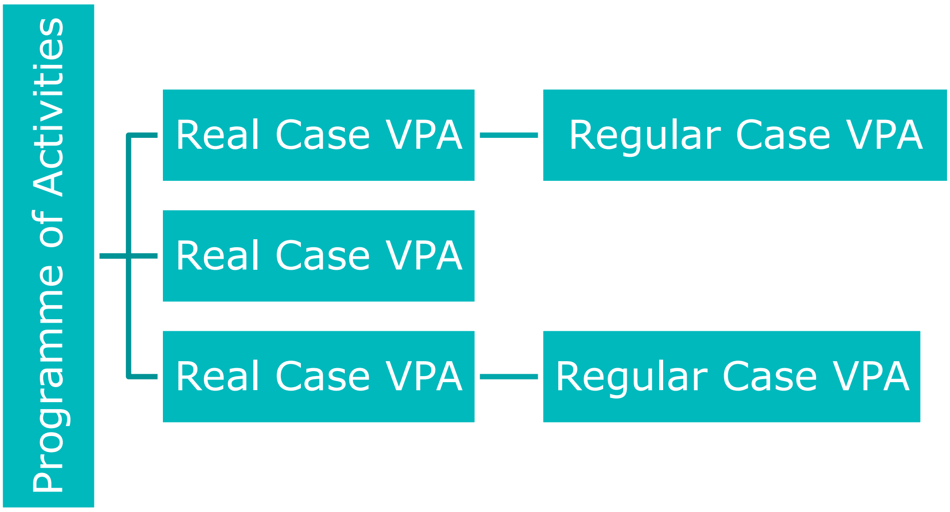
6| PROJECT CREATION

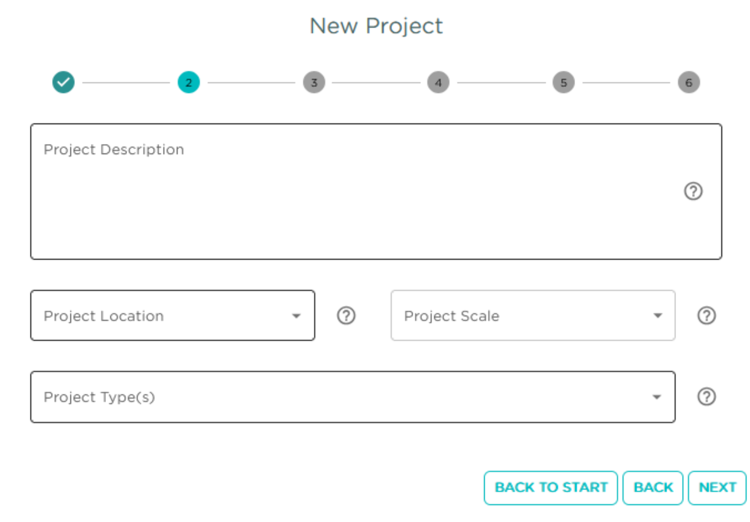


As a Project Developer, your account will be assigned to a new project automatically, a project classification can be chosen on the first step – depending on which project classification you choose you may be able to choose a Programme of Activities (PoA) for this project to fall under.



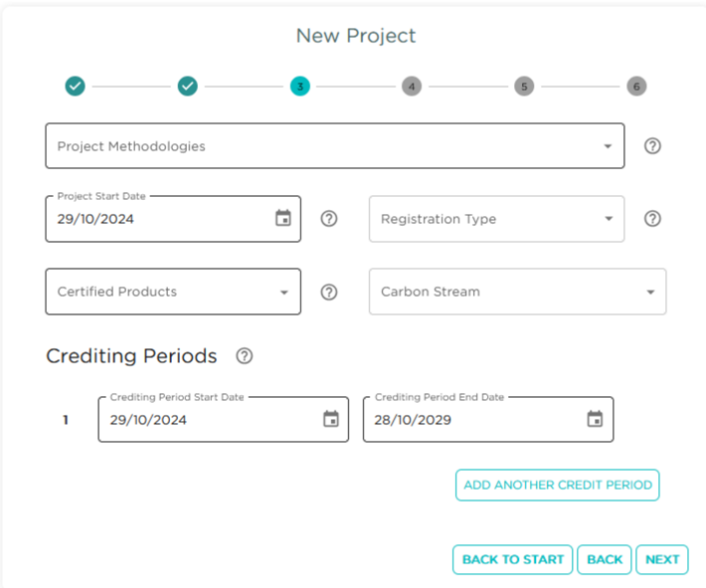
Example Project Classification Structure

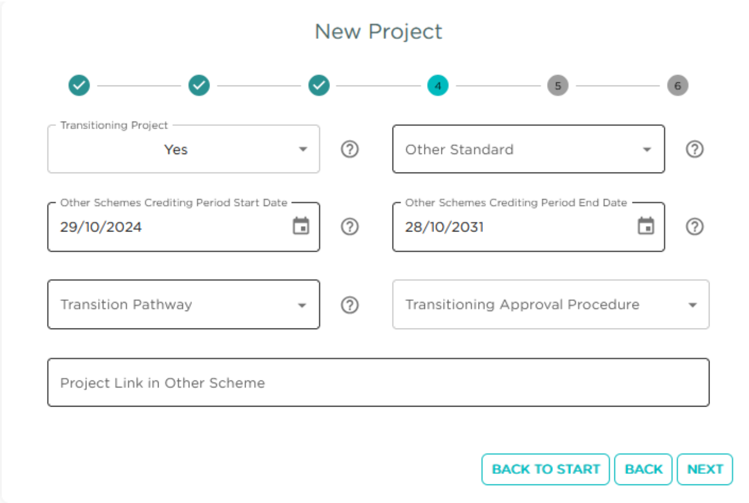




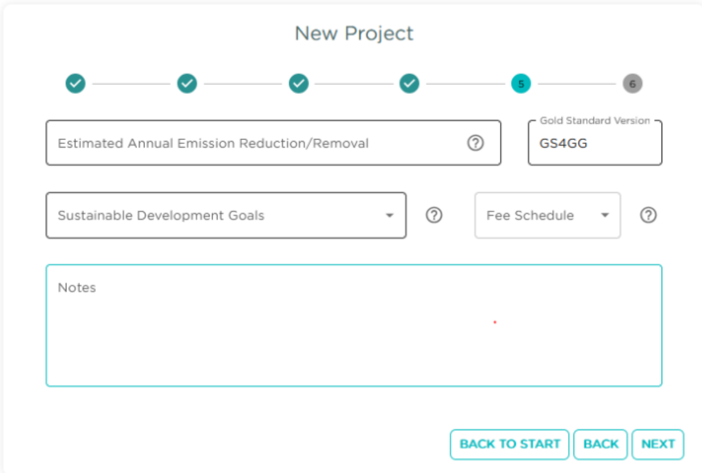
On step 2 of the create project wizard you are able to enter a description for the project, choose project location(s), the scale (size) of the project and what type of project it is that you are creating.

On Step 3 of the project creation wizard, you are able to input multiple project methodologies, related project registration types, certified products and carbon streams. You are also able to enter the start and end dates for 1 or multiple crediting periods.





If a project is transitioning to Gold Standard from a different standard, Step 4 allows you to set the transition project information, if the project isn't a transition project then you can select "No" and move on, otherwise fill out all fields relating to transitioning project.



In Step 5 of the project creation wizard, you have the option to specify Emission Reduction Amounts, select Sustainable Development Goals (SDGs) relevant to the project, and configure Fee Schedules. This step also provides a dedicated section for any additional notes, allowing you to include further project details or special considerations. From here you can then review all information that has been entered into the creation wizard and submit the project.

7| PROJECT UPDATES

After successful project creation, new projects will be visible in the **Projects** tab and can be found by filtering to 'New' projects, or by using the search function.

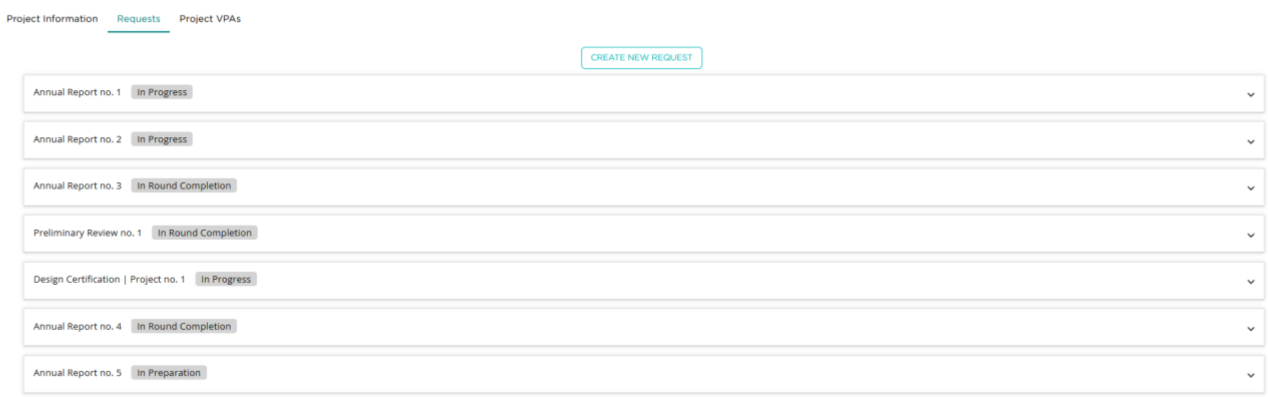
You can update the details of any projects you have created. This feature allows you to edit any initial information entered in the project creation wizard or add details that may have been missed or were unavailable at the time of project creation.

8|REQUESTS

8.1| Requests Summary

Once a project has been created, or for any existing projects, you can view and manage requests by navigating to the **Requests** tab within the project information page. Here, you'll find all relevant request details, including attached documents, comments, and the current request status.

If you are the project owner and the request is in an actionable state, such as "In Preparation" for project developers, you have additional control options. You can upload documents, update or cancel the request, and submit it to the next stage in the process. Additionally, you can create new request directly within the project.



8.2| Creating a Request

Different types of requests are available for different stages of the certification process. The type of request defines the workflows to be followed, the data required, the documents to be uploaded and who it is to be assigned to.

8.2.1| Standalone Requests

To create a new request, click the Create New Request button within the Requests tab of a project.

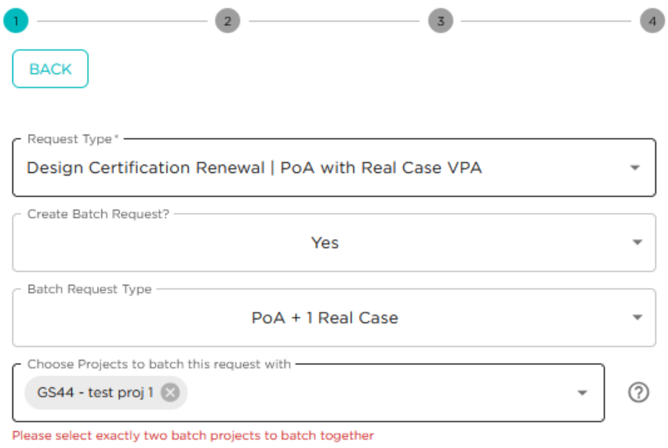
From here, you can select the request type. Depending on the type chosen, the request may be "batchable." For standalone requests, you'll need to specify a Crediting Period ID, which is sourced from your project, also enter an Emission Reduction Amount. You will see the required documents needed for the request on the second step these will be need to be uploaded during the requests lifecycle.

8.2.2| Batch Requests

If you intend to batch the request, ensure your project is linked with other projects within the correct hierarchical structure to enable batching.

Batchable Request Type	Description
PoA + 1 Real Case	Program of Activities (PoA) with 1 Real Case
PoA + 1 or more Real Case	Program of Activities (PoA) with multiple Real Cases
Real Case + 1 or more Regular Case	A Real Case with one or more Regular Cases
2 or more Regular Case	Two or more Regular Cases

The available batchable request types depend on the classification of the project being created. After selecting the batch type, you can choose related projects to include in the batch. These projects must already be linked to the project you're creating a request on.



Depending on how many projects are chosen to batch with, the create request wizard will automatically generate a new ‘Step’ for each batch allowing you to enter the details for each request in the batch. Once finished you are presented with a batch summary to revise what you have entered before creating the whole batch.

8.3| Updating Requests

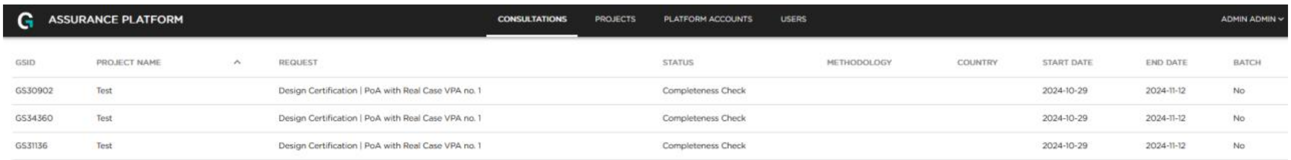
Once a standalone or batched request has been created and is still in the "Preparation" phase (and not cancelled), you can update its details by selecting the **Update Request** button in the actions panel. This allows you to make any necessary changes to the request information before advancing it to the next stage.

8.4| Submitting Requests

When you have completed all activities on a request and are ready to forward it to the next actioner typically the Validation & Verification Body (VVB) or Gold Standard Assurance Review Management (ARM) Team click the **Submit Request** button. This will open a dialog indicating whether the request requires an audit. If an audit is necessary, you’ll have the option to select a VVB. If you’re uncertain of the VVB at this stage, you may leave it blank, and the ARM Team will assign it later. Once you’re satisfied with the request details, proceed by clicking **Submit**. Please note: Once submitted, you will no longer have access to update the request.

8.5| Public Consultations

You can view requests that are currently open for public consultation. On the **Consultations** page, the public can review basic project and request information and submit comments on these requests. To access this, simply navigate to the **Consultations** page from the menu.



Project Developers will be notified of public comments received via assurance platform notification. The project developer and assigned VVB and can view them by selecting the project from the **Consultations** page.