

ASSURANCE PLATFORM USER MANUAL FOR VALIDATION AND VERIFICATION BODIES (VVB)

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INTRODUCTION

Welcome to the Validation and Verification Bodies (VVBs) User Guide for the Assurance Platform. This document is designed to help VVBs use the various features, functionalities, and workflows available within the assurance platform.

The Assurance Platform is for projects that are applying our standard, Gold Standard for the Global Goals (GS4GG) to certify climate and sustainable development impact. The platform facilitates efficient document management and workflows for projects going through the Gold Standard certification cycle. It is integrated with the Registry and is used to book and manage reviews/project documentation. Organisations need to be developing Gold Standard projects to have access to this Platform.

The assurance platform is part of a wider Gold Standard 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 <u>Gold Standard website</u>.

1 | ACCESS AND LOG-IN

The Gold Standard Assurance Platform can be accessed by visiting this URL in your browser of choice: <u>https://assurance-platform.goldstandard.org/</u>.

1.1 | Login page

The landing page for the Assurance Platform is the "Login Page". This is where you will input your login credentials to access the platform.

If you don't have access yet, refer to the steps in paragraph 1.2.

	CONSULTATIONS	LOGIN					
	Login						
	Username *						
	Password*						
	Forgotten password?						
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1.2 | Access for new users

To request access to the Assurance platform, the VVB management and GS-approved Auditor can fill out and submit the <u>user registration form</u>.

The Gold Standard Administrator team will review the request and initiate the user account setup. You will receive an email containing a username and a "Temporary Password".

Next, follow these steps to complete the setup of your user account:

- 1. <u>Go to the Assurance Platform</u> in your preferred web browser.
- 2. On the landing page, input your username and the temporary password provided into the "Password" field, and click on the "Login" button.
- 3. You will be taken to the following screen, prompting you to finish setting up your account.

Last Name *		
New Password		
Confirm New Passwo	ord	
(Password has at least 8 characters.	
¢	Password has special characters.	
c c	Password has special characters. Password has a number.	
((Password has special characters. Password has a number. Password has a capital letter.	
c c	Password has special characters. Password has a number.	

- 4. Fill out all fields, ensuring that your passwords match and meet all listed criteria.
- 5. Click on the "Submit" button to complete your account setup.
- 6. You will be returned to the platform login page where you can now login to your new user account.

NOTE:

A GS-approved auditor is an auditor who has successfully passed the Gold Standard examination within its 36-month validity period.

If you experience any issues whilst completing the login process and are unable to access the Assurance Platform, please send an email to the Gold Standard Helpdesk team at vvb@goldstandard.org.

1.3 | Password Reset

If you have forgotten your password, you can initiate a password reset by following these steps:

- 1. <u>Go to the Assurance Platform</u> in your preferred web browser.
- 2. On the landing page, select "Forgotten password?" underneath the login area.
- 3. A page will display "Forgot Password", enter the email associated with your user account and press the submit button.
- 4. You will receive an email with the subject "Gold Standard Forgotten Password".
- 5. Check your email for the verification code.
- 6. Enter the verification code into the "Verification Code" field on the platform page, fill out the "New Password" and "Confirm New Password" fields, ensuring that both passwords match and meet all the listed criteria.

Enter Verification Code

Th	is will be sent to the email you provided, if it is registered with us.
New Password -	
Confirm New	Password
×	Password has at least 8 characters.
×	Password has special characters.
×	Password has a number.
×	Password has a capital letter.
×	Password has a lowercase letter.
×	Passwords match.
	SUBMIT

- 7. Click on the "Submit" button to complete your password reset.
- 8. You will be returned to the platform login page where you can now login with your new password.

1.4 | Multiple Users and Accounts

The platform enables multiple users to access a single account. Access is granted at the **Account level** rather than at the project level, meaning all users can view all projects within an organization's account.

Auditors working with several VVBs can get access to the account of each VVB they are associated with. This is possible with following considerations:

- The GS approved auditor should have similar arrangement as full-time employee with the VVB to ensure proper oversight and accountability.
- To grant platform access, the VVB management needs to verify the auditor's association and submit an access request to Gold Standard.
- Throughout the engagement, the VVB maintains responsibility for monitoring and managing their auditors' platform access.

Note: Externals are not allowed to get access to a VVB account on the Assurance platform. Please refrain from sharing login credentials with other staff members or externals.

1.5 | Email notifications

Only the Account holder or Admin of the VVB account receives the email notifications related to any activities performed in the Assurance platform.

If you have a team's email address where you would like to receive the email notifications, you can request this by sending an email to <u>vvb@goldstandard.org</u> and mentioning the team's email address. Our team will replace this as the main contact email of the account.

Note: Email notifications cannot be deactivated.

2 | ROLES IN THE ASSURANCE PLATFORM

2.1 | User Roles and Key Functionalities



2.2| The journey of a request



3| USING THE ASSURANCE PLATFORM

The Assurance platform consists of three main tabs: **Projects** (see <u>paragraph 3.1</u>), **My requests** (see <u>paragraph 3.2</u>) and **Consultations** (see <u>paragraph 3.3</u>).

When you log-in to your account, you land on the **My requests** tab. Projects and specific requests are assigned to your VVB account by either a Project Developer or Gold Standard, allowing you to access and audit requests specific to your assignment.

Watch here the full video of the Assurance platform.



3.1 | "Projects" Tab

G	ASSURANCE PLATFORM	CONSULTATIONS	MY REQUESTS	PROJECTS			VVB VVB V
						PROJECT STATUS Search N	ame or Exact GSID
GS ID	PROJECT NAME			STATUS	COUNTRY	TYPES	ACTIONS
GS337	Kuyasa low-cost urban housing energy upgrade project, Khayelitsha (Cape Town; South Africa)			ę	South Africa	Community - Energy Efficiency - Domestic	VIEW
GS338	*Te Apiti Wind Farm			ę	New Zealand	Wind	VIEW
G\$340	*Project White Hill			ę	New Zealand	Wind	VIEW
GS343	*4.5 MW Biomass (low density Crop Residues) based Power Generation unit of Malavalli Power Plant Pvt Ltd. (300011	D		Q	India	Renewable Energy - Biomass or Liquid Biofuel - Electricity	VIEW

The **Projects** tab provides an overview of all projects at various stages of the certification process, organised in GSID order for easy reference. If you're linked to any new or non-listed

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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.



Watch this video for more information.

3.2| "My requests" tab

G	ASSURANCE PLATFORM			CONSULTATION	S MY REQUEST	S PROJEC	TS				VVB VVB V
									REQUEST STATUS	PROJECT	PROJECT DEVELOPER
GSID	PROJECT	REQUEST NAME	REQUEST STATUS	PROJECT DEVELOPER	RECEIVED DATE	COUNTRY	ROR COUNT	ROUND OF REVIEW END DATE	PROJECT TYPE	CARBON STREAM	ASSIGNMENT STATUS
<u>G523143</u>	Demo: Renewable Energy Project	Design Certification Project no. 1	In Audit	Demo Project Developer	01/11/2024	Burkina Faso	0		Small Low Impact Hydro	GS VER	Pending
<u>GS23143</u>	Demo: Renewable Energy Project	Performance Certification Project no. 1	In Audit	Demo Project Developer	01/11/2024	Burkina Faso	0		Small Low Impact Hydro	GS VER	Pending
GS23145	Test Project POA	Design Certification Project no. 1	In Audit	Klima ohne Grenzen gGmbH	01/11/2024		0				Pending
					First 🚺 Last						

The **My Requests** tab displays all requests currently associated with your account. To view detailed project information, click on a Project ID in the 'GSID' column. To view specific request details and navigate to any open actions to undertake on the request, click on the hyperlink in the 'Request Name' column.

You can sort this list view by any column with a hyperlinked header, i.e. in the screenshot above you can see you will be able to sort by 'Round of Review End Date'.

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3.2.1 | Filters & Searching

The **My Requests** list view also offers filtering options to help you refine the displayed requests. The available filters include "Status", "Project" and "Project Developer" 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 audit" to be actioned by a VVB. 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 easier to locate requests or projects.

3.2.2 | Accept or decline a request

When you receive a request from a Project Developer, this will show in the **My Requests** tab. The request status column will be 'In Audit' and the column 'Assignment Status' will be Pending.

G	ASSURANCE PLATFORM					TS PR	OJECTS	CONSULTATIONS		VAISHALI VATSA 🗸 🗸
GSID	PROJECT	REQUEST NAM	E REQUEST STATUS	ROJECT DEVELOPER	RECEIVED DATE	COUNTRY	ROR COUNT	ROUND OF REVIEW END		PROJECT DEVELOPER
<u>G523145</u>		Design Certification Project.no. 2	In Audit	Nima ohne Grenzen g SmbH	04/11/2024		0			Accepted
<u>G523143</u>	Demo: Renewable Energy Project	Design Certification 1 Project no. 3	In Preparation	E emo Project E eveloper	13/11/2024	Burkina Faso	0		Small Low Impact Hydro GS VER	Cancelled
G523150	Smoke Test POA	Design Certification Project no. 2	In Audit	E eveloper Project Geveloper	15/11/2024	United Kingdom of Great Britain and Northern Ireland	0		Afforestation/Reforestation GS VER	Pending
						First	1 Last			

To access the request, click on the Project name hyperlink in the column 'Request name'. In the next page, 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.

G ASSURANCE PLATFORM	MY REQUESTS	PROJECTS	CONSULTATIONS	VAISHALI VATSA
Project Information Transition Scheme Request	s Project VPAs			
Design Change With WB no. 1 Completed -	Approved			~
Design Certification Project no. 1 Completed	- Rejected			~
Issuance no. 1 In Assignment				~
Issuance no. 2 In Preparation				~
Design Change With VVB no. 2 Cancelled				~

Find the request in status 'In Audit' and click on it to expand the fields. Under 'Actions' you will have the option to Accept or Decline the request.

Design Certification Project no. 2 In Audit	^
Status	Actions
🛱 Request Status In Audit 🗮 Round of Review Count 0	ACCEPT / DECLINE REQUEST
Documents Status 0 / 4	
Request Design Type Certification Project	
Request Start 15/11/2024 Date	
Documents	

After accepting the request, the Assignment status changes to 'Accepted'. You will gain full access to view the documents, comments, and other pertinent information related to the project, as well as to any available actions associated with the request, such as uploading documents, enabling you to conduct your audit.

If you decline the request, the Project Developer will be notified accordingly. The Assignment status of the request will change back to 'In preparation'. This process ensures that all project audits are handled efficiently and with transparency across all assignments on your VVB account.

Note: All the users active in the VVB account will see the request in the 'My Request' tab.

It is not possible to assign an Auditor to a project in the Assurance platform. This must be done offline.

Watch this video for more information.



3.2.3 | Handling Accepted Requests

Once you have accepted the request of the PD, this will show in the 'In Audit' status.

To facilitate your audit, you will have full access to the following in the assigned request:

- View documents, comments, and other relevant information.
- Update request details.
- Upload documents on behalf of the PD, audit reports, and review forms.
- Cancel a request (if required).
- Advance the request to the next stage.

These options are accessible on the request itself under 'Actions'.

Actions	
8 CANCEL REQUEST	
C UPDATE REQUEST	

In the Documents section of the request, you will see the uploaded documents, and any missing documents, by navigating to the 'Required Documents' and 'Other documents' tabs. In this section you can also download documents.



Note: Actions on the platform are irreversible, therefore we recommend to upload documents and review requests carefully. Audits (for validation and verification) are not conducted on the platform.

Once the audit is finalized and the complete documentation has been uploaded, you can

submit the request to the Gold Standard ARM team for a Completeness Check.

To submit your request, click on the button 'Submit request' under Actions.



The request status will change from 'In Audit' to 'Completeness check'.

Note: If the Gold Standard ARM team has any follow up requests during the completeness check, the project status will change back into 'In Audit'. An email will be sent to both the VVB and the PD with an update on the status change.

Watch this video for more information.

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3.2.4 | Review of Requests

After a successful completeness check, the Gold Standard ARM team will progress the request into the 'In Assignment' stage. An expert reviewer is assigned to conduct a detailed review, and the request status changes to 'In progress'.

If there are any open findings, the request will be sent back to the VVB and PD in status 'In Audit'. The VVB and PD will need to address the findings.

Once the review round is completed, the Gold Standard ARM team will update the status into 'In Round completion'.

Note: If the review is in progress, additional documents cannot be uploaded. The documents may be uploaded by the VVB once the round of review has concluded, and the request is back to 'In Audit' status.

Watch this video for more information.



3.2.5 | Review Response Timelines

Gold Standard has introduced new response timelines for project developers and VVBs when responding to Corrective Action Requests (CARs), Clarification Requests (CLs) and observations to set clear expectations for a more structured and predictable certification process.

	Preliminary Review	Design Review	Performance Review	Combined Design and Performance Review			
Completeness check timeline for GS ARM team			1 week				
Completeness check response timeline for PDs/VVBs (to provide any missing info)	2 weeks						
GS Assurance Review timeline (Min. / 1 round)	4 weeks	4 weeks	3 weeks	6 weeks			
PD/VVB Review Response timeline	2 weeks	6 weeks	6 weeks	6 weeks			

More information about the timelines for project developers and VVBs can be found in the <u>Principles and Requirements</u> and <u>Rule Update: Standards, Assurance Model Update</u>.

3.3 | "Consultations" tab

On the **Consultations** tab, you can view requests that are currently open for public consultation.

A two-week public consultation period is conducted on the Assurance platform after a successful 'Completeness check' and is required for the review of all design, performance, crediting period renewal, and design change requests. During this period:

- Non-confidential documents are publicly accessible for review and feedback.
- Comments are visible in the request section.
- The VVB and PD are notified about any comments.
- The process is managed by Gold Standard via the Assurance Platform.

To access this tab, simply navigate to the **Consultations** page from the top menu and select the project from the list.

G ASSI	G ASSURANCE PLATFORM			JRANCE PLATFORM				ASSURANCE PLATFORM			CONSULTATIONS	PROJECTS	PLATFORM ACCOUNTS	USERS					ADMIN ADMIN ~
GSID	PROJECT NAME	^	REQUEST			STATUS		METHODOLOGY	COUNTRY	START DATE	END DATE	BATCH							
G\$30902	Tost		Design Certification PoA with Real Case VPA no. 1			Completeness Check				2024-10-29	2024-11-12	No							
GS34360	Test		Design Certification PoA with Real Case VPA no. 1			Completeness Check				2024-10-29	2024-11-12	No							
GS31136	Test		Design Certification PoA with Real Case VPA no. 1			Completeness Check				2024-10-29	2024-11-12	No							

4| HELP AND RESOURCES

To access the Assurance Platform, click on this link: <u>https://assurance-platform.goldstandard.org/</u>.

To get familiar with the Assurance Platform, refer to the following materials:

- New Digital Assurance Platform and Management System launched
- <u>Recording VVB Webinar: Introduction to the Assurance Platform</u>
- <u>Assurance Platform Demo for VVBs</u>
- Recording Drop in Session 1: Gold Standard VVB Assurance platform
- <u>Recording Drop in Session 3: Gold Standard VVB Assurance platform</u>

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For questions, consult our FAQs on the <u>New Assurance Model and Management Process for</u> <u>Gold Standard Project Certification</u>.

5| CHANGE HISTORY

Version N.	Publication Date	Summary of the changes	Previous Version N.
1.0	November 2024	New document	N/A
2.0	July 2025	Revised and reorganized the entire document for clarity and usability. Significant revisions to all sections with additions of new paragraphs, user information, links to the platform demo and clarification notes.	1.0