QUICK REFERENCE GUIDE FOR SERVICE PROVIDERS

COMMERCIAL

PROGRAM PARTICIPATION

- SP requests and submits program application in service provider portal
- Status of submitted application will be known from Home dashboard/My Application tab
- PM reviews and approves program participation
- Notification sent to SP on application approval

PROJECT CREATION

PHASE: IA OPEN (INITIAL APPLICATION)

- SP creates project
  - » Add sites
  - » Upload e-files
  - » Upload required support documents
  - » If e-sign opted for host customer agreement, project moves to submitted when SP and customer complete the signature
  - » If wet sign opted, upload the signed agreement and manually submit the project

PHASE: FA OPEN (FINAL APPLICATION)

- On PM approval, project moves to **Final Application (FA)** from **IA** phase
  - » SP may add or update the measure for e-files
  - » Upload documents related to measure added such as specification, design document, etc.
  - » Review and submit project
- PM sends the project for pre-inspection
- Once inspection is completed, PM approves the project, SP receives an email to e-sign the reservation of funds addendum
- On completion of signature by SP and Oncor, project moves to **Installation Notice (IN)** phase and construction may begin

PHASE: IN OPEN (INSTALLATION NOTICE)

- On PM approval, project moves to IN phase. Upon project completion:
  - » If there is a change in measure savings, upload the final updated e-file
  - » Upload requires support documents
  - » If e-sign opted for installation certification notice, project moves to submitted when SP and customer complete the e-signature
  - » If wet sign opted, upload the signed installation notice and manually submit the project
- PM sends the project for post-inspection
- PM reviews the inspection results and approves the project

PHASE: SR OPEN (SAVINGS REPORT)

- On PM approval, project moves to **Savings Report (SR)** phase
  - » SP e-signs/wet signs the savings report and submits the project
- PM reviews the document and approves the project for final payment
- Payment made to service provider as per the approved incentive amount

WORKFLOW SUMMARY

1 SUBMIT PROGRAM APPLICATION

PM APPROVES APPLICATION

2 PHASE: IA OPEN
1. Create project
2. Add sites & upload e-files
3. Upload support documents
4. E-sign/wet sign host customer agreement
5. Submit project

PM APPROVES

3 PHASE: FA OPEN
1. Add or update e-files
2. Upload documents
3. Submit project

PROJECT SENT FOR PRE-INSPECTION

4 PHASE: FA PRE-INSPECTION COMPLETED
E-sign reservation of funds document

PM APPROVES

5 PHASE: IN OPEN
1. Upload final updated e-file if there is a change
2. E-sign/wet sign installation notice customer certification
3. Submit project

PROJECT SENT FOR POST-INSPECTION

6 PHASE: IN POST-INSPECTION
PM reviews and approves project after inspection

PM APPROVES

7 PHASE: SR OPEN
1. Upload signed savings report
2. Submit project

8 PHASE: SR APPROVED
Payment made to service provider

SP – Service Provider   PM – Program Manager

ONCOR®

ENERGY EFFICIENCY PROGRAM