Instruction Guide

ENERGY EFFICIENCY PROGRAM

ONCOR

ABOUT EEPM 2.0

A dedicated and secure online portal, EEPM 2.0 makes it easier for service providers to participate in Oncor's Energy Efficiency programs.

With enhanced functionalities and an enriched user interface, the portal allows service providers to create and submit projects and apply for incentives with minimal effort. The new EEPM 2.0 will reduce the time it takes to create and submit projects and eliminate data entry errors in savings calculations. For example, with the introduction of the e-signature feature, service providers can now send system-generated documents—such as the host customer agreement and installation notice certificate—to customers for their e-signature directly from the portal. In addition, the Commercial measures can now be entered directly in the system without the hassle of uploading a measure e-file.

Whether service providers are starting a new project or editing an existing one, this guide covers everything they need to know about EEPM 2.0.

Program Participation

SERVICE PROVIDER DASHBOARD

EEPM 2.0 features a new dashboard that offers quick and easy access to the information you need most often, including:

- Program options in various stages:
  - o Active Programs
  - o Program Applications
  - o Eligible Programs

- Recent project data based on specific categories:
  - o Action Required
  - o Recently Viewed Projects
  - o Projects Nearing Completion Date

- Insurance expiration highlights

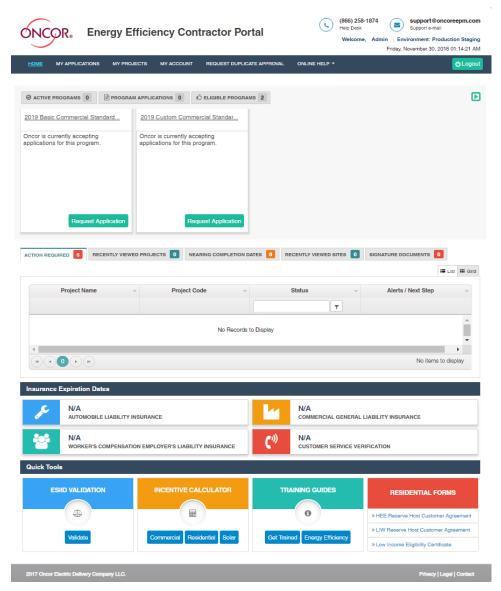- ESI ID validation

- Incentive calculator

- Training guide link

Figure 1

PROGRAM OPTION ACTIVITY

Eligible Programs

Eligible Programs indicates the number of programs a service provider is qualified or approved to apply for.
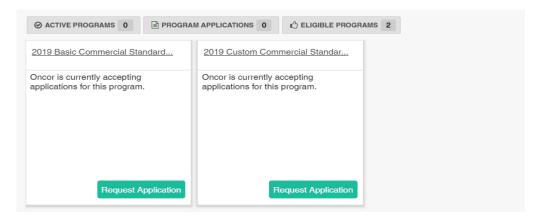
Figure 2

- To view the specific programs, you are eligible for, click on the **Eligible Programs** tab.
  - o The corresponding programs will appear in a horizontal series.
  - o If the program you want to apply for is not displayed, email the support desk/program manager.

- Navigate right or left using the arrow keys.
- Click on Request Application to start the program application process.
- Once the time-frame for the program application expires, the **Request Application** button will

be disabled, and service providers will no longer be able to apply.

Program Applications

Before you begin the Program Application process you must have your insurance agent submit valid insurance forms (auto, general liability, and workers compensation) to eepminsurance@oncor.com.

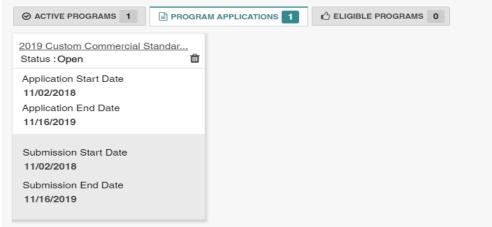**Program Application** will appear with the "Open" status as shown in *Figure 3*.

Figure 3

- Click on the **Program Option** link as shown in *Figure 3* to view the **Program Applications** screen.

Figure 4

1. Check the box at the top right to have your company's name added to the Oncor/TALOT website for customers.

2. Select (check the appropriate boxes) for **Measures I can install.**

3. **Areas that I serve** can be selected in two ways:

    3a. Import the county list from previously submitted applications by selecting the appropriate item from the drop-down menu.

    3b. Select the county manually. Based on the county chosen, the corresponding cities and zip codes will be populated automatically. You can then uncheck any cities and/or zip codes that you do not serve.

4. Upload mandatory **Documents** such as (if Applicable for the selected Program Option)

- **Program Addendum**
- **Financial References**

5. Click on **Submit Application**

After you submit a program application, an Oncor program manager will review your submission. Once the review is completed, you will receive an email notifying you of the decision on your application. If your application is approved, you will have access to the program in the **Active Programs** list of your dashboard as shown in *Figure 5*.

⊘ ACTIVE PROGRAMS **1**	📄 PROGRAM APPLICATIONS **1**	👍 ELIGIBLE PROGRAMS **0**

2019 Basic Commercial Standa... ▶

Program Budget

Total	$300,000.00
Remaining	$271,958.25

My Budget

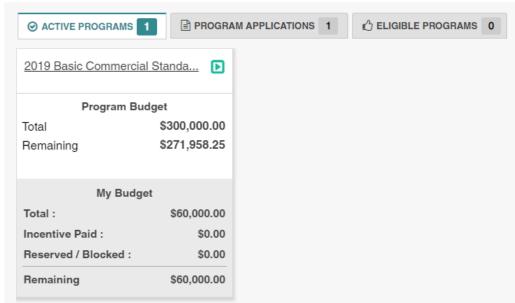| Total :	$60,000.00
Incentive Paid :	$0.00
Reserved / Blocked :	$0.00
Remaining	$60,000.00

Figure 5

If your application is denied by the program manager, it will be listed in the **Program Applications** tab with a "Rejected" status. You would then need to correct any inaccurate or missing data and resubmit the application for review.
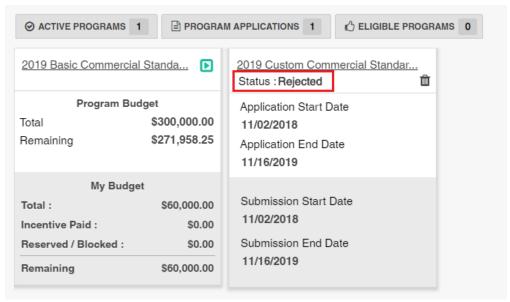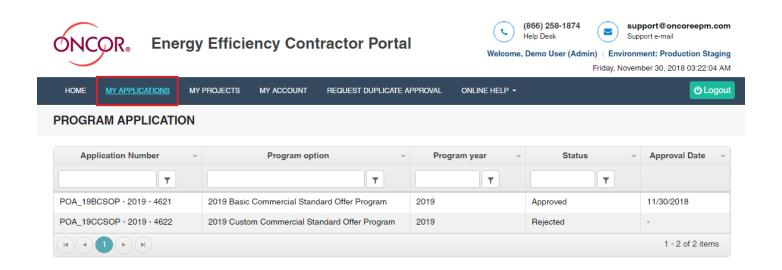

Figure 6

Any applications you have submitted can also be viewed from the **My Applications** tab, which displays a list of each program application and its corresponding status, as shown in *Figure 7*.

Figure 7

Starting a New Commercial Project

My Projects

EEPM 2.0 simplifies the process of starting a new commercial project.

- Go to your dashboard.
- Click on **My Projects** from the menu bar or the program name under the active programs. The system will navigate to the project list page. Note that navigating to projects by clicking the program name will display only the projects associated with that program.
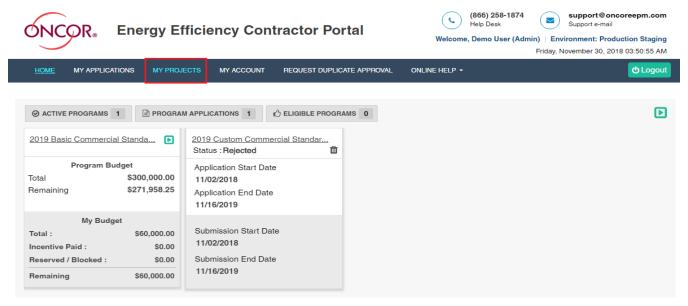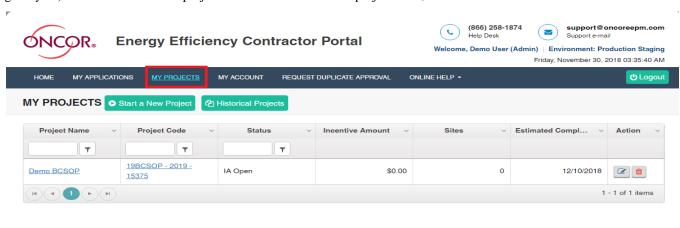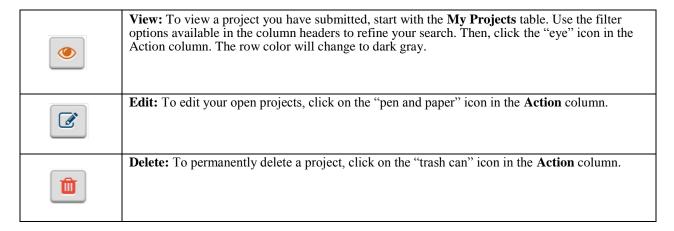

Figure 8

The **My Projects** screen includes options to **Start a New Project** and view **Historical Projects** (projects from the previous program year). The table will list all projects with details such as the project code, status and incentive amount.

Figure 9

Action Buttons

👁	**View:** To view a project you have submitted, start with the **My Projects** table. Use the filter options available in the column headers to refine your search. Then, click the "eye" icon in the Action column. The row color will change to dark gray.
✏	**Edit:** To edit your open projects, click on the "pen and paper" icon in the **Action** column.
🗑	**Delete:** To permanently delete a project, click on the "trash can" icon in the **Action** column.

Start a New Project

1. From the main menu bar, click on **My Projects.**

2. Click on the **Start a New Project** button below the main menu bar.

Figure 10

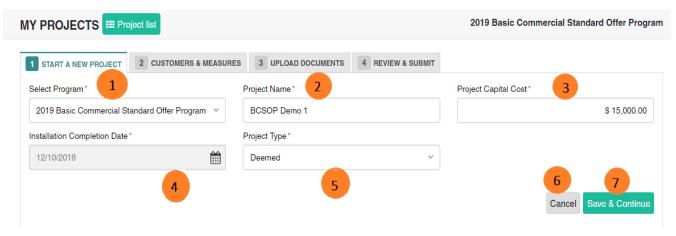The system will navigate to the **Start a New Project** screen as shown in *Figure 11.*

Figure 11

1. Select the program option from the **Select Program** drop-down menu.

2. Enter the **Project Name**.

3. Enter the **Project Capital Cost**.

4. Select **Estimated Completion Date** from the calendar.

5. Choose a project type from the **Project Type** drop-down menu.

6. Click on **Save & Continue** to save the project. The system will navigate to the next tab.

7. To discard the project, click on **Cancel.**

Customers & Measures

The Customers & Measures tab is used to add site and measure information. Follow the guidelines below when adding sites and including measure information for a project.

Add Sites

From the **Customers & Measures** tab, click on the **Add Site** button in the project information header to open a list of fields related to the site information.
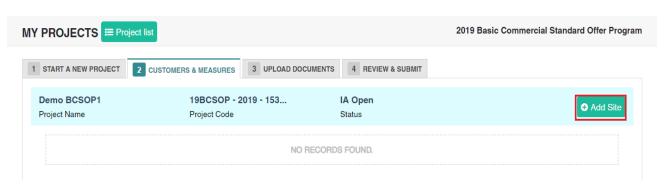

Figure 12

The **Add Sites** page requires the ESI ID information or a meter number to verify the customer data.

1. Enter the following information:

   1a. The last seven-digits of your ESI ID

   OR

   1b. Your full nine-digit meter number and include LG after (xxxxxxxxxLG).

2. Then click **Get Info**.

   The system will display the site form with the customer's service address associated with the ESI ID and meter number, along with the service provider's contact information as shown in *Figure 13*.

3. Enter **Customer Name** and select **Group Type**.

4. Select the existing template to auto-fill the **Service Provider Inspection Contact Informatio**n. To save the new template, check **Save as template** at the bottom of the screen and provide a name for the template.

5. Fill in the **Customer Signature Contact Information**. The documents requiring signatures from the customer will be sent to the email address provided in this section.

6. Click on the "verify" check box at the bottom of the page to confirm you have entered the correct site address.

7. After you click on the "verify" check box, the **Save** button will appear. (The **Save** button will only appear after the "verify" check box has been selected.)

8. Click the **Save** button. The added site will be shown in the grid. Repeat the above steps to add multiple sites to the project.

Figure 13

Add Measures

1. To add a measure, click **Add Measure** button corresponding to the applicable site as shown in *Figure 14*.

Figure 14

2. Select the measure you want to add from the **Add Measure** pop-up displayed and Click **Save** button. The measure will be saved.
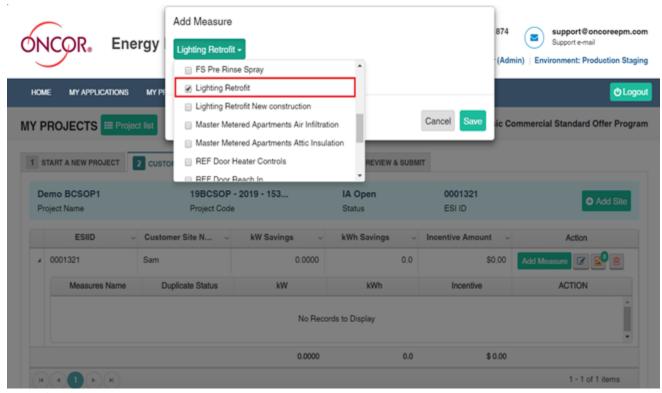

Figure 15

3. Click on the **pencil and paper** icon against the selected measure to add the measure line items as highlighted in *Figure 16*.
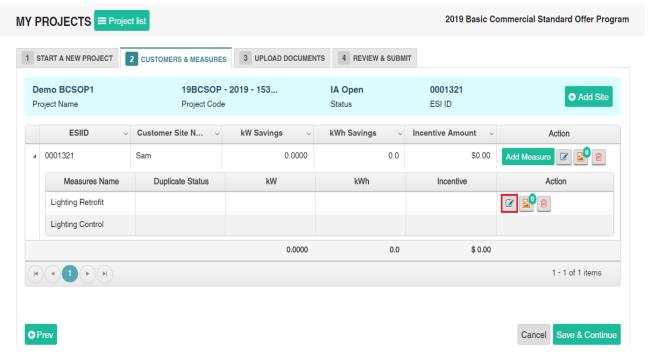

Figure 16

4. Upon clicking the **pencil and paper** icon, the measure add page will be displayed as shown in *Figure 17*. Click on the **+Area** button in that page to add the Area information.
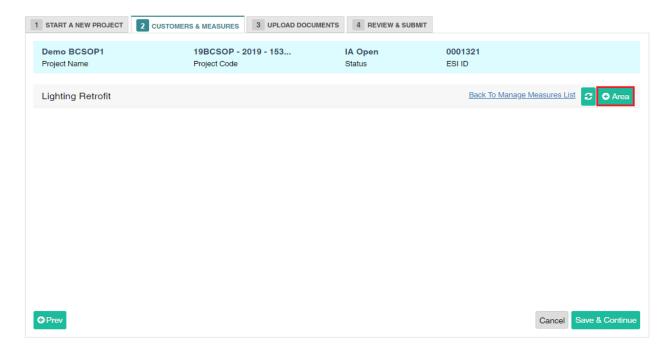

Figure 17

5. Upon clicking the +**Area** button, the Area pop-up will be displayed. Enter the necessary information in the pop-up displayed and click on the **Add** button.
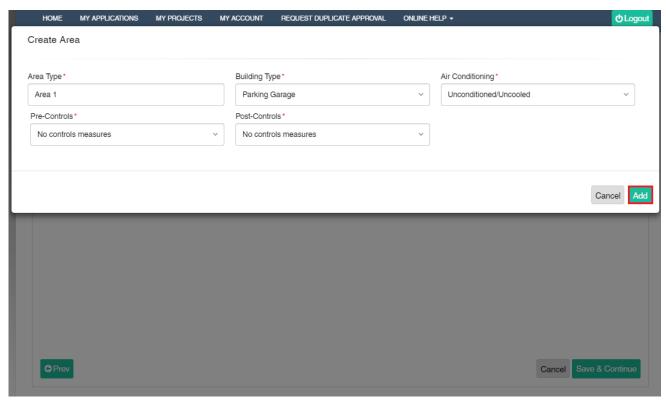

Figure 18

6. Once the Area information is added successfully, expand the grid and click on the +**Sub Area** button to add the Sub Area information and click the **Floppy disk** icon to save the added Sub Area information.
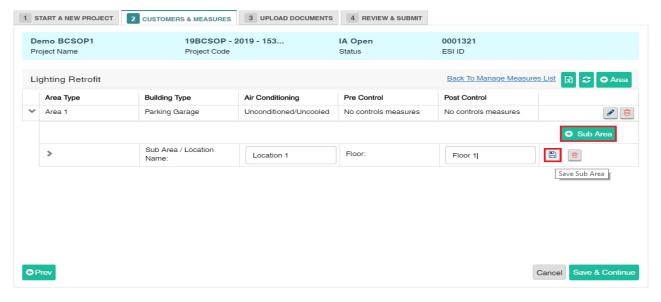

Figure 19

7. Once the Sub Area is added successfully, expand the grid by clicking on the **arrow** icons as highlighted in *Figure 20*. Then click on the + **Add New Items** button to add the measure line item.
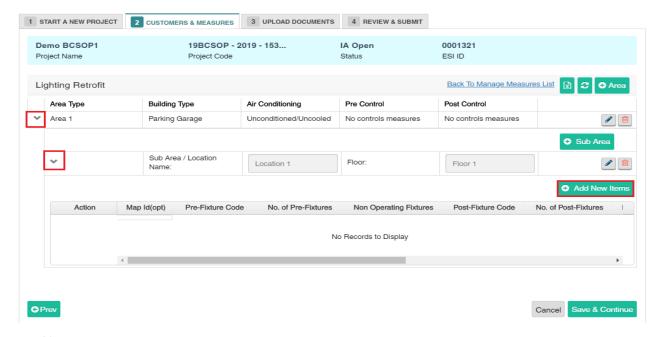

Figure 20

8. On clicking the +**Add New Items** button, the Measure Line item pop-up will be displayed for the Lighting Retrofit measure as shown in *Figure 21*. Click on the **Lens** icon highlighted in the pop-up displayed to search for the Fixture Codes.
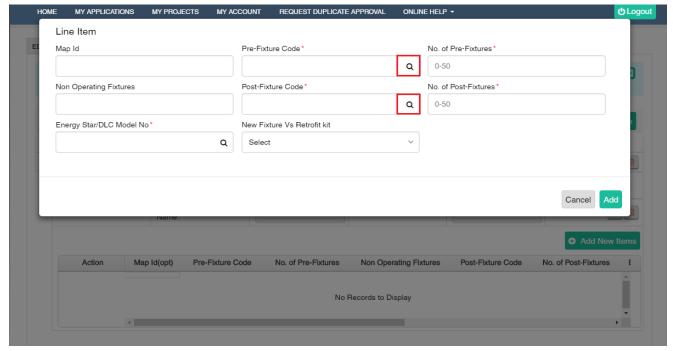

Figure 21

9. On Clicking the **Lens** icon, the list of Fixture Codes will be displayed in a pop-up screen. You can then select the fixture code from the list to be entered in the Pre-Fixture Code and Post-Fixture Code input fields.
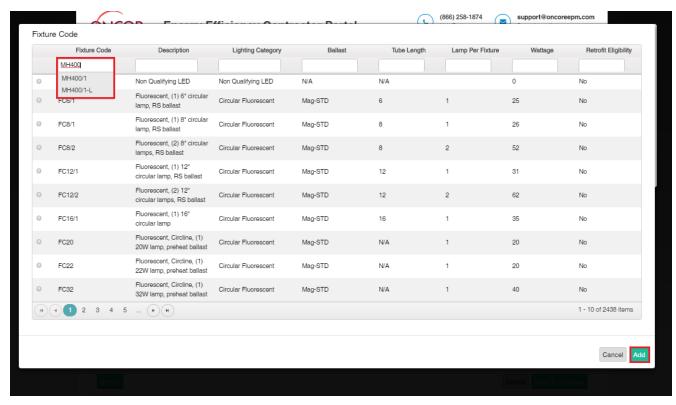

Figure 22

10. Once the Fixture code inputs are entered, click on the **Lens** icon as highlighted in *Figure 23* to search for the DLC Model Numbers.

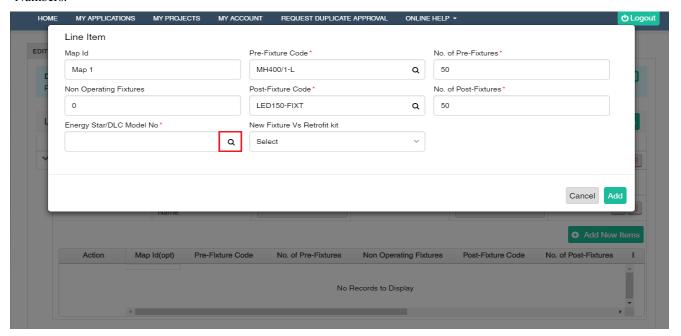

Figure 23

11. Upon clicking the **Lens** icon in the **Energy Star/DLC Model No** field, the pop-up with the list of DLC Model Numbers will be displayed. You can then choose the Model Number from the pop-up displayed.
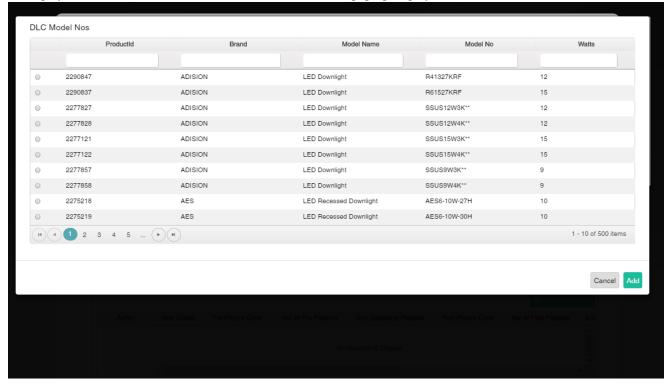

Figure 24

12. In the Line Item pop-up displayed, enter all the required information and click on the **Add** button to add the measure line item.
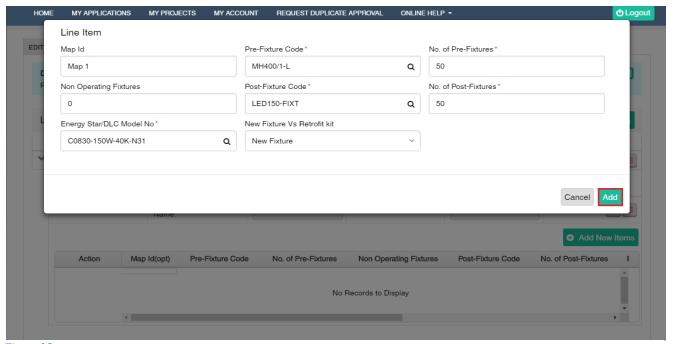

Figure 25

13. Click on the **Calculator** icon to calculate the incentive for the added line item for the Lighting Retrofit measure.
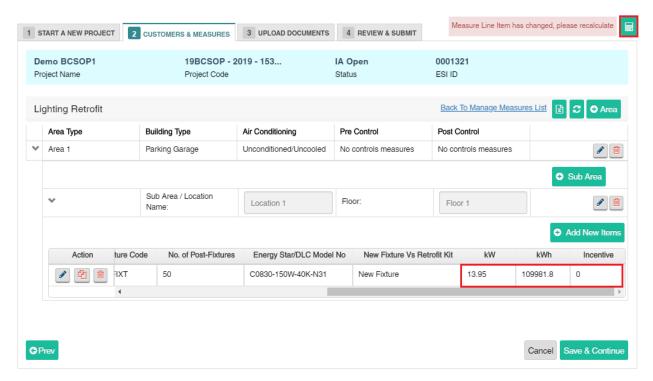

Figure 26

14. Upon clicking the **Calculator** icon, the Incentive will be calculated successfully for the added measure line item(s) as shown below. **Note: You need to expand the grid to view the complete measure details.**

Figure 27

15. If the measure line items that you want to add are identical or very similar, you can copy/paste the line item by clicking on the **Copy** icon and then update any specific details if needed.

Figure 28

16. Once the line item(s) are copied, you can click on the **pencil and paper** icon and update the corresponding line item as shown in *Figure 29*. **Note: You need to expand the grid to view the complete measure details.**

Figure 29

17. If a measure line item(s) needs to be deleted, you can delete the selected line item by clicking on the **delete** icon.

Figure 30

18. Upon deleting the measure line item successfully, click on the **Calculator** icon to recalculate the incentive for the updated measure line item(s). **Note: You need to expand the grid to view the complete measure details.**
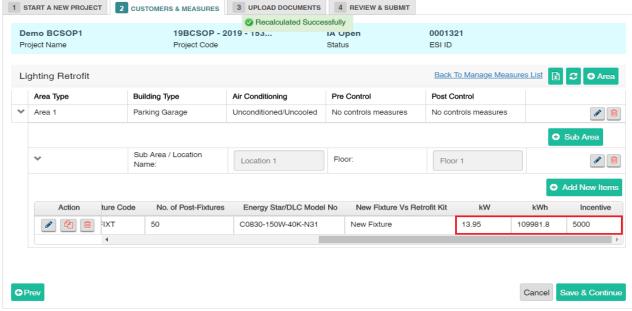

Figure 31

19. Click on the **Export to Excel** icon as highlighted in *Figure 32* to export the measure line items to MS Excel sheet.

Figure 32

20. You can also copy the measure line items from MS Excel document and paste it in the system by placing the mouse over the measure line items grid.

Figure 33

21. Upon clicking the **Find and Replace** icon as highlighted below, the Find and Replace pop-up will be displayed.

    a)   In the Find and Replace pop-up displayed, select the **Attribute** value and enter the input value in the **Find What** field and click **Find All** button. The number of occurrences of that **Find What** value will be displayed.

    b)   You can then enter the value in the **Replace With** field and click **Replace** button to replace the found values with the replace values in the added measure.

Figure 34

22. In the below example, the **'Floor'** Attribute is chosen and the 'Find What' value is entered as '**Floor 1'**. On clicking the **Find** button, '**4 record(s) found**' message is displayed. Now enter the 'Replace With' value as '**Floor 2**' and on clicking the **Replace** button, the '**Floor 1**' value will be replaced with the '**Floor 2**' value wherever it has occurred.

Figure 35

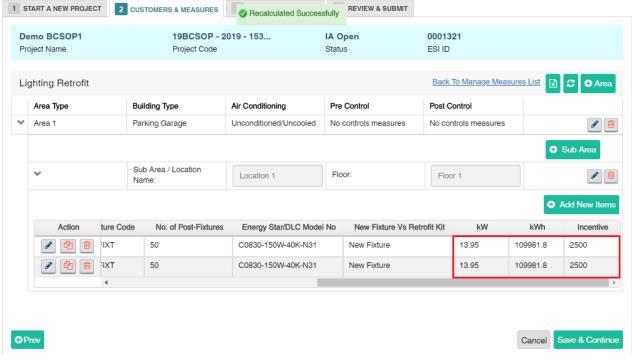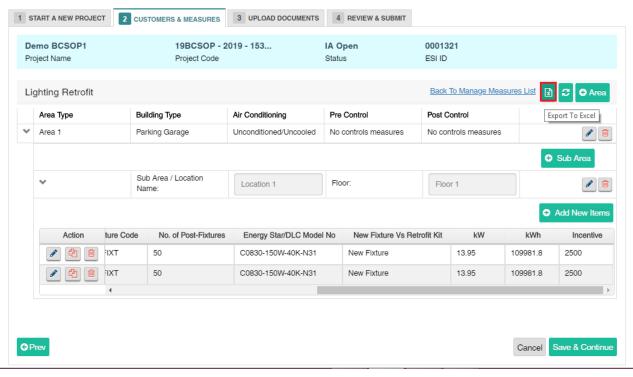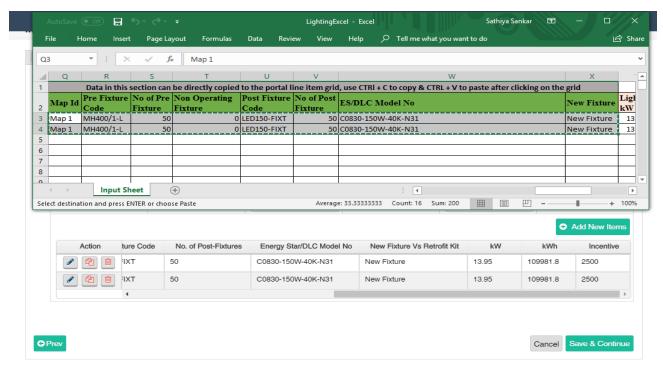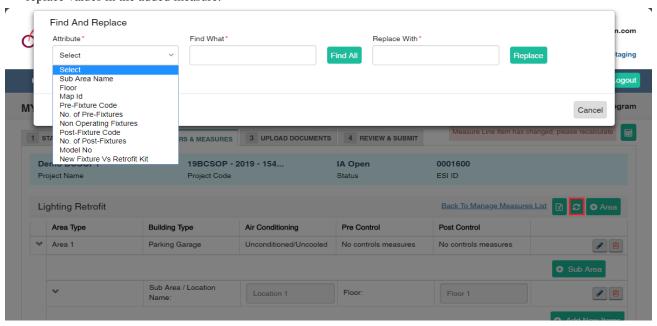**23.** On clicking the **Replace** button, the 'Floor 1' value is now replaced with the 'Floor 2' value as highlighted in *Figure 36*.

Now click on the **Calculator** icon to recalculate the incentive for the added measure line items.

Figure 36

24. Once the incentives are recalculated successfully, click on the **Back to Manage Measure List** link to go back to the **Customers and Measures** Tab. **Note: You need to expand the grid to view the complete measure details.**

Figure 37

25. In the **Customers and Measures** tab, you can see the total Savings and Incentive calculated for the added Lighting Retrofit measure.

Figure 38

Edit Site & Measure

- To edit the measure information, click on the **Edit** button in the grid.
- To delete a site/measure, click on the **Trash** button in the grid.
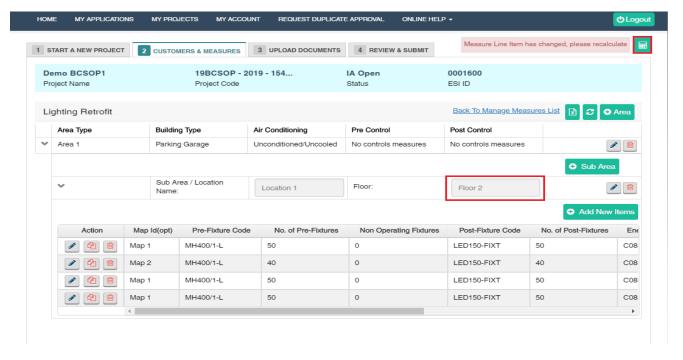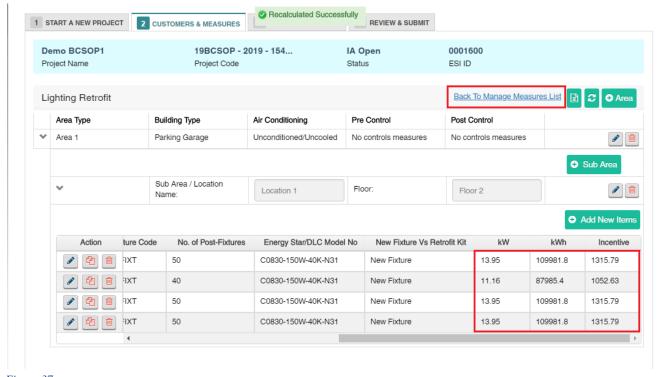- To add/view the Site/Measure images, click on the **Image** button in the grid. It also shows the count of images.

Upload Documents

The **Upload Documents** tab allows service providers to upload all mandatory documents in this section. In each project phase, service providers must upload the signed EEPM system-generated documents which are mandatory for processing the project.

Service providers must submit the following system-generated documents.

Project Phase	Document	Signatories		
		Customer	Service Provider	Oncor
IA	Host customer agreement	Yes	Yes	
FA	Reservation of funds addendum		Yes	Yes
IN	Installation notice certificate	Yes	Yes	
SR	Savings summary report		Yes	

Service providers can use the e-signature feature to get the documents signed. Before sending the documents to recipients for their e-signature, service providers must complete all project data and ensure customer email IDs are provided in the "signatory information" section of the customer site form.

Following the program manager's review, the project status will enter the following phases before approval:

- Initial application phase (IA)

- Final application phase (FA)

- Installation notice phase (IN)

- Savings report phase (SR)

How to send documents for e-signatures

1. To digitally sign the system-generated document, Select the "e-sign" signature option as shown in *Figure 39.*

2. Upload all the required project support documents, including those that are not system-generated.

3. Click **Save & Continue** to navigate to the **Review & Submit** tab.

4. After clicking **Submit** in the **Review & Submit** tab, the project will move to the "Awaiting Signature" state. An email containing a link to sign the document will be sent to the customer email address provided in the customer site form.

5. Once the customer e-signs the document, another email will be sent to the service provider for their signature.

6. Once both signatures are completed, the project workflow will update to the "Submitted" state and the signed document will be updated in the portal.
   Note: If the "e-sign" signature option is selected, the system will not allow the user to manually upload documents against the system-generated documents.

7. Service providers can check on the signature status of the document by clicking on the "pencil" icon.
   Note: Once the document is sent for e-signatures, the project will be in non-editable mode.

8. Service providers can check on the signature status of the document by clicking on the "pencil" icon.

9. Once the document is sent for e-signatures, the project will move into a non-editable mode.

10. To opt out of the e-signature feature after sending the document for e-signatures, click on the "trash" icon. This action will trash the document and make the links inactive, and the project will move back to the "Open" state. Service providers are advised to use the e-signature option only when all the signatories accepted the use of e-signatures.

11. Refer to the separate guide for step-by-step instructions on signing the document received via E-signature.

Work flow operations for e-signature:

Service providers can also complete a manual or "wet" signature by manually downloading the document. Then, click the hyperlink and upload the signed document under the SP Attachments section. For a manual signature, the "Wet sign" signature option should be selected.
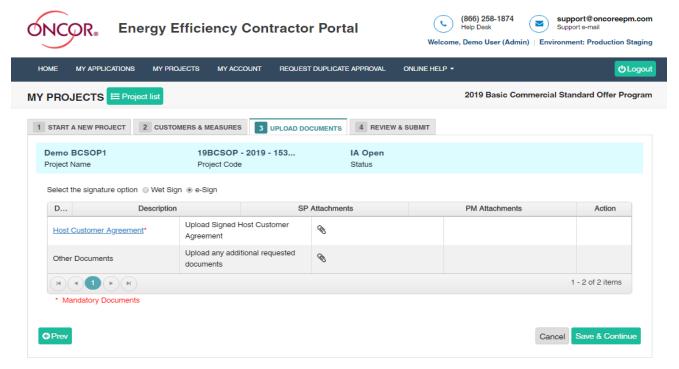
(★) symbol denotes mandatory documents.

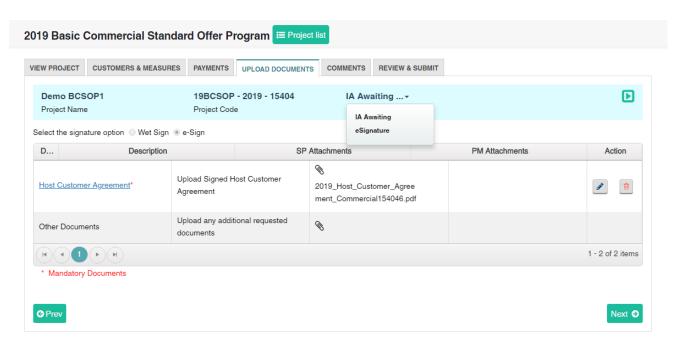*Figure 39*   *Signature option selection*

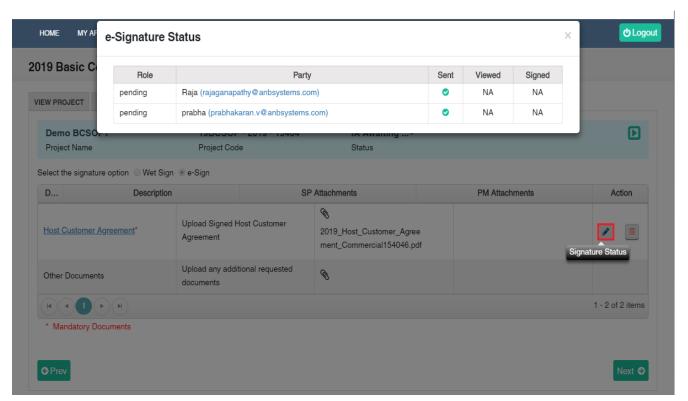*Figure 40*   *Document sent for signature*

Figure 41   *Signature Status of the document*

Review and Submit

The **Review & Submit** page allows service providers to review all the entered information from the **Start a New Project** and **Upload Documents** tabs. Review all information for accuracy before submitting the project.

The **Submit Project** button sends the project to the Oncor program manager's queue. If the "Wet Sign" signature option is selected, the status will immediately change from "IA Open" to "IA Submitted." "E-sign" projects will move to the "IA Awaiting Signature" state, and on signature completion, the project will move to the "IA Submitted" state. An email notification confirming the project submission will be sent to the service provider. Users can access the submitted project from the "**My Project**" page.
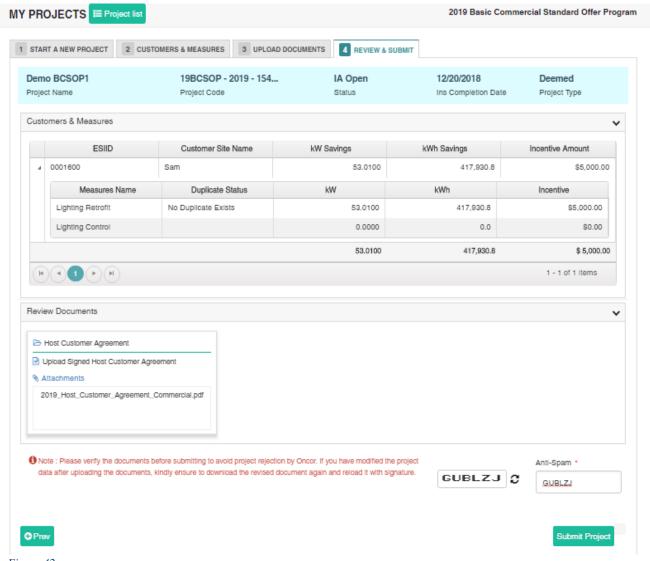

Figure 42

Editing a Project

There are two ways to edit a project:

- Filter and browse **Recently Viewed Projects**.

- Search from the list in the **My Projects** table.

Recently Viewed Projects

The **Recently Viewed Projects** tab, located in the service provider dashboard menu, lists all recently viewed projects.
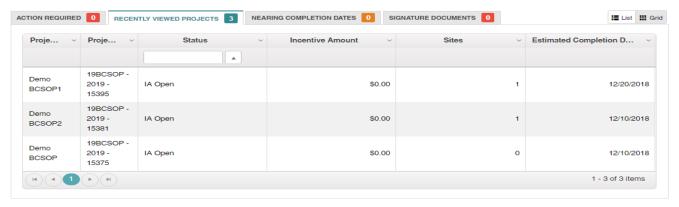

Figure 43

- Filter the project by status under the **Status** column header.
- Review the **Project Name** (first column) and **Project Code** (second column) for a specific project.
- Click on the **Project Code** hyperlink to view and edit the project.

My Projects

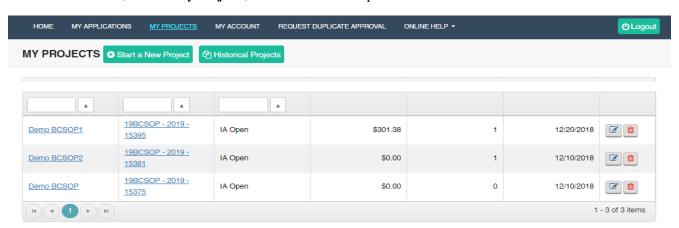From the main menu, click on **My Projects**, located in the service provider dashboard menu.

Figure 44

- Search for the project using the **Project Name** or **Project Code** filters.
- Click on the corresponding icons under the **Action** column to view and edit the project or delete the project in the IA Open phase.

Request for Duplicate Approval

Service providers are not allowed to submit the project if the measure added under the site is duplicated. Duplicate measures must be approved by the Oncor program manager prior to project submission.
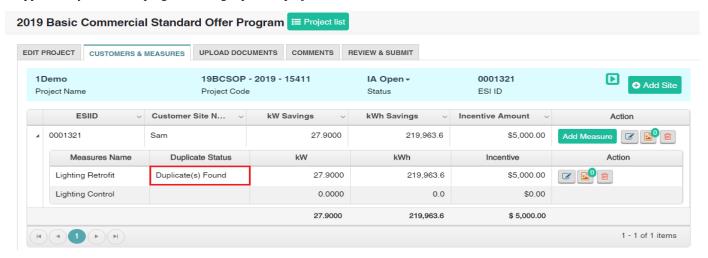

Figure 45

To send the measure duplicate approval request:

1. Navigate to **Request Duplicate Approval** from the main menu.
2. Select the site which has duplicate measure.
3. Enter the comment.
4. Click **Request Duplicate Approval** button. The request will be sent to the program manager for approval.
5. Click on **Measure History** to view complete details of the previously submitted measure.
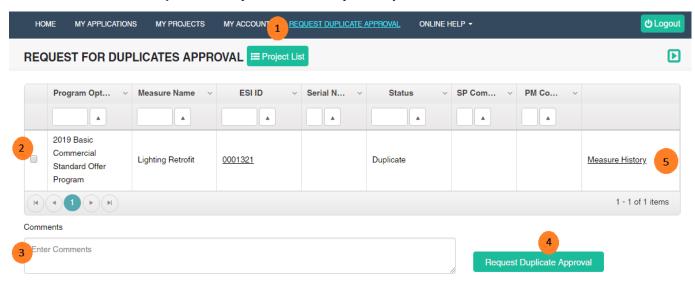

Figure 46

Oncor Program manager reviews the request for duplicate measure and approves/rejects it. Service provider will be notified via email and then can proceed to submit the project.

Thank you

for participating in Oncor's
Energy Efficiency programs. If you
have questions, please email us at
support@oncoreepm.com.