

# Instruction Guide

MULTIFAMILY

EEPM 2.0



ENERGY EFFICIENCY PROGRAM





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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. Service providers are no longer required to complete manual paperwork to submit the host customer agreement and income eligibility certificate. With the introduction of the e-signature feature, service providers can now send system-generated documents to customers for their e-signature directly from the portal. The new and improved process will minimize the time it takes to create and submit projects, and reduce data entry errors in savings calculations.

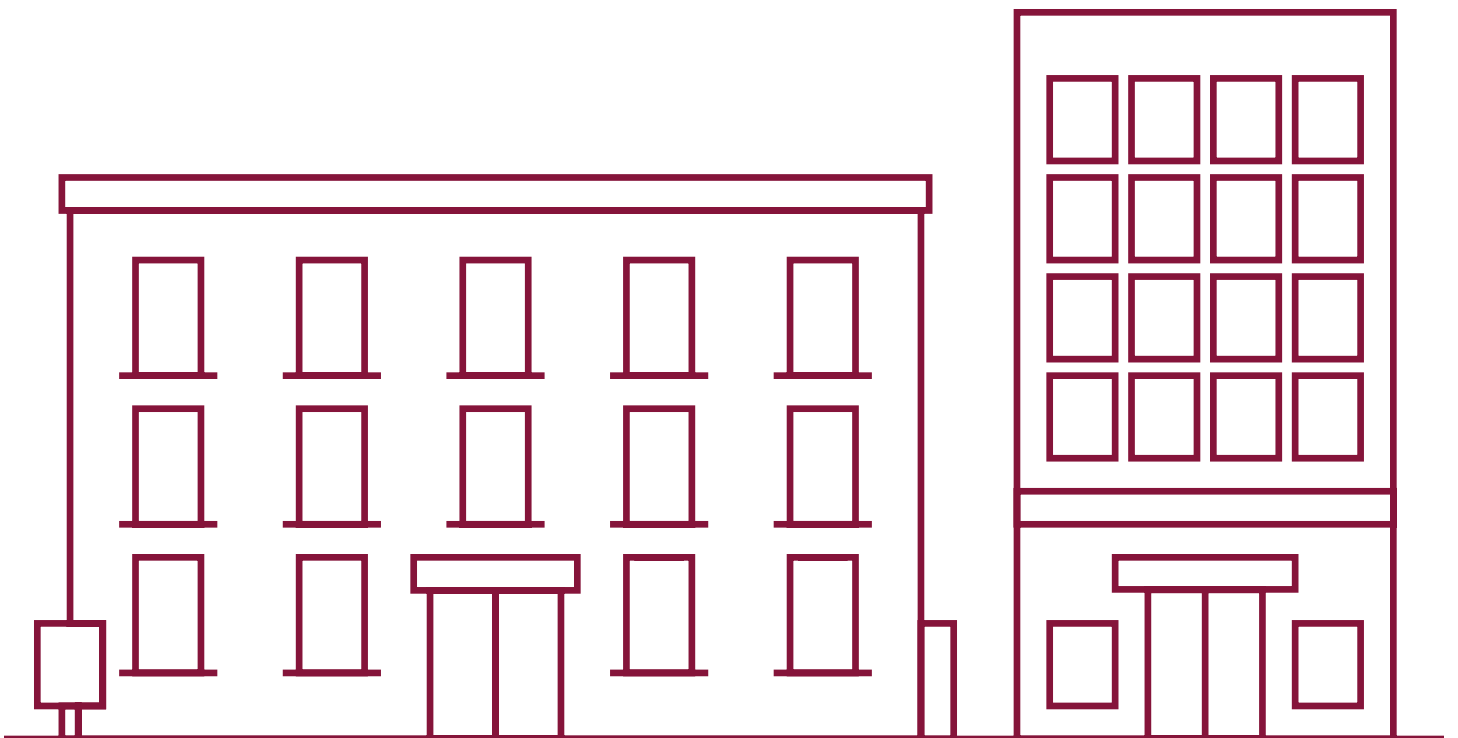
Whether you're starting a new project or editing an existing one, this guide covers everything you need to know when you log in to EEPM 2.0.



# Program Participation

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MULTIFAMILY



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
  - Active Programs
  - Program Applications
  - Eligible Programs
- Recent project data based on specific categories
  - Action Required
  - Recently Viewed Projects
  - Projects Nearing Completion Date
  - Recently Viewed Sites
- Insurance expiration highlights
- ESI ID validation
- Incentive calculator
- Training guide link
- Residential forms

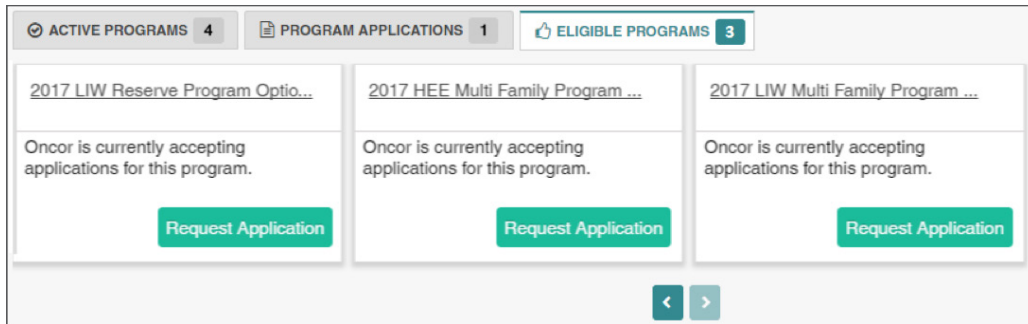
The screenshot displays the Energy Efficiency Contractor Portal dashboard. At the top, it features the ONCOR logo and navigation links for Home, My Applications, Open Customers, My Projects, My Account, Request Duplicate Approval, and Online Help. A user greeting for Justin Lantern (Admin) is visible on the right. The main content area is divided into sections: Active Programs (2), Program Applications (1), and Eligible Programs (1). Two program budget tables are shown, comparing total, allocated, and remaining amounts. Below this is a table of 'RECENTLY VIEWED PROJECTS' with columns for Project Name, Status, Incentive Amount, Sites, and Estimated Completion Date. The table lists three projects: a 2016 Test Solar Project (IA Open), a Developer Test Project (IA Awaiting eSignature), and a Test Train Project (FA Pre-Inspection Completed). Further down, an 'Insurance Expiration Dates' section highlights four key dates for 05/01/2018: Automobile Liability Insurance, Commercial General Liability Insurance, Worker's Compensation Employer's Liability Insurance, and Customer Service Verification. A 'Quick Tools' section provides links for ESHD Validation, Incentive Calculator (with Commercial, Residential, and Solar filters), Training Guides, and Residential Forms (including HEH, LHV, and Low Income Digitally Certificate links).

PROGRAM OPTION ACTIVITY

Eligible Programs

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



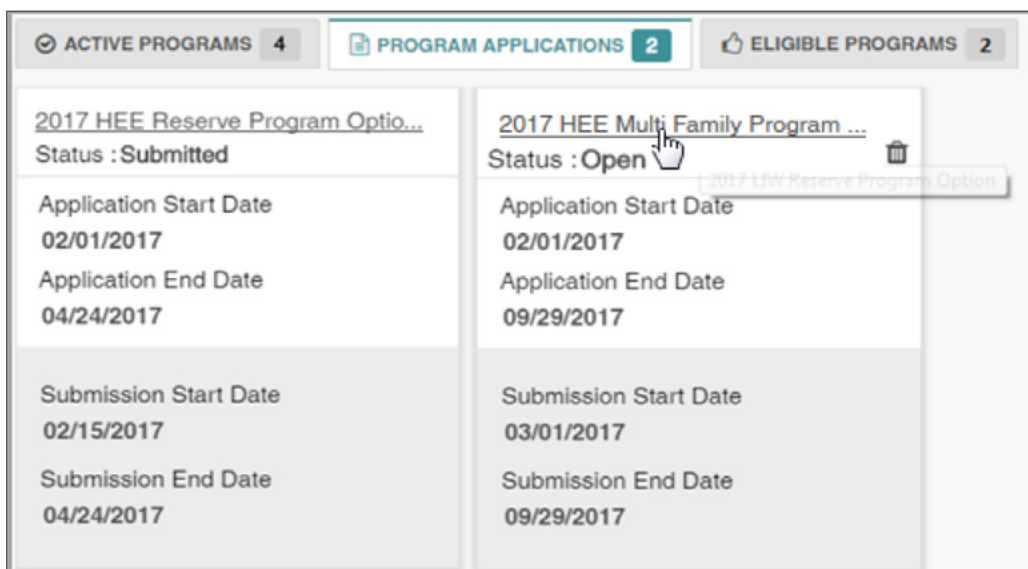


- To view the specific programs, you're eligible for, click on the **Eligible Programs** tab.
  - The corresponding programs will appear in a horizontal series.
  - If the program you want to apply for is not displayed, email the support desk/program manager.
- Navigate right or left using the arrow keys at the bottom.
- 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 comp) to eepminurance@oncor.com.*

**Program Applications** will appear with the "Open" status as shown in the image below.



- Click on the **Program Option** link as shown in the above image to view the **Program Applications** screen.
- The **Program Applications** screen will appear.



**PROGRAM APPLICATION** Application List 2017 HEE Multi Family Program Option

**APPLICATION** **COMMENTS**

**POA\_17HEEMF - 2017 - 13781** 06/07/2017 1

Application No Application Date  I would like my company's information displayed on Oncor's website

**Measures I can install** View Oncor Service Area

Ceiling Insulation  Energy Star Clothes Washer  Wall Insulation  
 Air Infiltration  Aerators  Energy Star Dishwasher  
 Water Heater Pipe Insulation  Showerheads  Energy Star Refrigerator  
 Floor Insulation  Water Heater Jacket  Energy Star Window  
 Window Air Conditioner

**Areas that I serve** 3

Warning you may be disqualified from participating in this program if oncor receives customer complaints indicating that you do not serve the areas you have selected

Import county list from previously submitted application

Import 3a

**County** 3b **City** **Zip Code**

Select All 12 out of 78 Selected  Select All 34 out of 58 Selected  Select All 42 out of 42 Selected

Anderson  Montana  75853  
 Andrews  Tennessee Colony  75861  
 Angelina  Palestine  75802  
 Archer  Poynor  75782  
 Bastrop  Elkhart  75803  
 Baylor  Frankston  75801  
 Bell  Neches  75941  
 Brown  Andrews  75949  
 Cherokee  Diboll  75904  
 Clay  Huntington  75901

**Documents** 4

DOCUMENT NAME	DESCRIPTION	SP ATTACHMENTS	PM ATTACHMENTS
Attach other documents as required	Other Documents		
<a href="#">Program Addendum*</a>	Upload Signed Copy of Program Addendum	2017_POA_Agreement_Signed.pdf <a href="#">Delete</a>	

1 - 2 of 2 items

Save Submit Application 5

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 automatically selected. You can uncheck any cities and zip codes that you do not serve.
4. Upload mandatory **Documents** such as:
  - o Program Addendum
  - o Financial References
5. Click on **Submit Application**.





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

ACTIVE PROGRAMS 2		PROGRAM APPLICATIONS 0		ELIGIBLE PROGRAMS 4	
<u>2017 LIW Reserve Program Optio...</u>			<u>2017 HEE Multi Family Program ...</u>		
<b>Program Budget</b>			<b>Program Budget</b>		
Total	\$4,061,210.00	Total	\$4,504,110.00		
Allocated	\$230,000.00	Allocated	\$95,000.00		
Remaining	\$3,831,210.00	Remaining	\$4,409,110.00		
<b>My Budget</b>			<b>My Budget</b>		
Total :	\$0.00	Total :	\$0.00		
Incentive Paid :	\$0.00	Incentive Paid :	\$0.00		
Reserved / Blocked :	\$0.00	Reserved / Blocked :	\$0.00		
Remaining	\$0.00	Remaining	\$0.00		

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.

ACTIVE PROGRAMS 4		PROGRAM APPLICATIONS 2		ELIGIBLE PROGRAMS 2	
<u>2017 HEE Reserve Program Optio...</u>			<u>2017 HEE Multi Family Program ...</u>		
Status : Submitted			Status : Rejected		
Application Start Date	02/01/2017	Application Start Date	02/01/2017		
Application End Date	04/24/2017	Application End Date	09/29/2017		
Submission Start Date	02/15/2017	Submission Start Date	03/01/2017		
Submission End Date	04/24/2017	Submission End Date	09/29/2017		



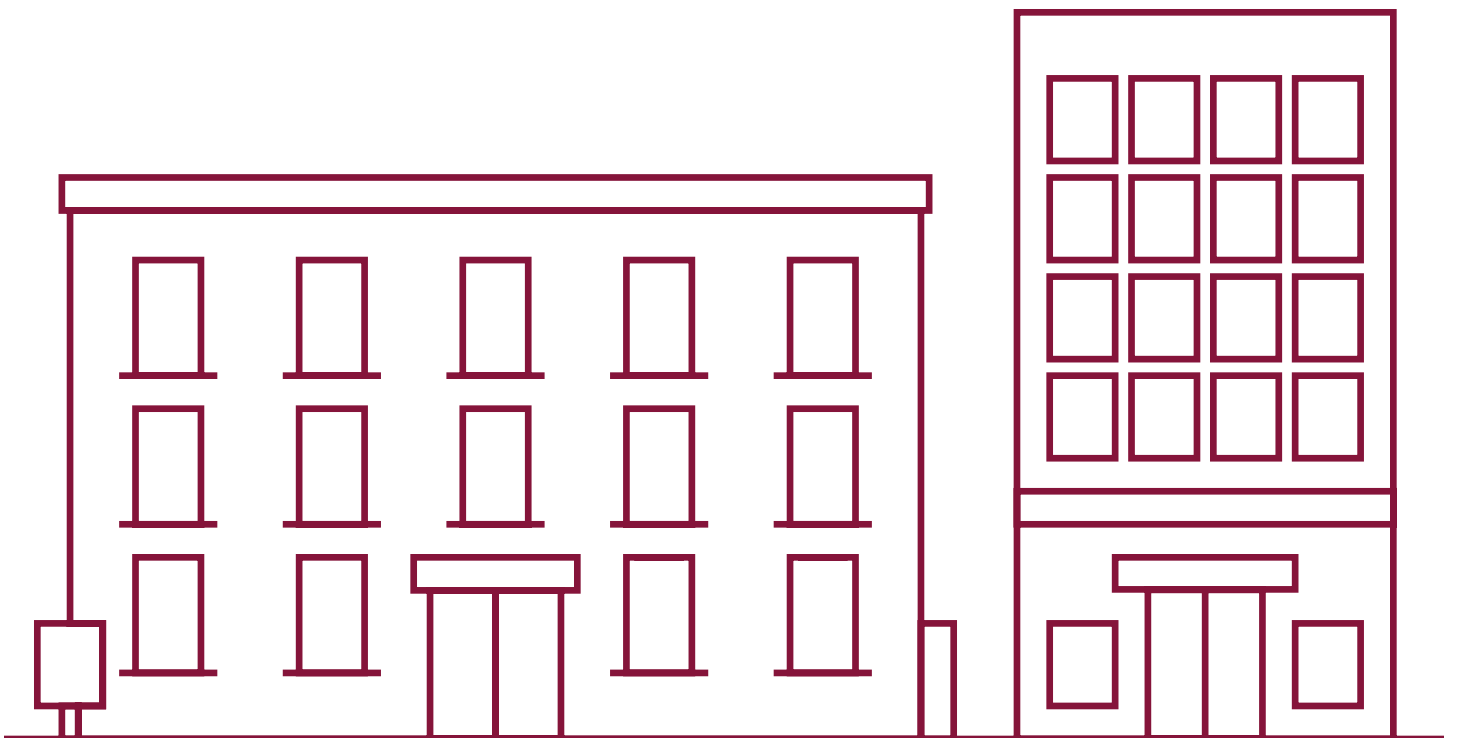
Applications can also be viewed from the **My Applications** tab, which displays a list of each program application and its corresponding status, as shown below.

Application Number	Program option	Program year	Status	Approval Date
POA_17BCSOP - 2017 - 12766	2017 Basic Commercial Standard Offer Program	2017	Approved	05/12/2017
POA_17LIWMF - 2017 - 12755	2017 LIW Multi Family Program Option	2017	Approved	05/12/2017
POA_17HEER - 2017 - 12757	2017 HEE Reserve Program Option	2017	Approved	05/06/2017
POA_17LIWR - 2017 - 12756	2017 LIW Reserve Program Option	2017	Approved	05/06/2017
POA_17SSPVCO - 2017 - 12753	2017 Commercial Solar Program Option	2017	Approved	05/05/2017
POA_17SPVRES - 2017 - 11719	2017 Residential Solar Program Option	2017	Approved	05/05/2017
POA_17CCSOP - 2017 - 12758	2017 Custom Commercial Standard Offer Program	2017	Rejected	-
POA_17HEEMF - 2017 - 12765	2017 HEE Multi Family Program Option	2017	Open	-



# Starting a New Multifamily Project

MULTIFAMILY

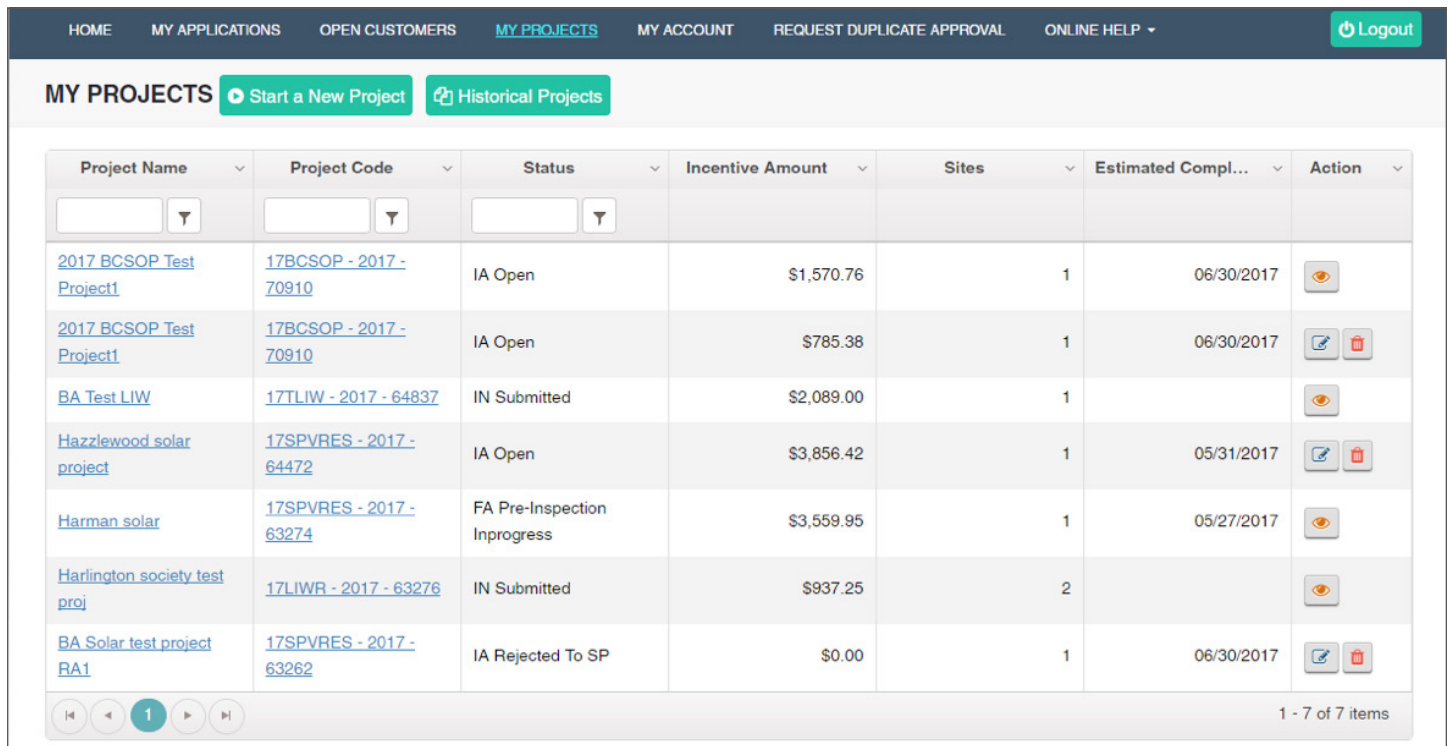


## STARTING A NEW MULTIFAMILY PROJECT

### My Projects

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

- Go to the service provider 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. Navigating to projects by clicking the program name will display only the projects associated with that program.






The screenshot shows the 'MY PROJECTS' dashboard. At the top, there is a navigation bar with links: HOME, MY APPLICATIONS, OPEN CUSTOMERS, MY PROJECTS (highlighted), MY ACCOUNT, REQUEST DUPLICATE APPROVAL, and ONLINE HELP. A 'Logout' button is in the top right. Below the navigation bar, there are two buttons: 'Start a New Project' and 'Historical Projects'. The main content is a table with the following columns: Project Name, Project Code, Status, Incentive Amount, Sites, Estimated Compl..., and Action. The table contains 7 rows of project data. At the bottom of the table, there are navigation icons and a page indicator '1 - 7 of 7 items'.

Project Name	Project Code	Status	Incentive Amount	Sites	Estimated Compl...	Action
<a href="#">2017 BCSOP Test Project1</a>	<a href="#">17BCSOP - 2017 - 70910</a>	IA Open	\$1,570.76	1	06/30/2017	
<a href="#">2017 BCSOP Test Project1</a>	<a href="#">17BCSOP - 2017 - 70910</a>	IA Open	\$785.38	1	06/30/2017	
<a href="#">BA Test LIW</a>	<a href="#">17TLIW - 2017 - 64837</a>	IN Submitted	\$2,089.00	1		
<a href="#">Hazzlewood solar project</a>	<a href="#">17SPVRES - 2017 - 64472</a>	IA Open	\$3,856.42	1	05/31/2017	
<a href="#">Harman solar</a>	<a href="#">17SPVRES - 2017 - 63274</a>	FA Pre-Inspection Inprogress	\$3,559.95	1	05/27/2017	
<a href="#">Harlington society test proj</a>	<a href="#">17LIWR - 2017 - 63276</a>	IN Submitted	\$937.25	2		
<a href="#">BA Solar test project RA1</a>	<a href="#">17SPVRES - 2017 - 63262</a>	IA Rejected To SP	\$0.00	1	06/30/2017	

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.

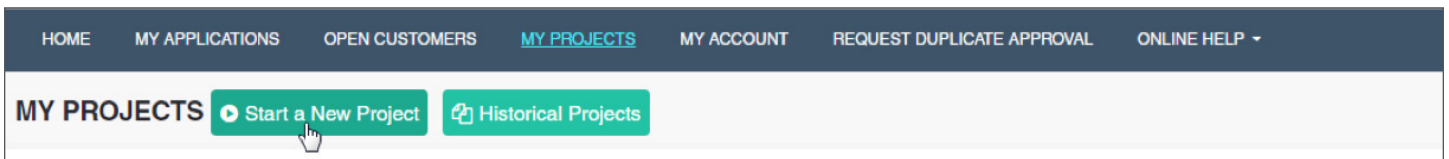


## Action Buttons

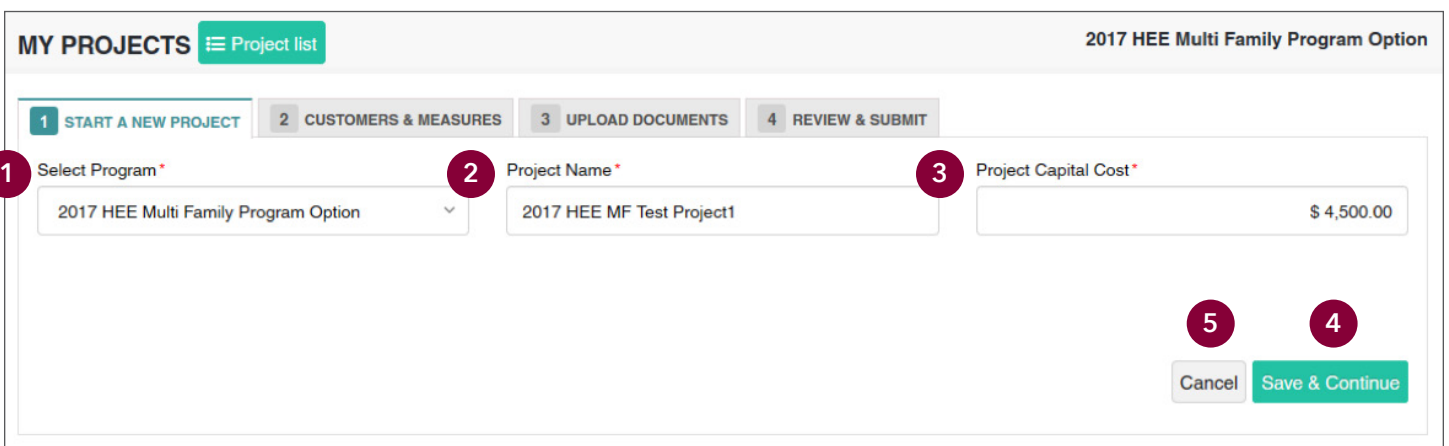
	<b>View:</b> To view a project you've submitted, start with the <b>My Projects</b> table. Use the filter options available in the column headers to refine your search. Then, click the "eye" icon in the <b>Action</b> column. The row color will change to dark gray.
	<b>Edit:</b> To edit your open projects,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

## Start a New Project

- From the main menu bar, click on **My Projects**.
- Click on the **Start a New Project** button below the main menu bar.



- The system will navigate to the **Start a New Project** screen as shown below.

A screenshot of the 'Start a New Project' form. The form is titled 'MY PROJECTS' and 'Project list'. It has a progress bar with four steps: 1. START A NEW PROJECT (active), 2. CUSTOMERS & MEASURES, 3. UPLOAD DOCUMENTS, and 4. REVIEW & SUBMIT. The form has three main input fields: 'Select Program \*' with a dropdown menu showing '2017 HEE Multi Family Program Option', 'Project Name \*' with a text box containing '2017 HEE MF Test Project1', and 'Project Capital Cost \*' with a text box containing '\$ 4,500.00'. At the bottom right, there are two buttons: 'Cancel' and 'Save & Continue'. Red circles with numbers 1 through 5 are overlaid on the form to indicate the steps: 1 on the dropdown, 2 on the Project Name field, 3 on the Project Capital Cost field, 4 on the Save & Continue button, and 5 on the Cancel button.

1. Select the program option from the **Select Program** drop-down menu.
2. Enter the **Project Name**.
3. Enter the **Project Capital Cost**.
4. Click on **Save & Continue** to save the project. The system will navigate to the next tab.
5. 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.

MY PROJECTS Project list 2017 HEE Multi Family Program Option

1 START A NEW PROJECT 2 CUSTOMERS & MEASURES 3 UPLOAD DOCUMENTS 4 REVIEW & SUBMIT

2017 HEE MF Test Pro...	17HEEMF - 2017 - 600...	IA Open	<b>Add Site</b>
Project Name	Project Code	Status	

NO RECORDS FOUND.

The **Add Sites** page requires the last seven-digits of a ESI ID to verify the customer data. Input the last seven-digits of your ESI ID or your full nine-digit meter number and include LG after (xxxxxxxLG), then click **Get Info**.

1 START A NEW PROJECT 2 CUSTOMERS & MEASURES 3 UPLOAD DOCUMENTS 4 REVIEW & SUBMIT

2017 HEE MF Test Pro...	17HEEMF - 2017 - 600...	IA Open	<a href="#">Back To Manage Sites</a>
Project Name	Project Code	Status	

ESI ID\*  Meter Number

(Or)

**Get Info** Clear

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 below.



**ONCOR** Energy Efficiency Contractor Portal

(866) 258-1874 Help Desk | support@oncoreepm.com Support e-mail

Welcome, Charles Pierce (Admin) | Monday, October 09, 2017 10:53:10 AM

HOME MY APPLICATIONS MY PROJECTS MY ACCOUNT REQUEST DUPLICATE APPROVAL ONLINE HELP - Logout

**MY PROJECTS** Project list 2017 Basic Commercial Standard Offer Program

1 START A NEW PROJECT 2 CUSTOMERS & MEASURES 3 UPLOAD DOCUMENTS 4 REVIEW & SUBMIT

2018 Basic commercia... 17BCSOP - 2017 - 599... IA Open  
Project Name Project Code Status [Back To Manage Sites](#)

ESI ID\* Meter Number  
7479727 (Or) 120450872LG [Get Info](#) [Clear](#)

**1 Customer Address and Contact Information**

Customer Name\* James Riddwick Group Type\* Small Commercial

Street 14355 MORRIS DIDO NEWARK RD POD City FORT WORTH County TARRANT

State TX Zip Code 76179

Alternate Address

**2 Service Provider Project Contact Information**

Project Contact Name\* Charles Pierce Work Phone No\* (111) 111-1111 E-mail user1@mail.com

**Service Provider Inspection Contact Information**

Select an existing Template to fill contact information Contact Name\* Johnny English Work Phone No\* (111) 111-1111

E-mail johnny@mail.com Mobile (111) 111-1111

**Customer Inspection Contact Information**

Contact Name\* James Riddwick Work Phone No\* (111) 111-1111 E-mail james@mail.com

Mobile (111) 111-1111

**Customer Signature Contact Information**

Same as Inspection Contact Information Contact Name James Riddwick E-mail james@mail.com

I verify that this is the correct site address which should be provided to Oncor's inspectors for this project.  
**Note:** If the address is discovered to be incorrect by an inspector attempting to conduct an inspection, you may be charged for a repeat inspection.

Save as template  
Template Name Crew1 [\(Verify the customer site address to get the Save button enabled\)](#) [Save](#)

2017 Oncor Electric Delivery Company LLC. Privacy | Legal | Contact

1. Enter the **Customer Name**, **Floor Plan Name**, **Building Type** and **Square Ft**.
2. Enter **Property Manager Contact Information**.
3. Click on the "verify" check box at the bottom of the page to confirm you've entered the correct site address. 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.)
4. Click the **Save** button. The added site will be shown in the grid.



## How to Add Multiple Sites

Navigate back to the **Customers & Measures** tab where you have an option to add another site to a project by clicking on the **Add Site** button in the right corner of the project information header.

## Add Measures

- Click on the **Add Measure** button at the top of the screen and select the appropriate measure from the drop-down menu.
- Once the measure is selected, the system will request measure inputs. Fill in all of the required fields.

The screenshot shows the 'CUSTOMERS & MEASURES' tab. At the top, there are four steps: 1. START A NEW PROJECT, 2. CUSTOMERS & MEASURES (active), 3. UPLOAD DOCUMENTS, and 4. REVIEW & SUBMIT. Below this, project information is displayed: Project Name '2017 HEE MF Test Pro...', Project Code '17HEEMF - 2017 - 600...', and Status 'IA Open'. An 'Add Site' button is in the top right. A table lists customer sites with columns: ESID, Customer Site, kW Savings, kWh Savings, Incentive Amount, and Action. The first row is for 'Willia Shakespeare' with values 4331512, 0.0000, 0.0, and \$0.00. The 'Add Measure' button in the Action column is highlighted with a red box. Below the table, a section for 'Measures Name' is empty, showing 'No Records to Display'. At the bottom, there are navigation arrows and a '1 - 1 of 1 items' indicator.

The screenshot shows the 'Add Measure' form for 'Air Infiltration'. The top navigation is the same as the previous screenshot. Project information is: Project Name '2017 HEE MF Test Pro...', Project Code '17HEEMF - 2017 - 599...', and Status 'IA Open'. A 'Back To Manage Sites' link is on the right. The form has several input fields: 'Climate Zone' (2), 'Stories' (Two Stories), 'Shielding Type' (Normal), 'No. of Bedrooms' (4), 'No. of Occupants' (5), 'Area Treated (Sq. Ft.)' (2457), 'Before Improvements' (4500), 'After Improvements' (2367), 'Air Flow Reduction' (0.53), 'Min Final CFM' (1645.91), 'Heating/Cooling Type' (Select), and 'Air Flow Reduction Percentage' (47.4). There is a file upload section for 'Upload Documentation for 30% or Higher Reduction' with a 'Choose file' button and a filename '99988673126.pdf'. Below this is a section for 'Infiltration Measures Installed (Check all that apply)' with a dropdown arrow. It contains several checkboxes: 'Attic Access' (checked), 'Door Threshold' (checked), 'Light Switch Outlet Gaskets' (checked), 'Window Caulking' (unchecked), 'Door Sweeps' (unchecked), 'Caulk Base Boards' (unchecked), 'Door Weather-Stripping' (checked), 'Exhaust Fan/Light Penetration' (checked), 'Window Weather-Stripping' (unchecked), 'Caulk Ceiling Trim' (unchecked), 'Furnace Closet' (unchecked), 'Sealed Plumbing Penetrations' (unchecked), and 'Other' (unchecked). At the bottom, there is a 'Notes (Max. 1000 Characters allowed):' section with a text area and a 'Save' button.





- Click on the **Save** button. The system will display a “success” message when the measure has been stored successfully, along with the calculated kW & kWh savings and incentive amount.
- The added measure(s) will be displayed in a grid format as shown below.
- Click **Save & Continue** at the bottom of the Customers & Measures tab.
- The system will advance to the **Upload Documents** page.

1 START A NEW PROJECT   2 CUSTOMERS & MEASURES   3 UPLOAD DOCUMENTS   4 REVIEW & SUBMIT

2017 HEE MF Test Pro...   17HEEMF - 2017 - 600...   IA Open  
Project Name   Project Code   Status   [Add Site](#)

ESIID	Customer Site ...	kW Savings	kWh Savings	Incentive Amount	Action												
4331512	Willia Shakepeare	0.7380	1,350.0	\$201.99	<a href="#">Add Measure</a>												
<table border="1"> <thead> <tr> <th>Measures Name</th> <th>Duplicate Status</th> <th>kW</th> <th>kWh</th> <th>Incentive</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Ceiling Insulation</td> <td>Duplicate(s) Found</td> <td>0.7380</td> <td>1,350.0</td> <td>\$201.99</td> <td> </td> </tr> </tbody> </table>						Measures Name	Duplicate Status	kW	kWh	Incentive	Action	Ceiling Insulation	Duplicate(s) Found	0.7380	1,350.0	\$201.99	
Measures Name	Duplicate Status	kW	kWh	Incentive	Action												
Ceiling Insulation	Duplicate(s) Found	0.7380	1,350.0	\$201.99													
4331513	Nikola Tesla	0.7380	1,350.0	\$201.99	<a href="#">Add Measure</a>												
<table border="1"> <thead> <tr> <th>Measures Name</th> <th>Duplicate Status</th> <th>kW</th> <th>kWh</th> <th>Incentive</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Ceiling Insulation</td> <td>Duplicate(s) Found</td> <td>0.7380</td> <td>1,350.0</td> <td>\$201.99</td> <td> </td> </tr> </tbody> </table>						Measures Name	Duplicate Status	kW	kWh	Incentive	Action	Ceiling Insulation	Duplicate(s) Found	0.7380	1,350.0	\$201.99	
Measures Name	Duplicate Status	kW	kWh	Incentive	Action												
Ceiling Insulation	Duplicate(s) Found	0.7380	1,350.0	\$201.99													
		1,476.0	2,700.0	\$403.98													

1 - 2 of 2 items

[Prev](#)   [Cancel](#)   [Save & Continue](#)

### Edit Site & Measure

- To edit the site/measure information, click on the **Edit** button in the grid.
- To delete a site/measure, click on the “trash can” icon.
- Click on the “image” icon to add/view site/measure 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 - Open	Host customer agreement Tenant income eligibility	Yes	Yes	
IA - Pre-Inspection Completed	Multifamily addendum		Yes	Yes
IN - Open	Production summary report		Yes	

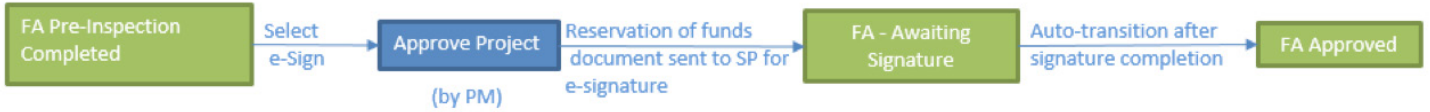
Service providers can use the e-signature feature to get the documents signed. Before sending the documents to recipients for their e-signature, service providers must complete all project data and ensure customer email IDs are provided in the "signatory information" section of the customer site form.

### How to send documents for e-signatures

1. Select the "e-sign" signature option to digitally sign the system-generated document.
2. Upload all of the required project support documents other than system-generated documents.
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 ID 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.
7. When the "e-sign" signature option is selected, the system will not allow the user to manually upload documents against the system-generated documents.
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 Right Signature.



Work flow operations for e-signature:



PM - Oncor Program Manager  
 SP - Service Provider

**MY PROJECTS** Project list 2017 HEE Multi Family Program Option

1 START A NEW PROJECT   2 CUSTOMERS & MEASURES   **3 UPLOAD DOCUMENTS**   4 REVIEW & SUBMIT

2017 HEE Multifamily...   17HEEMF - 2017 - 599...   IA Open  
 Project Name   Project Code   Status

Select the signature option    Wet Sign    e-Sign

Document Name	Description	SP Attachments	PM Attachments	Action
<a href="#">Host Customer Agreement*</a>	Upload Host Customer Agreement			

1 - 2 of 2 items

Prev Cancel Save & Continue

Signature option selection





2017 HEE Multi Family Program Option Project list

EDIT PROJECT CUSTOMERS & MEASURES **UPLOAD DOCUMENTS** COMMENTS REVIEW & SUBMIT

2017 HEE Multifamily... 17HEEMF - 2017 - 599... IA Awaiting ▾  
Project Name Project Code Status

Select the signature option  Wet Sign  e-Sign

Document Name	Description	SP Attachments	PM Attachments	Action
<a href="#">Host Customer Agreement*</a>	Upload Host Customer Agreement	2017_Host_Customer_Agree		

1 - 2 of 2 items

Prev

Next

*Document sent for signature*

Service providers can also complete a wet sign by manually downloading the document. Click the hyperlink and upload the signed document under the **SP Attachments** section.

(★) symbol denotes mandatory documents.



## Review and Submit

The **Review & Submit** page allows service providers to review all of 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.

The screenshot displays the 'Review & Submit' interface. At the top, there are four tabs: '1 START A NEW PROJECT', '2 CUSTOMERS & MEASURES', '3 UPLOAD DOCUMENTS', and '4 REVIEW & SUBMIT'. Below the tabs, project details are shown: '2017 HEE MF Test Pro...' (Project Name), '17HEEMF - 2017 - 600...' (Project Code), 'IA Open' (Status), and 'Est Completion Date' and 'Project Type' (both '-').

The 'Customers & Measures' section contains a table with the following data:

ESIID	Customer Site Name	kW Savings	kWh Savings	Incentive Amount
4331512	Willia Shakepeare	0.7380	1,350.0	\$201.99
4331513	Nikola Tesla	0.7380	1,350.0	\$201.99
		1.4760	2,700.0	\$ 403.98

Below the table is a 'Review Documents' section with a list of documents: 'Host Customer Agreement', 'Upload Signed Host Customer Agreement', and 'Attachments'. Under 'Attachments', a file named '2017\_POA\_Agreement\_Signed.pdf' is listed.

At the bottom, there is a note: 'Note : Please verify the documents before submitting to avoid project rejection by Oncor. If you have modified the project data after uploading the documents, kindly ensure to download the revised document again and reload it with signature.' To the right of the note are 'TMDORP' and 'TMDRPI' logos, and a green 'Submit' button.

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

- Initial application phase (IA)
- Installation notice phase (IN)

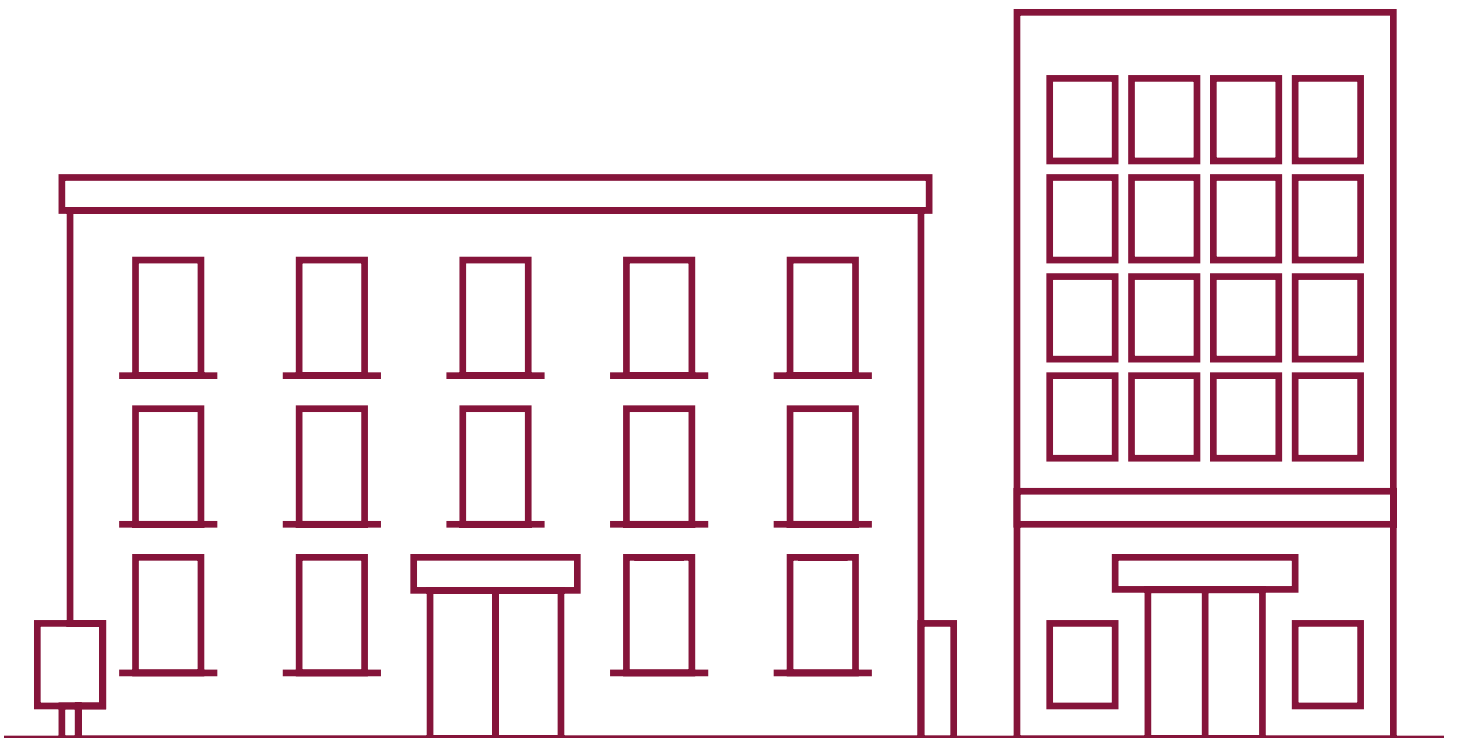
As the project progresses through each stage, users will receive email notifications indicating the status of the project.



# Editing a Project

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MULTIFAMILY



## 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.

Project Name	Project Code	Status	Incentive Amount	Sites	Estimated Completion ...
Hazzlewood solar project	<a href="#">17SPVRES - 2017 - 64472</a>	IA Open	\$3,856.42	1	05/31/2017
WWR	<a href="#">17LIW Edit Project 39922</a>	IN Open	\$0.00	0	

- 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.

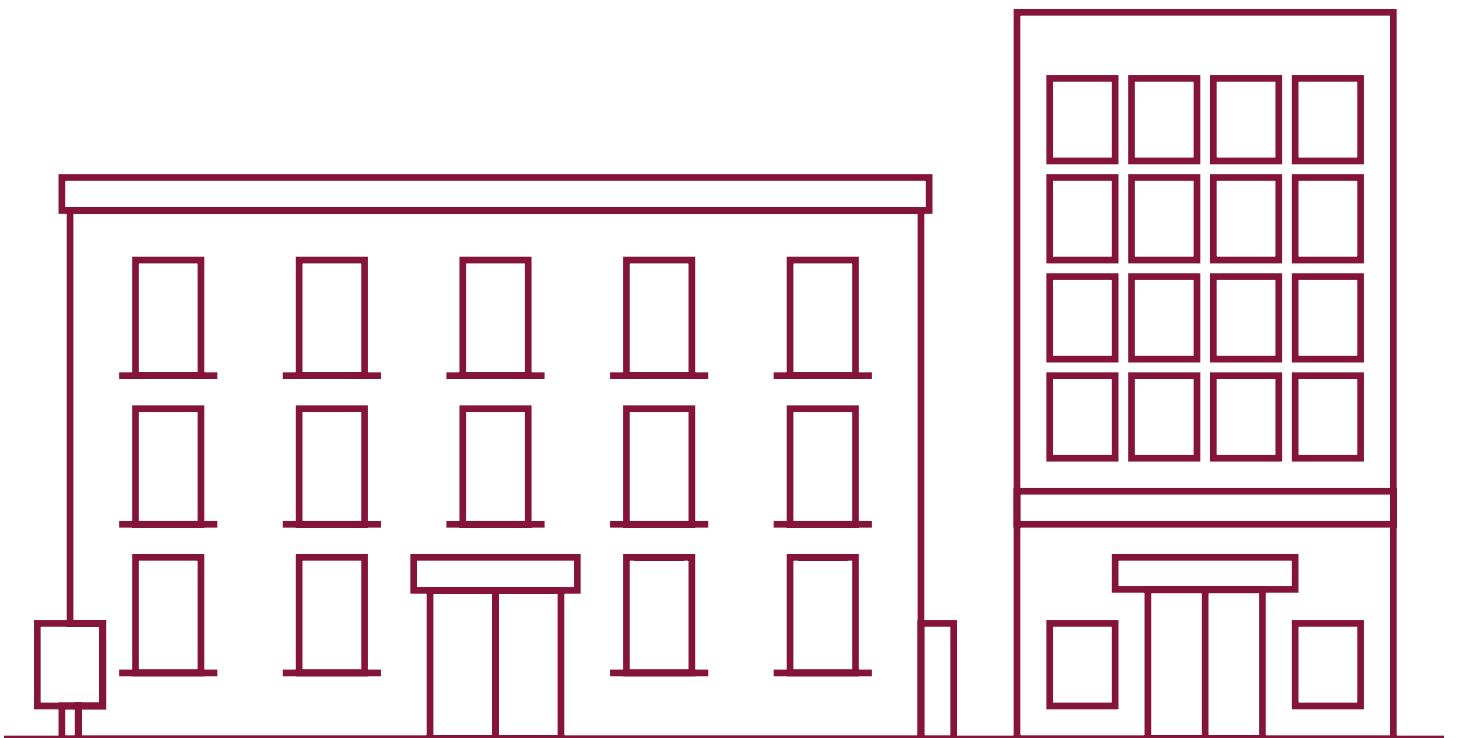
Project Name	Project Code	Status	Incentive Amount	Sites	Estimated Compl...	Action
<a href="#">2017 BCSOP Test Project1</a>	<a href="#">17BCSOP - 2017 - 70910</a>	IA Open	\$1,570.76	1	06/30/2017	
<a href="#">2017 BCSOP Test Project1</a>	<a href="#">17BCSOP - 2017 - 70910</a>	IA Open	\$785.38	1	06/30/2017	
<a href="#">BA Test LIW</a>	<a href="#">17LIW - 2017 - 64837</a>	IN Submitted	\$2,089.00	1		
<a href="#">Hazzlewood solar project</a>	<a href="#">17SPVRES - 2017 - 64472</a>	IA Open	\$3,856.42	1	05/31/2017	
<a href="#">Harman solar</a>	<a href="#">17SPVRES - 2017 - 63274</a>	FA Pre-Inspection Inprogress	\$3,559.95	1	05/27/2017	
<a href="#">Harrington society test proj</a>	<a href="#">17LIWR - 2017 - 63276</a>	IN Submitted	\$937.25	2		
<a href="#">BA Solar test project RA1</a>	<a href="#">17SPVRES - 2017 - 63262</a>	IA Rejected To SP	\$0.00	1	06/30/2017	

- 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.



# Request for Duplicate Approval








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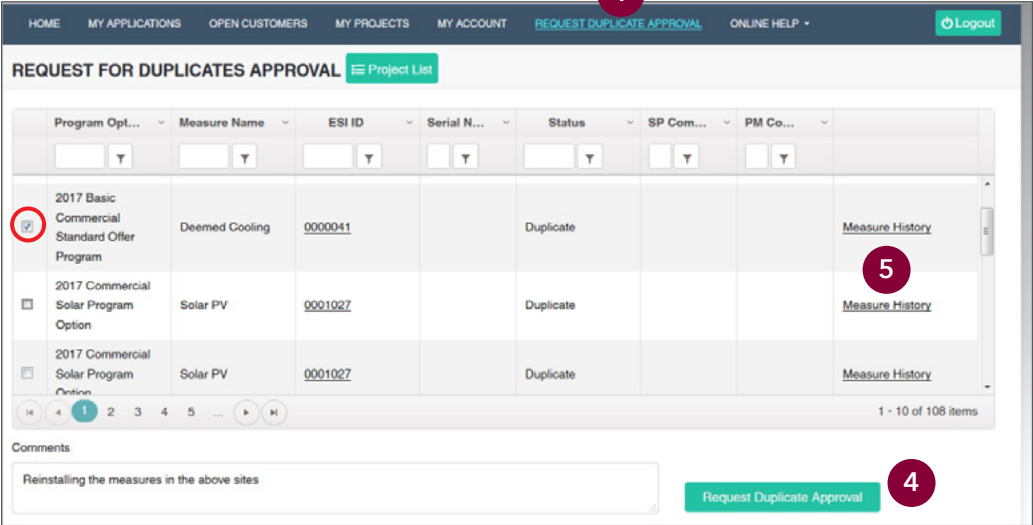
## REQUEST FOR DUPLICATE APPROVAL

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.

ESIID	Customer Site N...	kW Savings	kWh Savings	Incentive Amount	Action
0422567	Tuusey	0.1718	1,404.3	\$98.82	 
Measures Name	Duplicate Status	kW	kWh	Incentive	Action
Water Heater Pipe Insulation	Duplicate(s) found	0.1718	1,404.3	\$98.82	 
0315864	Scot arrey	1.2132	2,219.4	\$838.43	 
Measures Name	Duplicate Status	kW	kWh	Incentive	Action
Ceiling Insulation	No Duplicate Exists	1.2132	2,219.4	\$838.43	 
		1.3850	3,623.7	\$ 937.25	

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.



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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](mailto:support@oncoreepm.com).