Instruction Guide

SOLAR

EEPM 2.0

ENERGY EFFICIENCY PROGRAM

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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 portal eliminates the need for manual savings calculations through spreadsheets and introduces PVWatts API, a service which calculates the savings automatically when users input inverter and PV array details.

The new and improved process will minimize the time it takes to create and submit projects, and reduce data entry errors in savings calculations. 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.

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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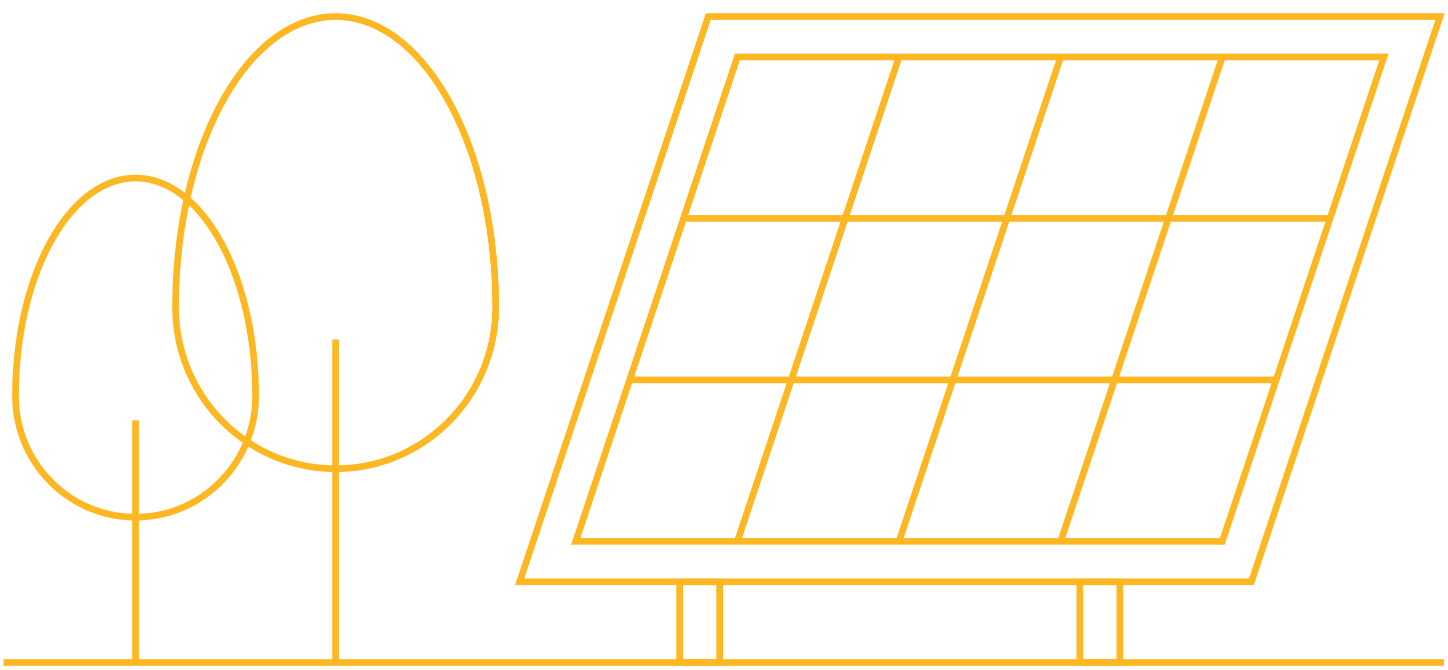
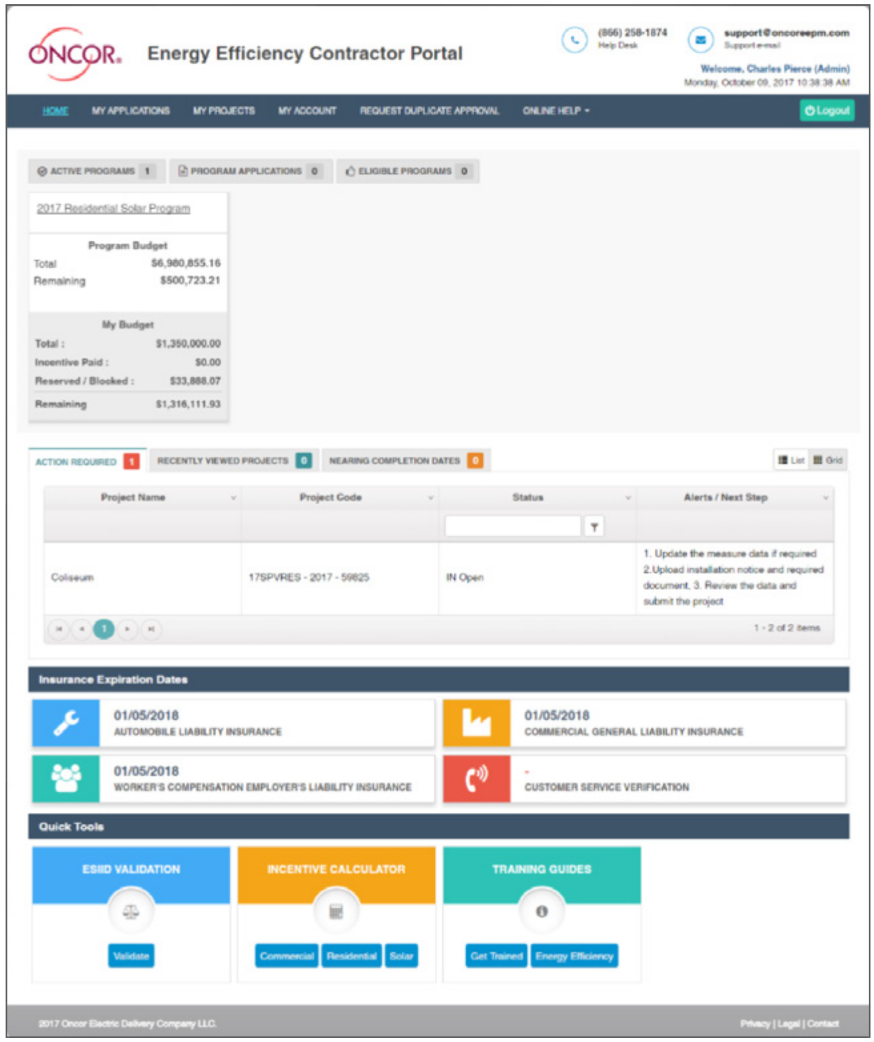


SERVICE PROVIDER DASHBOARD

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

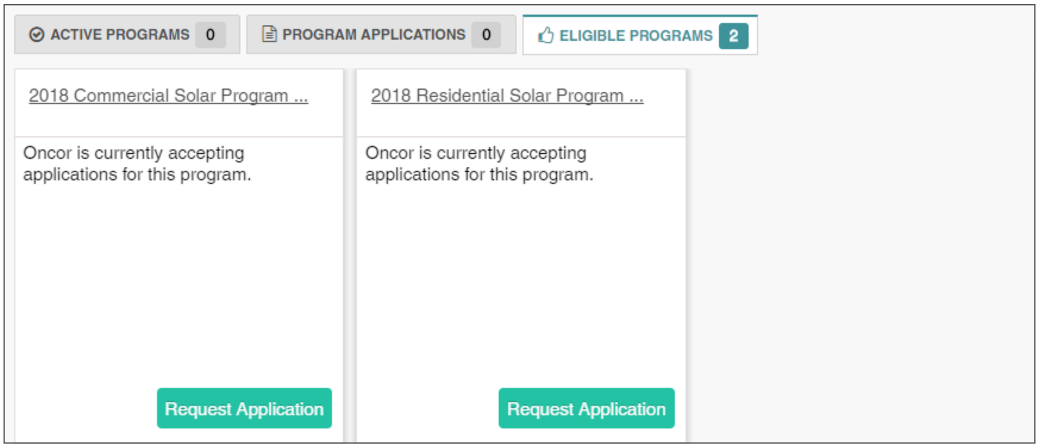
- Program options in various stages
    - Active Programs
    - Program Applications
    - Eligible Programs
- Recent project data based on specific categories
    - Action Required
    - Recently Viewed Projects
    - Projects Nearing Completion Date
- Insurance expiration highlights
- ESI ID validation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



PROGRAM OPTION ACTIVITY

Eligible Programs

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

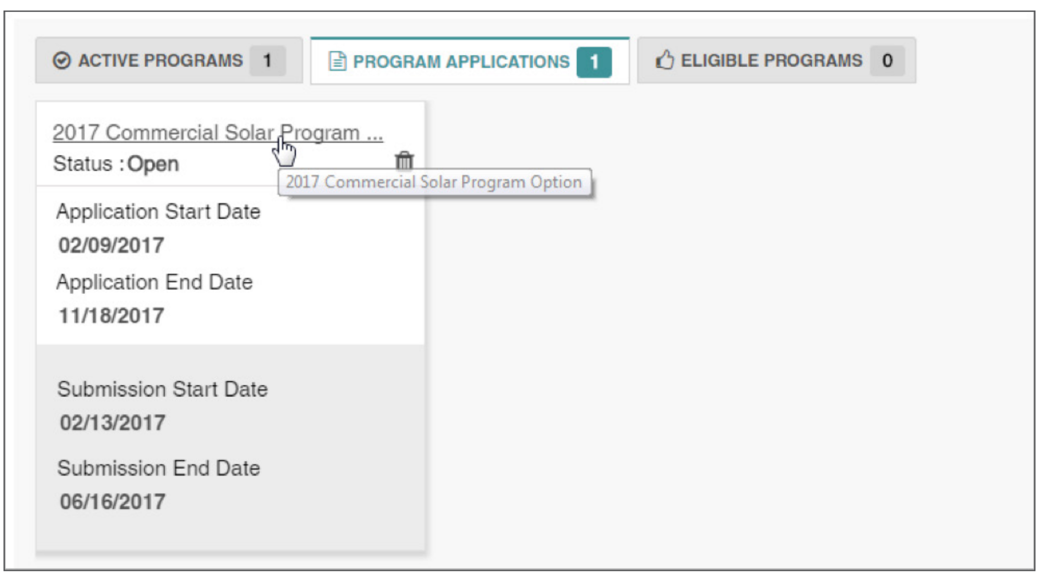


- To view the specific programs, you're eligible for, click on the **Eligible Programs** tab.
    - o The corresponding programs will appear in a horizontal series.
    - o If the program you want to apply for is not displayed, email the support desk/program manager.
- Navigate right or left using the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

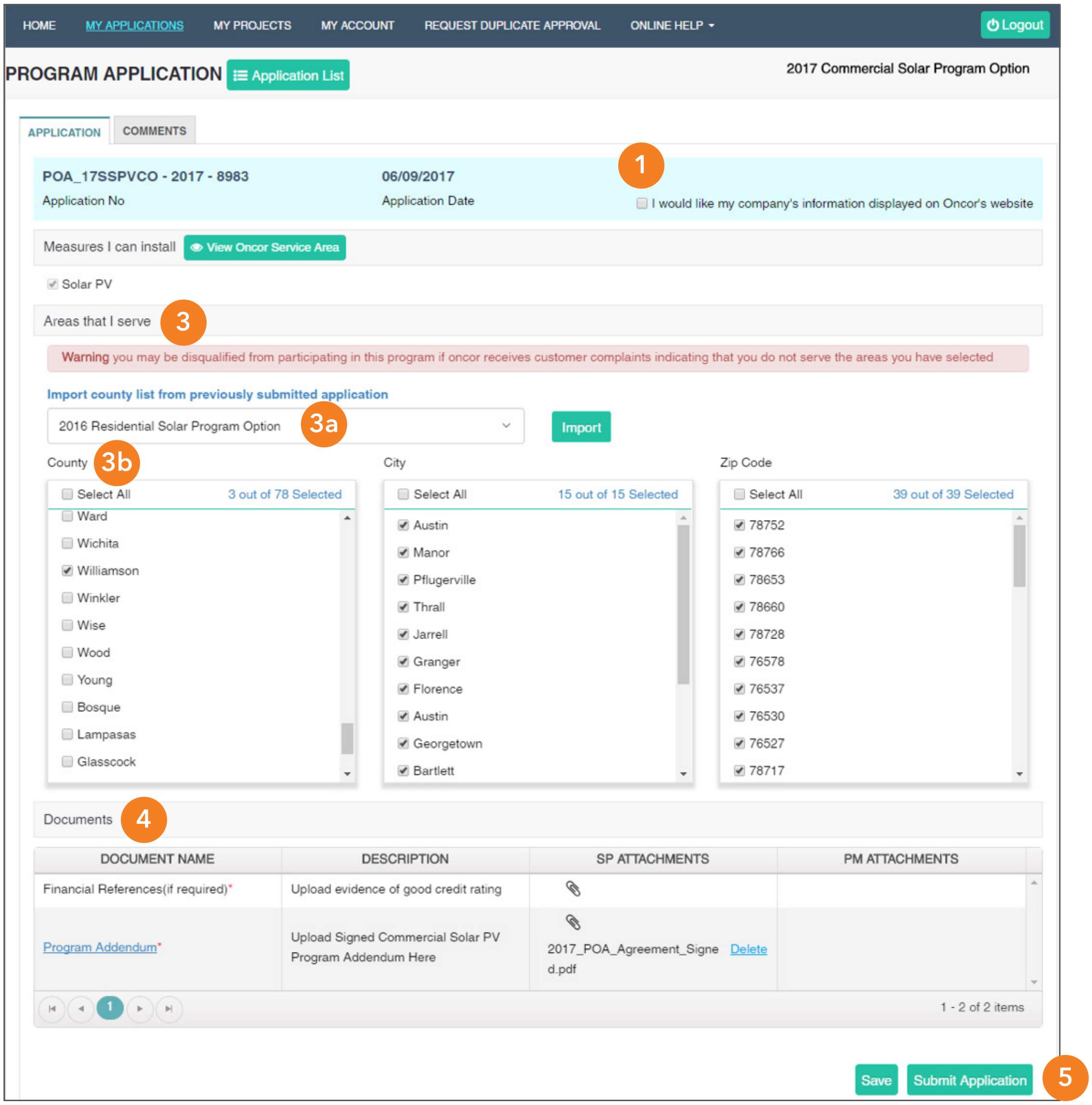
Program Applications

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

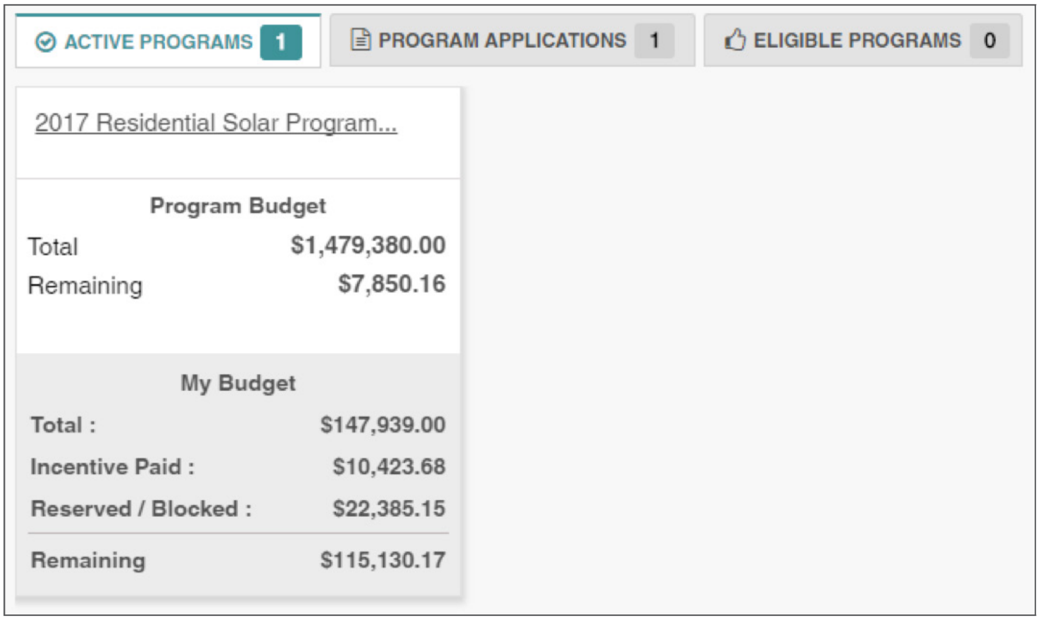


1. Check the box at the top right to have your company's name added to the Oncor/TALOT website for customers.

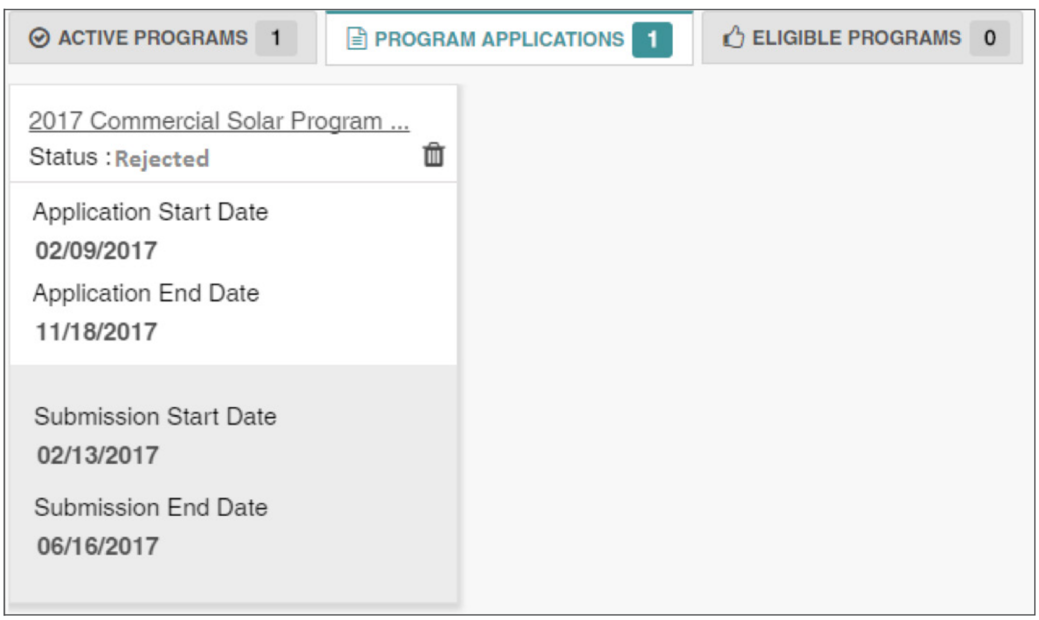
2. Select (check the appropriate boxes) for **Measures I can install**.

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.



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.



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.

Starting a New Solar Project

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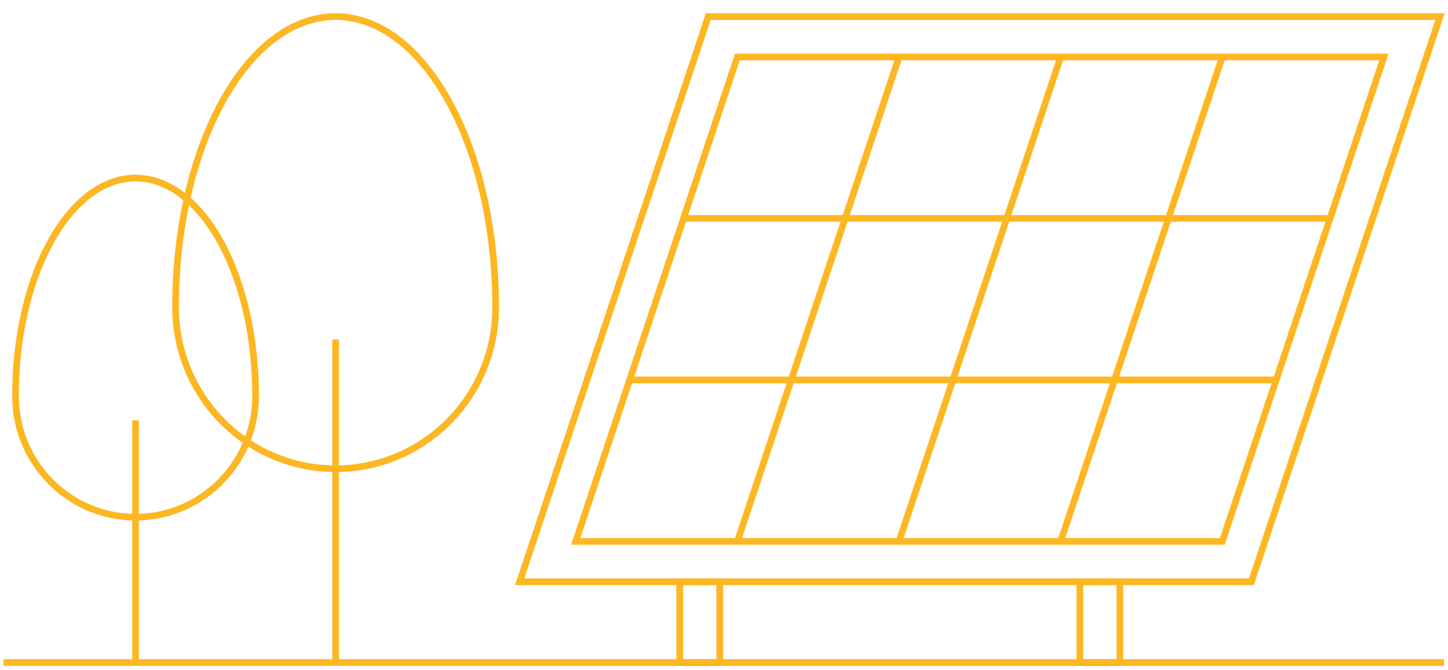
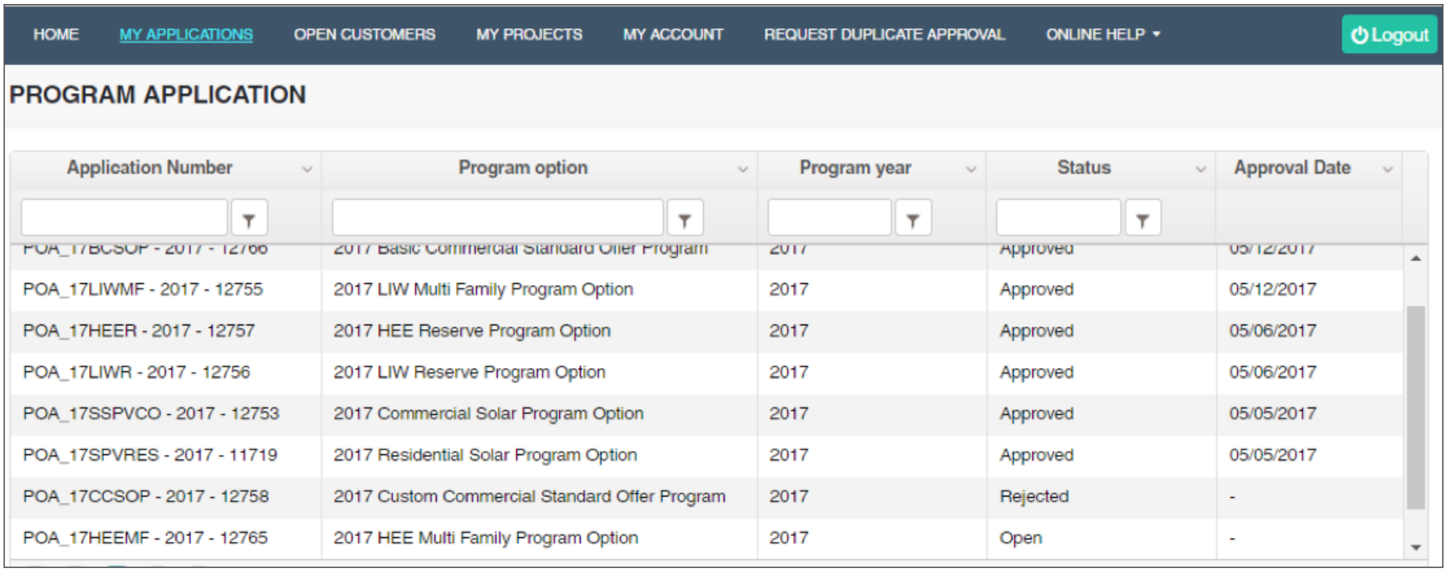


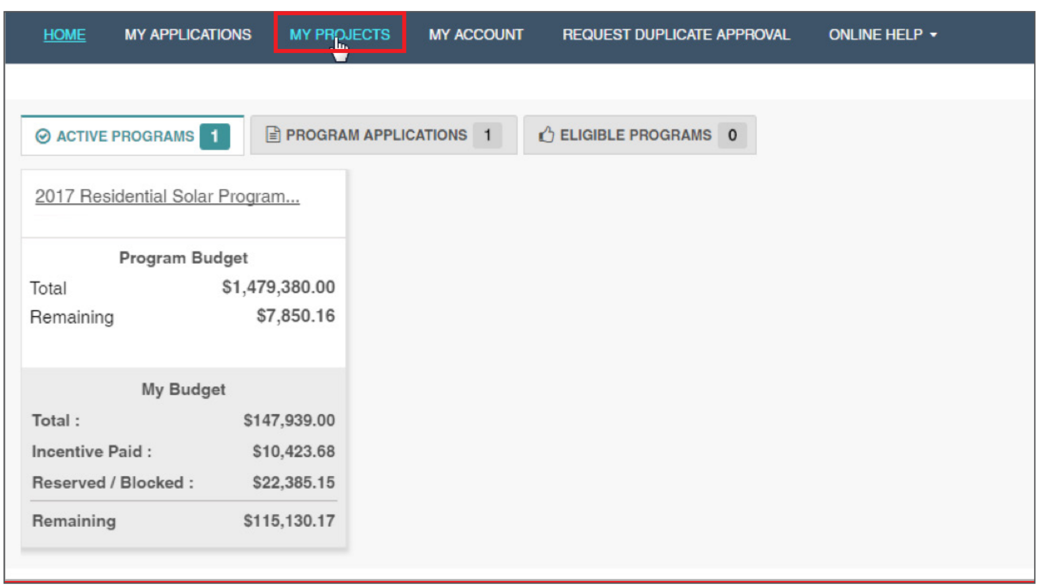


Application Number	Program option	Program year	Status	Approval Date
POA_17LIWMF - 2017 - 12755	2017 LIW Multi Family Program Option	2017	Approved	05/12/2017
POA_17HEER - 2017 - 12757	2017 HEE Reserve Program Option	2017	Approved	05/06/2017
POA_17LIWR - 2017 - 12756	2017 LIW Reserve Program Option	2017	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	-

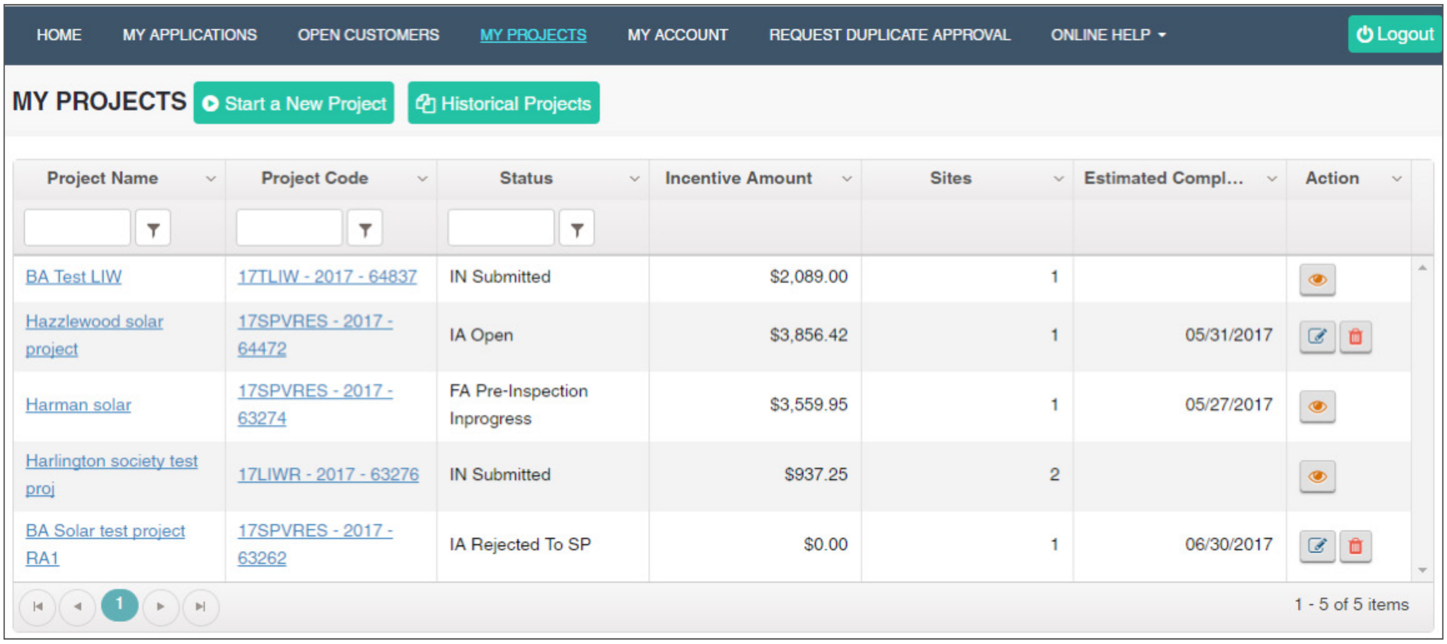
My Projects

EEPM 2.0 simplifies the process of starting a new solar 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 **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.



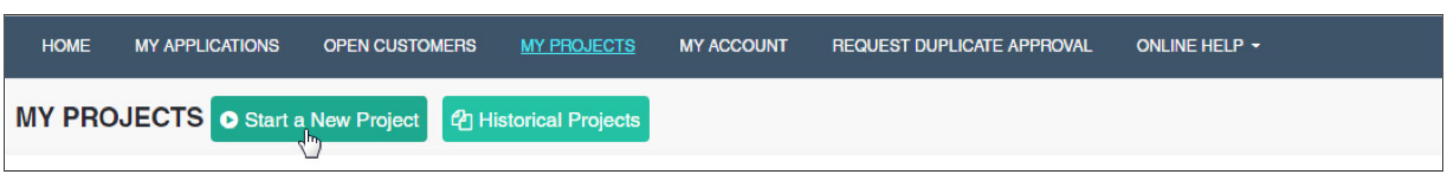
Project Name	Project Code	Status	Incentive Amount	Sites	Estimated Compl...	Action
BA Test LIW	17TLIW - 2017 - 64837	IN Submitted	$2,089.00	1		
Hazzlewood solar project	17SPVRES - 2017 - 64472	IA Open	$3,856.42	1	05/31/2017	
Harman solar	17SPVRES - 2017 - 63274	FA Pre-Inspection Inprogress	$3,559.95	1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

Action Buttons

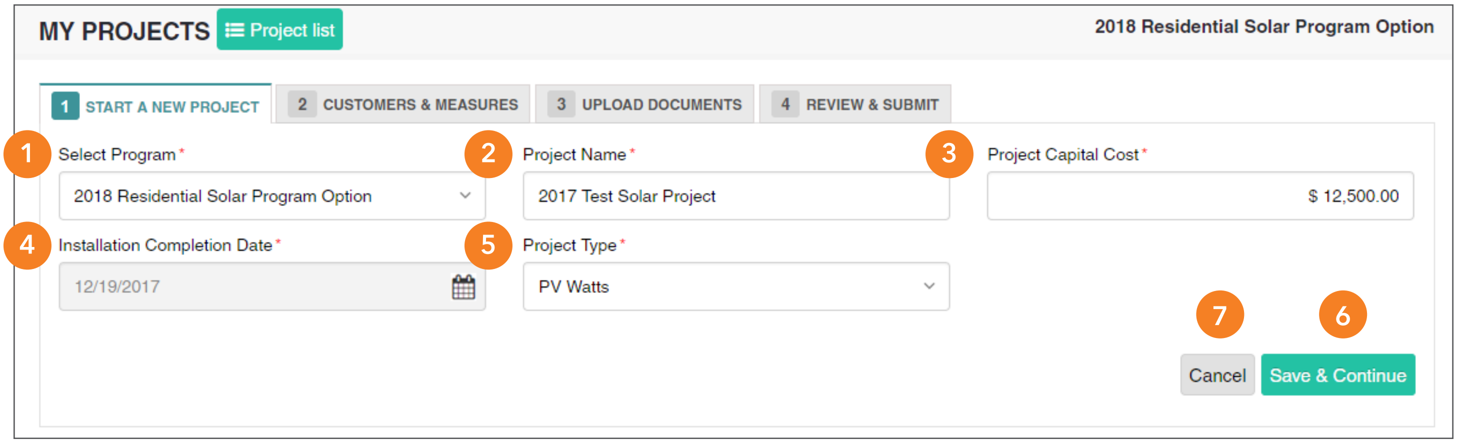
	**View:** To view a project you've submitted, start with the **My Projects** table. Use the filter options available in the column headers to refine your search. Then, click the "eye" icon in the **Action** column. The row color will change to dark gray.
	**Edit:** To edit your open projects, click on 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

- 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.



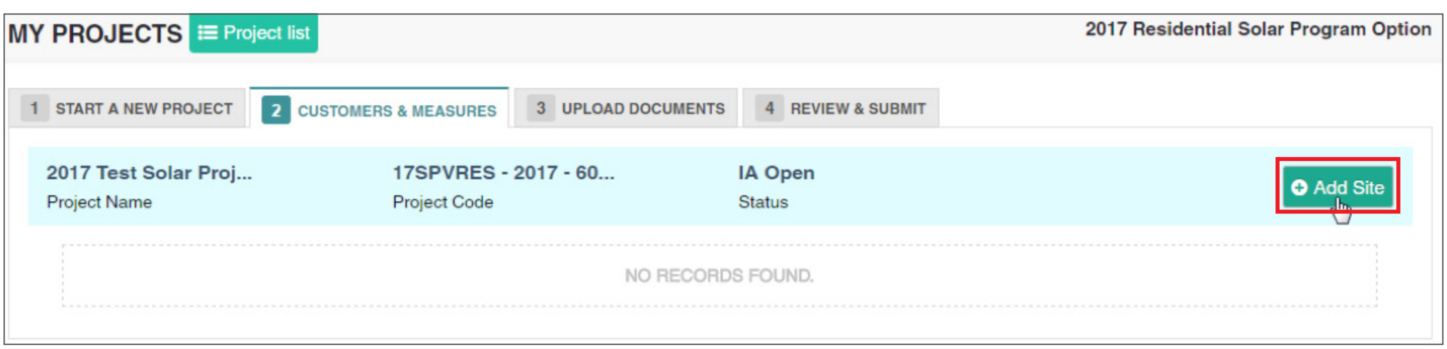
1. Select the program option from the **Select Program** drop-down menu.
2. Enter the **Project Name**.
3. Enter the **Project Capital Cost**.
4. Select **Estimated Completion Date** from the calendar.
5. Choose a project type from the **Project Type** drop-down menu and select **PV Watts**.
6. Click 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.



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 below.

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

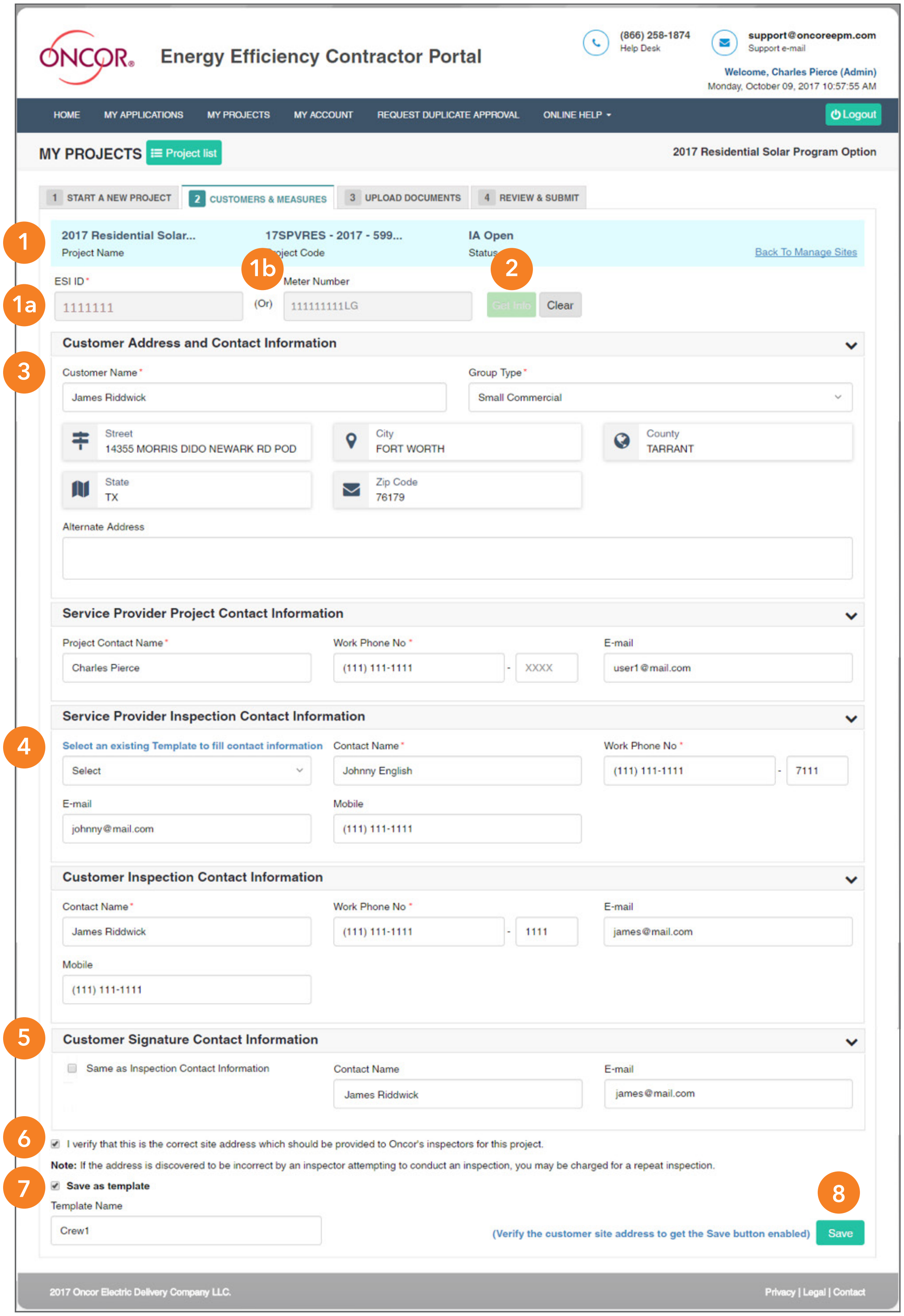
4. Select the existing template to auto-fill the **Service Provider Inspection Contact Information**.

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

6. 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.)

7. To save the new template, check **Save as template** at the bottom of the screen and provide the name for the template.

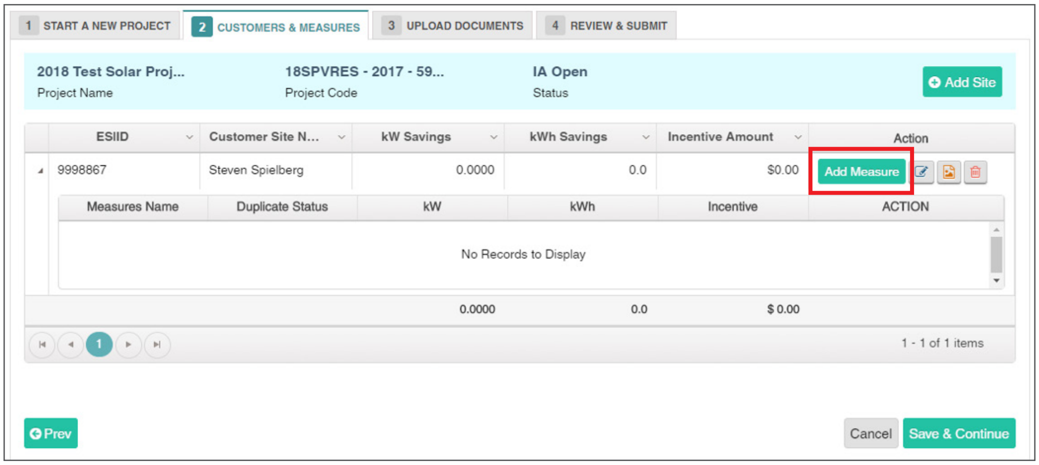
8. Click the **Save** button. The added site will be shown in the grid.


ONCOR
Energy Efficiency Contractor Portal
(866) 258-1874
Help Desk
support@oncoreepm.com
Support e-mail
Welcome, Charles Pierce (Admin)
Monday, October 09, 2017 10:57:55 AM
HOME
MY APPLICATIONS
MY PROJECTS
MY ACCOUNT
REQUEST DUPLICATE APPROVAL
ONLINE HELP
Logout
MY PROJECTS
Project list
2017 Residential Solar Program Option
1 START A NEW PROJECT
2 CUSTOMERS & MEASURES
3 UPLOAD DOCUMENTS
4 REVIEW & SUBMIT
1
2017 Residential Solar...
Project Name
17SPVRES - 2017 - 599...
Project Code
IA Open
Status
Back To Manage Sites
1b
2
ESI ID
1a
1111111
(Or)
Meter Number
111111111LG
Get Info
Clear
Customer Address and Contact Information
3
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
Service Provider Project Contact Information
Project Contact Name
Charles Pierce
Work Phone No
(111) 111-1111
XXXX
E-mail
user1@mail.com
Service Provider Inspection Contact Information
4
Select an existing Template to fill contact information
Select
Contact Name
Johnny English
Work Phone No
(111) 111-1111
7111
E-mail
johnny@mail.com
Mobile
(111) 111-1111
Customer Inspection Contact Information
Contact Name
James Riddwick
Work Phone No
(111) 111-1111
1111
E-mail
james@mail.com
Mobile
(111) 111-1111
5
Customer Signature Contact Information
Same as Inspection Contact Information
Contact Name
James Riddwick
E-mail
james@mail.com
6
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.
7
Save as template
Template Name
Crew1
8
(Verify the customer site address to get the Save button enabled)
Save
2017 Oncor Electric Delivery Company LLC.
Privacy | Legal | Contact

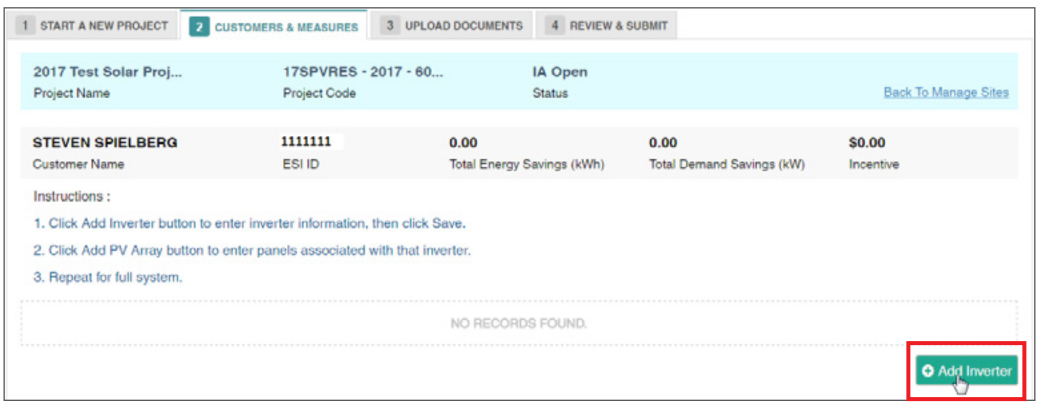
Add Measures

You can now enter inverter and PV array information directly into EEPM 2.0 with no need for a separate Excel file. You can also add an unlimited number of inverters with PV array lists included below each inverter. There may be multiple solar PV arrays below an inverter.

•Click on **Add Measure** to add inverter and solar PV array.



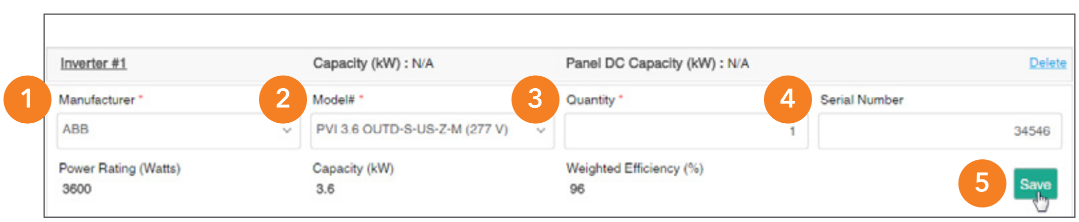
- Click on **Add Inverter**.



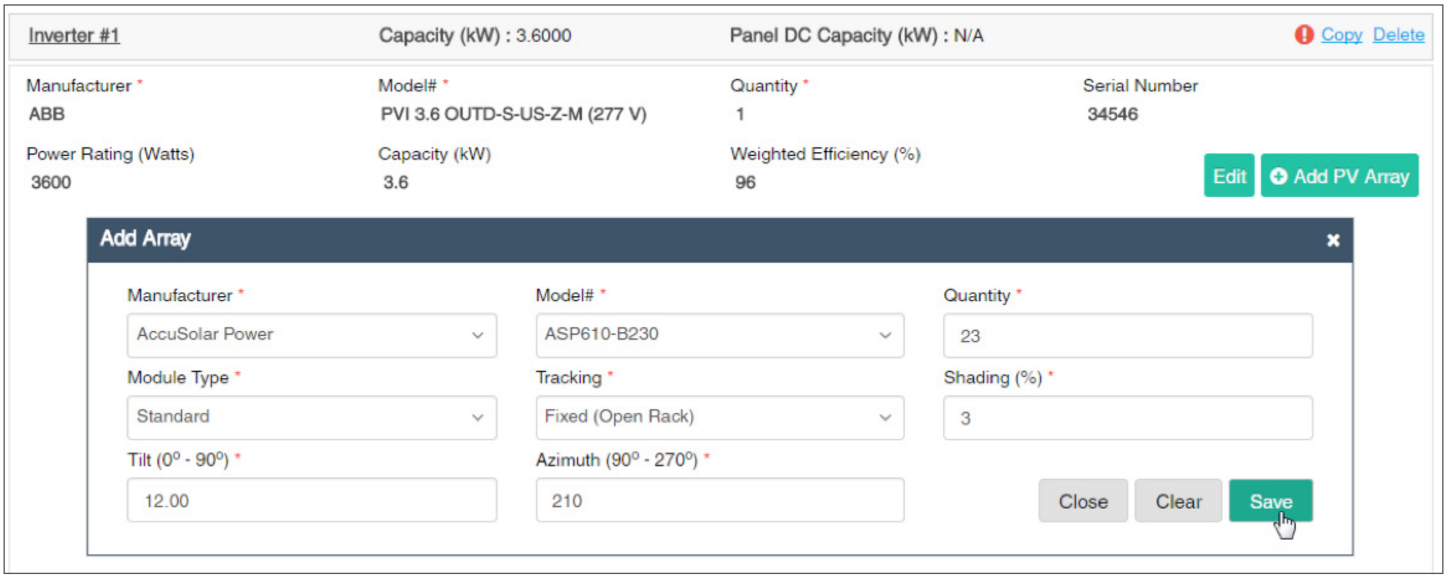
- The system will display an inverter section that will allow you to enter the inverter data.

Enter the following:

1. **Manufacturer**
2. **Model #**
3. **Quantity**
4. **Serial Number** (optional)
5. Click on the **Save** button.

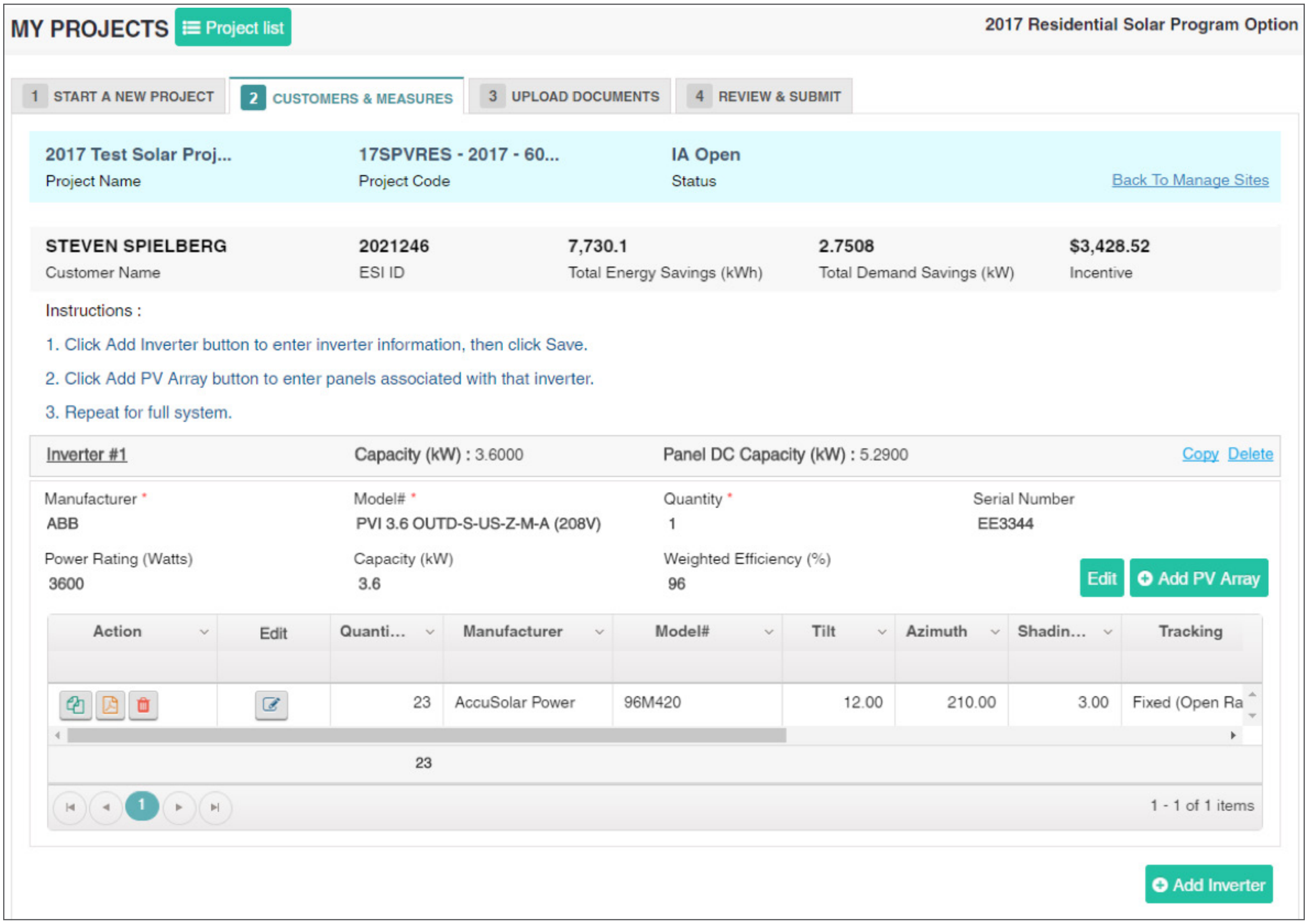


Once the inverter data is saved, the **Add PV Array** button will be visible on the screen.



- Click on **Save** to save the array data.
- Click on **Clear** to clear all the entered array details.
- Click on **Close** or the "x" in the top right corner to close the pop-up window.

To repeat or include additional PV arrays, click on the **Add PV Array** button below the inverter.

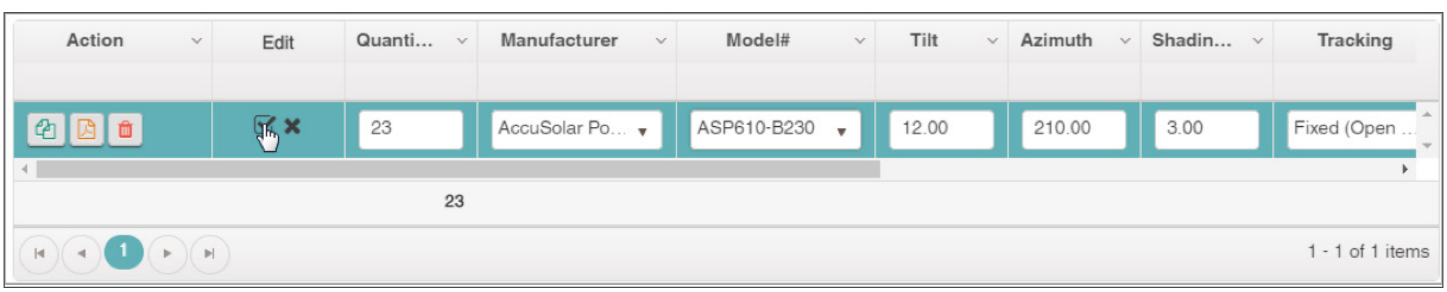


Edit Inverter Information

To change the inverter information, click on the **Edit** button located next to the **Add PV Array** button.

Edit PV Array Information

Saved PV array information will be displayed in a grid with the corresponding inverter frame. To modify PV array information, click on the **Edit** icon for the corresponding line item.



Save the Edited Array

Click (☑) button to save the edited PV array line item.

Click (✕) button to discard the edited PV array line item.

Quick Fill Options

Add Inverter

The **Add Inverter** button is used to add an inverter.

Add PV Array

The **Add PV Array** button is used to add a PV array in an inverter.

Copy Inverter

The **Copy Inverter** function will copy all of the inverter and PV array information and create a new inverter with the copied data.

Delete Inverter

The **Delete Inverter** button deletes an inverter corresponding to it.

Copy PV Array

The **Copy PV Array** button adds a new PV array in the same grid.

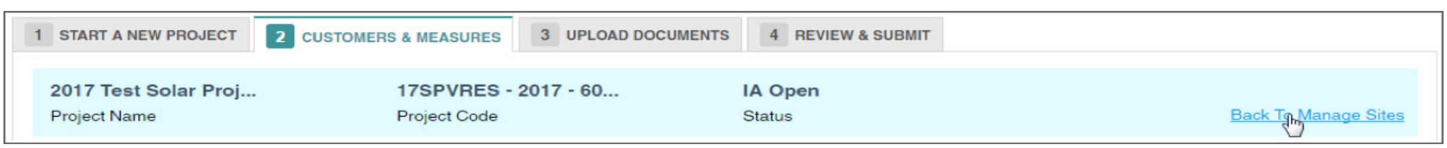
Delete PV Array

The **Delete PV Array** button deletes the corresponding PV array.

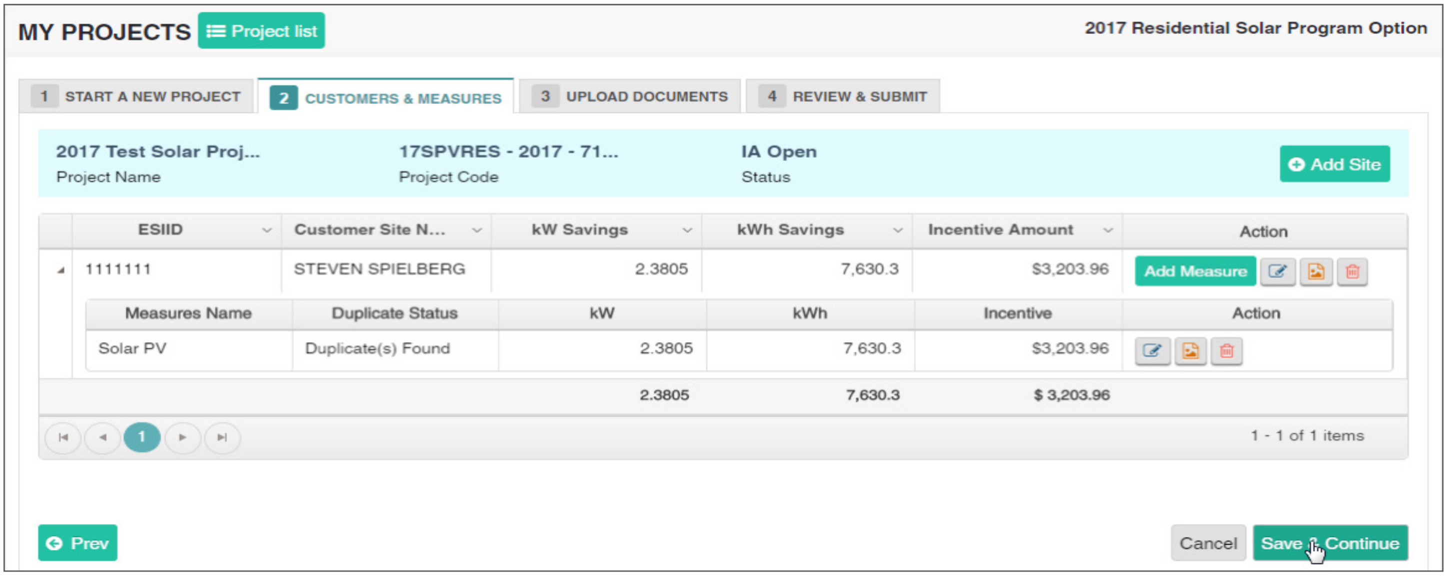
Download PVWatts Result

The PDF icon downloads the calculated PV watts kWh savings results.

Once all of the inverter(s) are added in the **Add Measures** page, click **Back To Manage** Sites at the top of the screen in the project information header.



The added solar measure will be shown in the grid below the site with kW and kWh savings, and the incentive amount.



Click **Save & Continue** to navigate to the **Upload Documents** tab.

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:

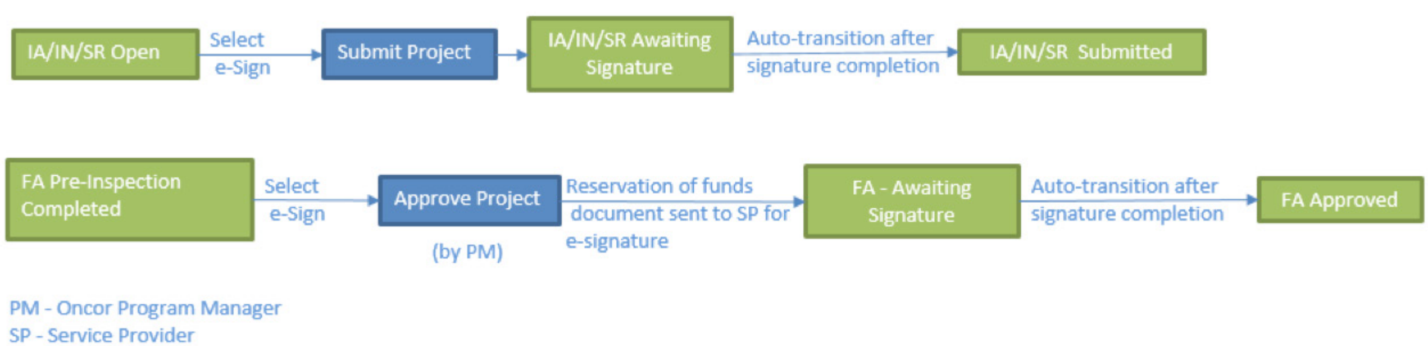
Project Phase	Document	Signatories		
		Customer	Service Provider	Oncor
IA	Host customer agreement	Yes	Yes	
FA	Reservation of funds addendum		Yes	Yes
IN	Installation notice certificate	Yes	Yes	
SR	Savings summary report		Yes	

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.

How to send documents for e-signatures

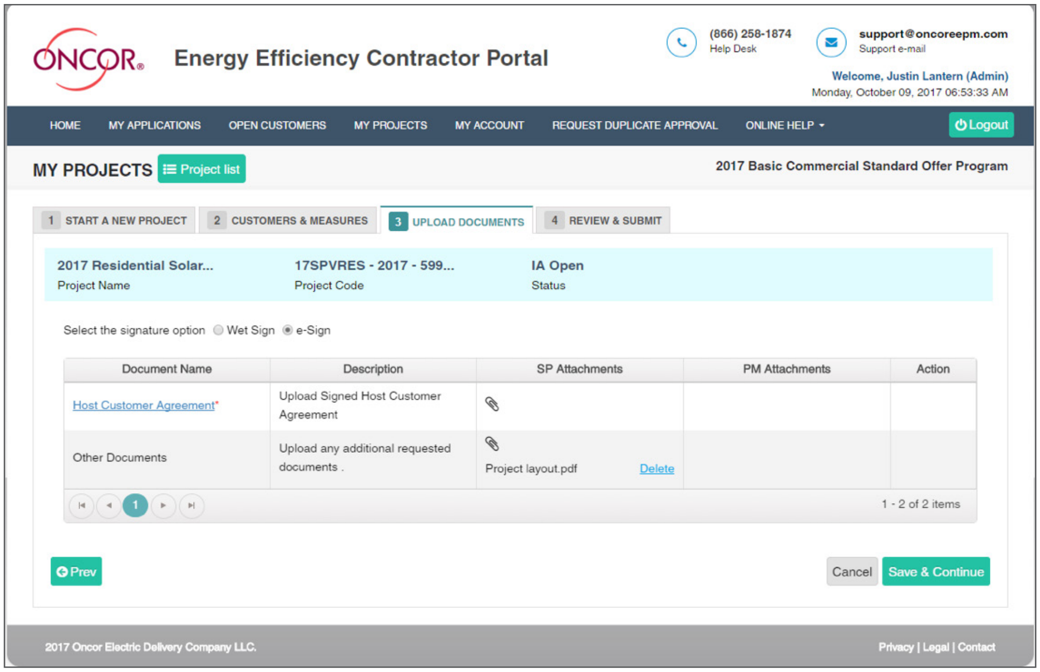
1. Select the “e-sign” signature option to digitally sign the system-generated document.
2. Upload all of the required project support documents other than system-generated documents.
3. Click **Save & Continue** to navigate to the **Review & Submit** tab.
4. After clicking **Submit** in the **Review & 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:

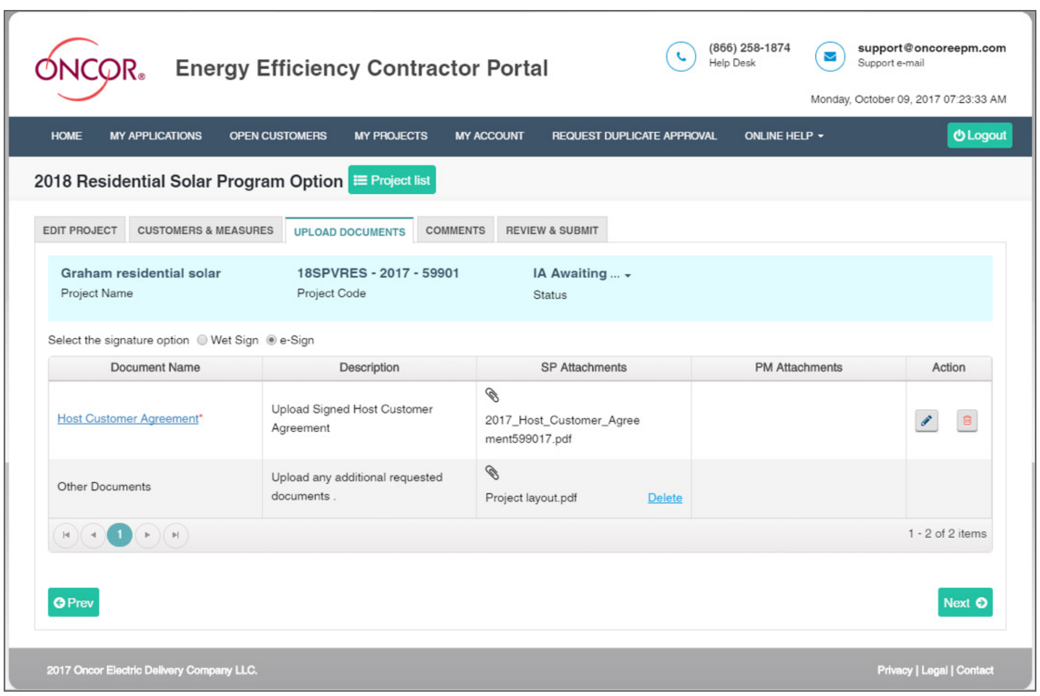


Service providers can also complete a wet sign by manually downloading the document. Click the hyperlink and upload the signed document under the SP Attachments section. For a manual signature, the “Wet sign” signature option should be selected.

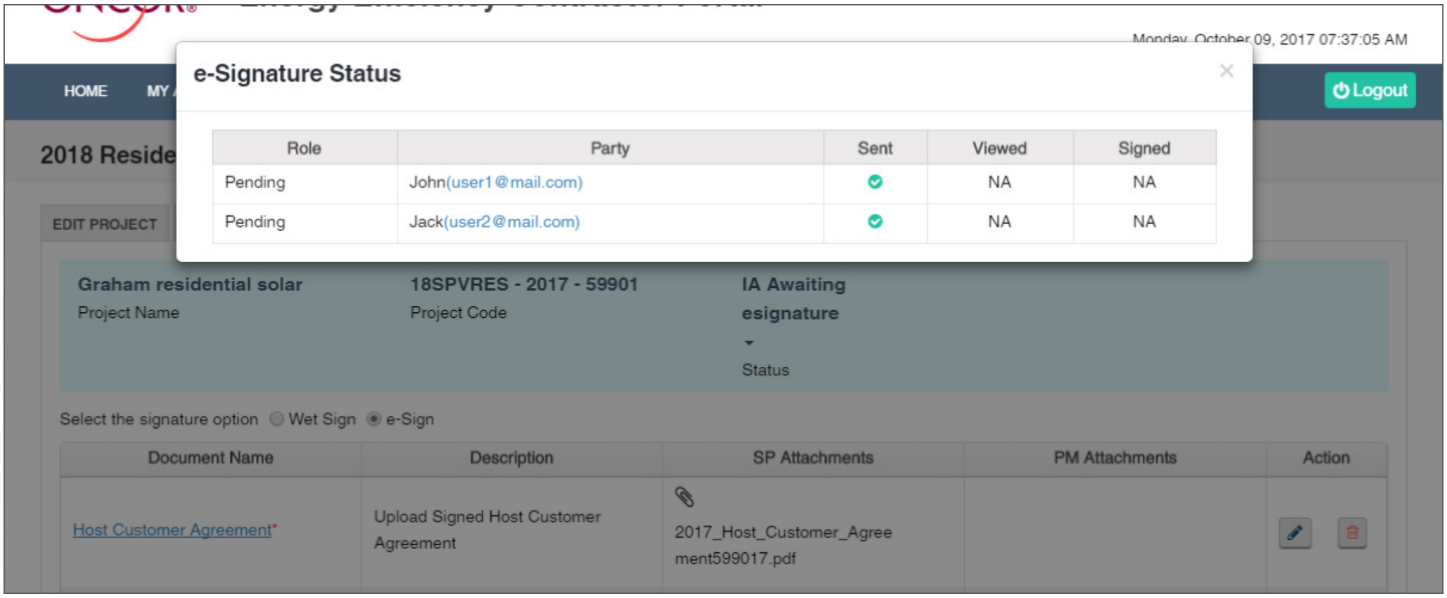
(★) symbol denotes mandatory documents.



Signature option selection



Document sent for signature



Signature status of document

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.

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)

Editing a Project

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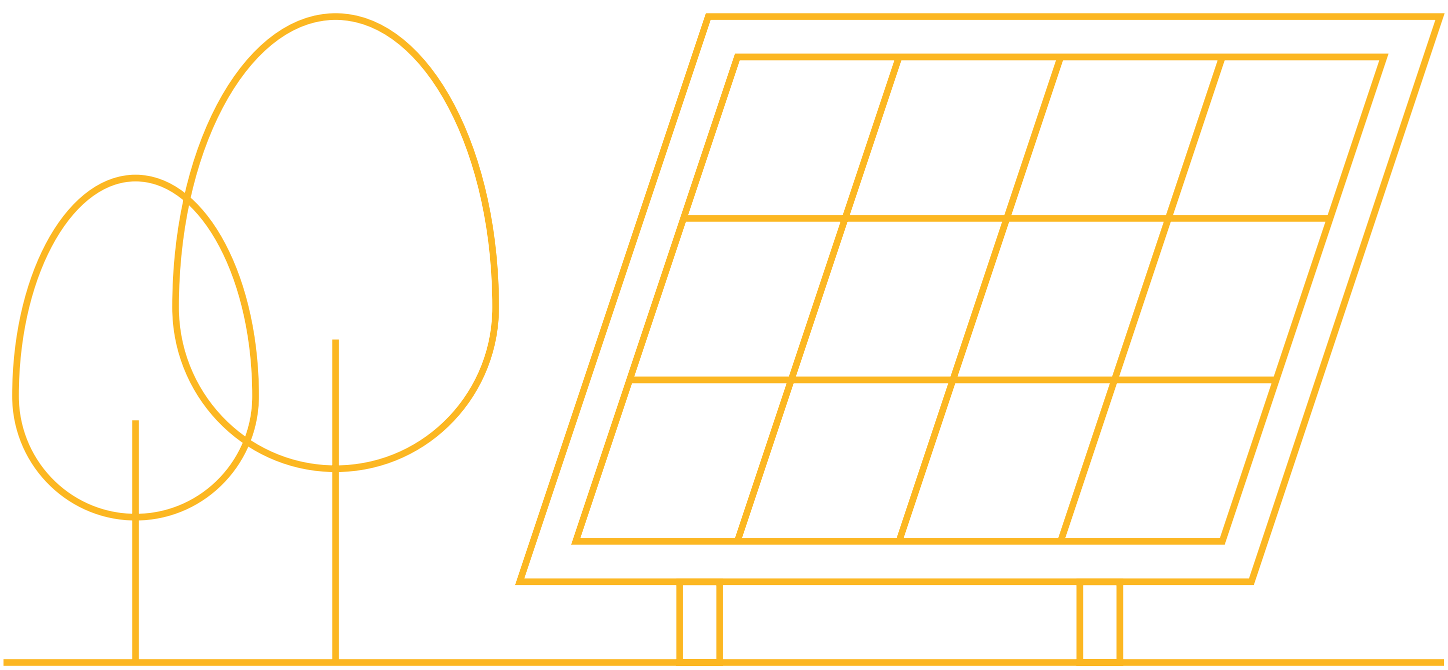
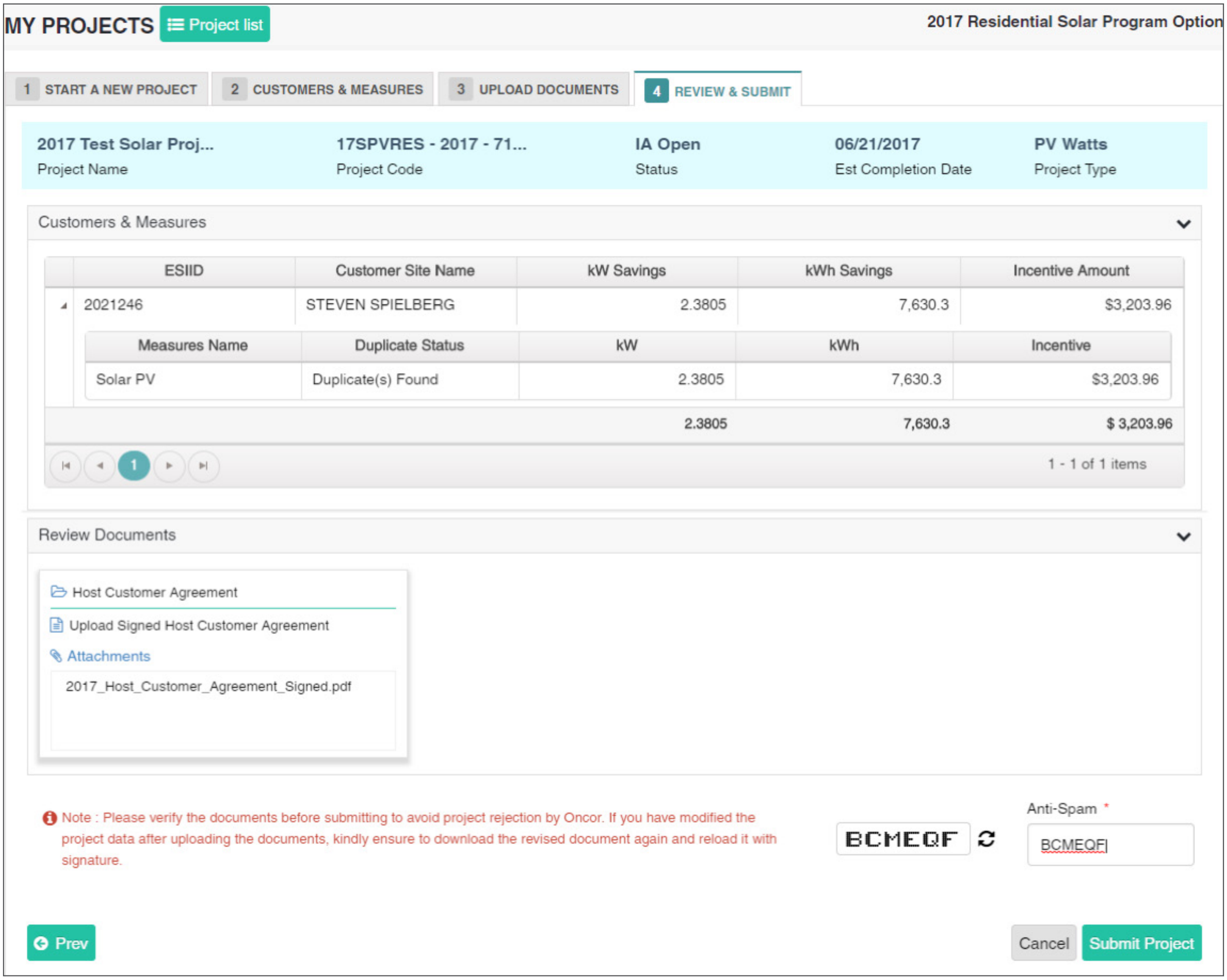




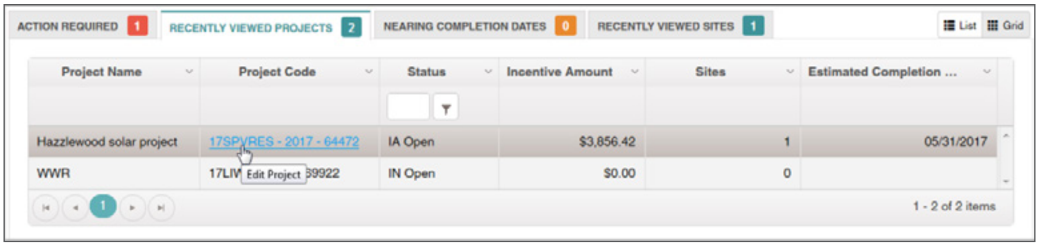
As the project progresses through each stage, users will receive email notifications indicating the status of the project.

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

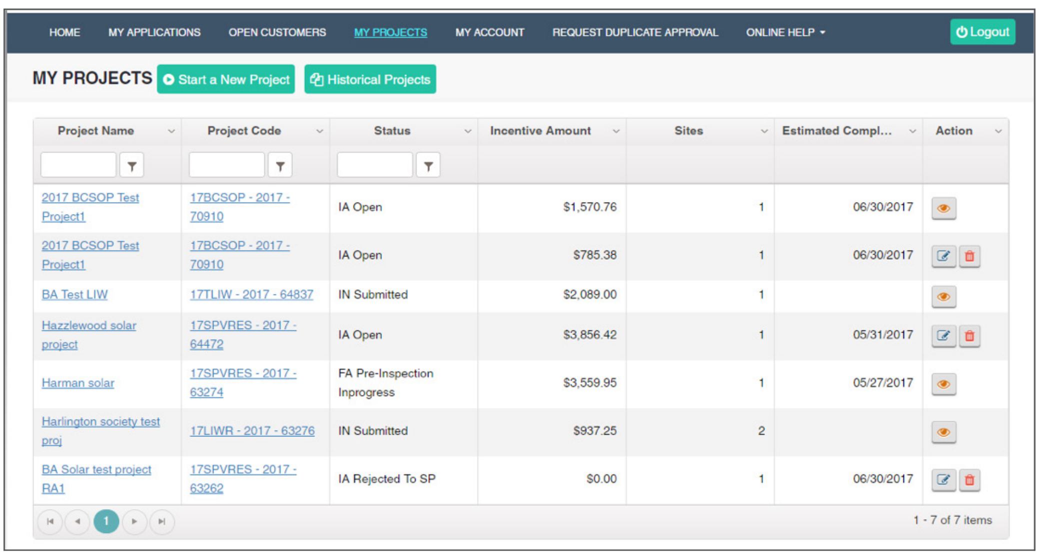
The **Recently Viewed Projects** tab, located in the service provider dashboard menu, lists all recently viewed projects.



- 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.



- 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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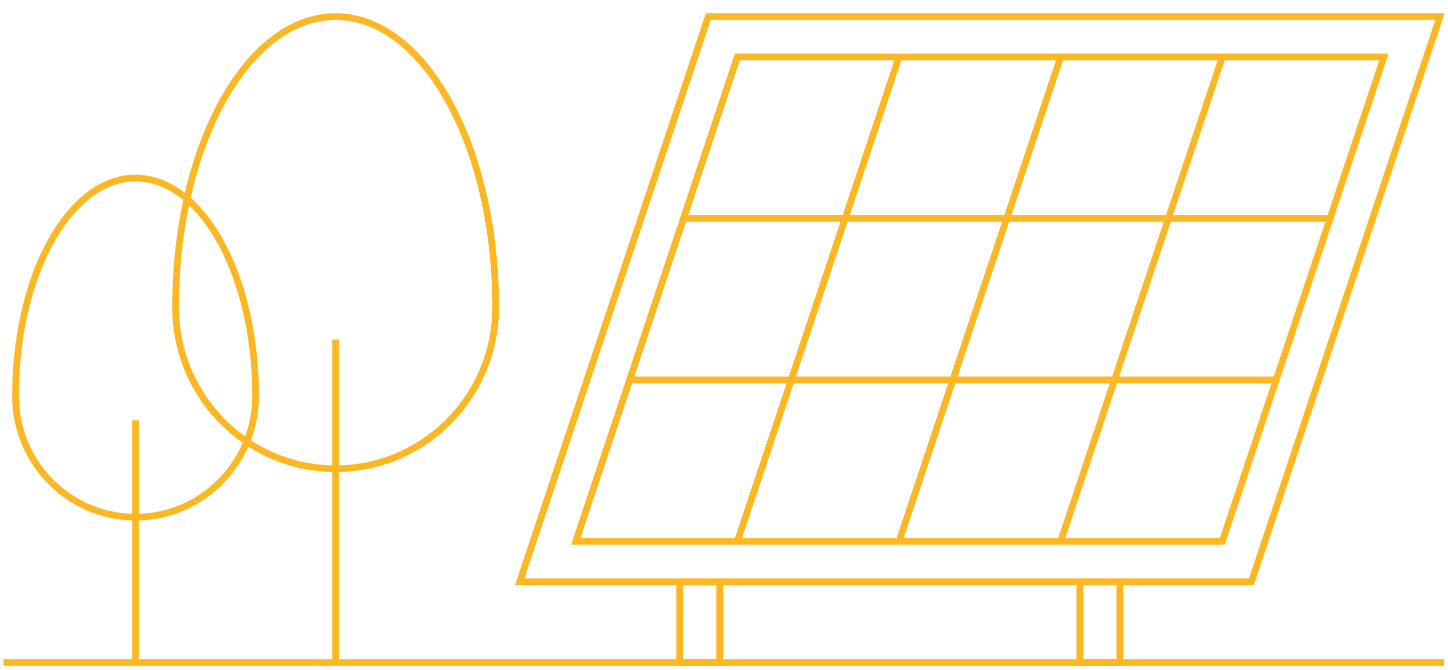
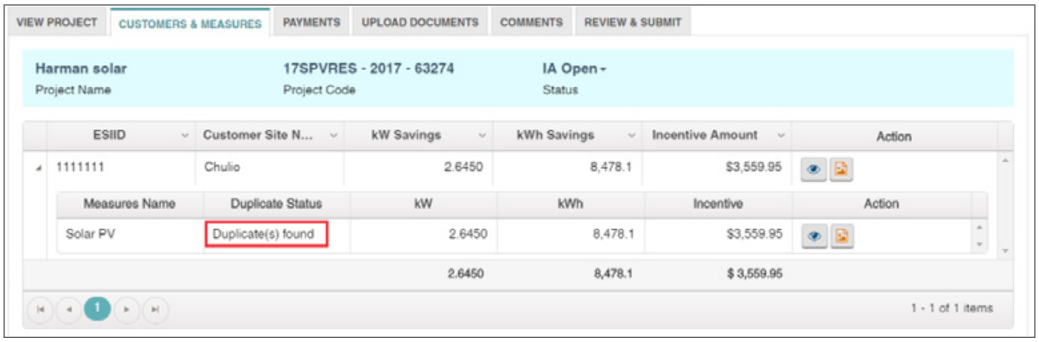
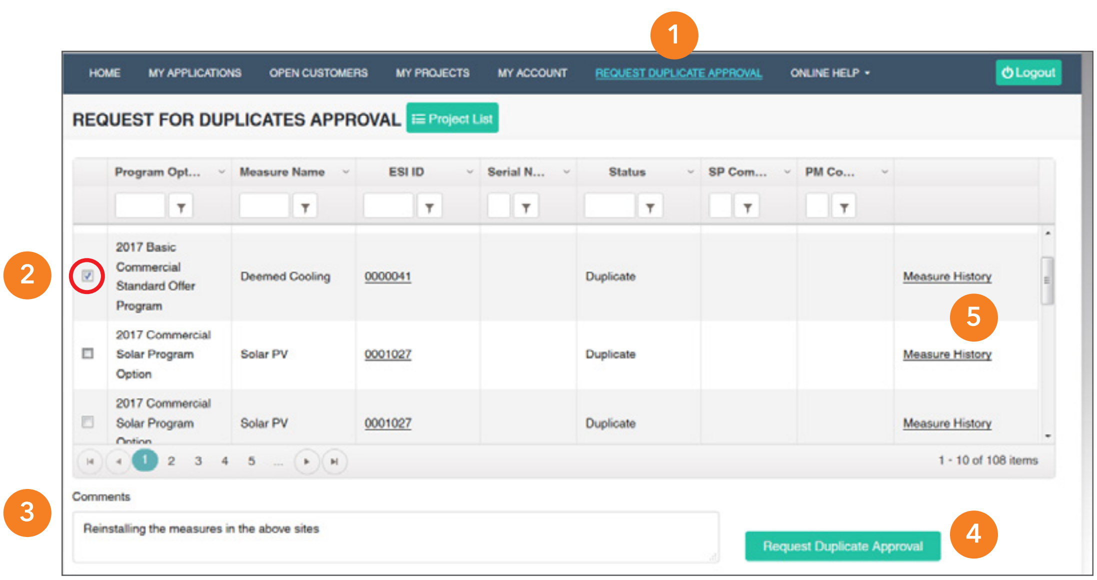


Service providers are not allowed to submit the project if the measure added under the site is duplicated. Duplicate measures must be approved by the Oncor program manager prior to project submission.



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.



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**.