

Oncor 2021 Commercial Load Management (CLM) Program Project Submittal Process

The 2021 CLM Program will open for **Project Submittal on April 30, 2021 at 10 a.m. CT** (Central Time). All projects will be waitlisted in the order received. Service Providers that plan to participate in the CLM Program should enter their Project(s) in EEPM before April 30th and have it ready for submittal.

Helpful Tips

1. Login to the Service Provider EEPM portal (eepm.oncor.com) 15 minutes before EEPM opens for Project Submittal. If you login earlier, your EEPM session might time out due to inactivity.
2. Click the **My Projects** button, click on your **CLM Project**, then click the **Review & Submit** button.
3. EEPM allows multiple users to be logged in to EEPM using the same User ID and Password. This may improve your waitlist number, especially if you experience computer, browser, or network issues at the time of submittal, or have multiple projects to submit.
4. Do not open the same Project in multiple browser windows on an individual computer. Only use one browser window on each computer to submit a project.
5. Do not click on the Refresh or F5 button. If you refresh your screen, you will be redirected to the Edit Project screen and you will then have to navigate to the Review & Submit screen to submit your project.

Project Submittal Steps

(Note: The dates shown in the example EEPM screens below are for illustration purposes only, and are not representative of the 2021 CLM Program Application and Project Submittal dates)

1. Login to EEPM (eepm.oncor.com)

The screenshot displays the Oncor Energy Efficiency Contractor Portal. At the top center is the Oncor logo. Below it, the text reads "ENERGY EFFICIENCY CONTRACTOR PORTAL". There are three navigation buttons: "Tools", "Training Guide", and "Contact Us". A large white box contains a message: "EEPM will open the 2018 Commercial Load Management (CLM) Program for Program Application on April 4, 2018 at 10 a.m. (CT). EEPM will open for Project Submittal on May 2, 2018 at 10 a.m. (CT). All projects will be waitlisted." To the right is a dark blue "LOGIN" form with fields for "User Name" and "Password", a green "LOGIN" button, and links for "Forgot Password?" and "New here? Sign Up". At the bottom, there is contact information: "(866) 258-1874 Help Desk" and "support@oncoreepm.com Support e-mail". Social media icons for Facebook, LinkedIn, and Twitter are also present, along with links for "Privacy | Legal | Contact". The footer contains the copyright notice: "Copyright © 2017 Oncor Electric Delivery Company LLC."

Click on the My Projects button.

The screenshot shows the ONCOR Energy Efficiency Contractor Portal. The header includes the ONCOR logo, the title "Energy Efficiency Contractor Portal", and contact information: (866) 258-1874 Help Desk and support@oncoreepm.com Support e-mail. The user is logged in as "AA AA (Admin)" in a "Production Staging" environment. The navigation menu includes: HOME, MY APPLICATIONS, OPEN CUSTOMERS, MY PROJECTS (circled in red), MY ACCOUNT, REQUEST DUPLICATE APPROVAL, ONLINE HELP, and Logout. Below the navigation, there are summary cards for "ACTIVE PROGRAMS 1", "PROGRAM APPLICATIONS 0", and "ELIGIBLE PROGRAMS 0". A detailed view for "2018 Commercial Load Managem..." is shown, including "Program Budget" (Total: \$222,177.00, Remaining: \$0.60) and "My Budget" (Total: \$44,435.40, Remaining: \$44,435.40). At the bottom, there are summary cards for "ACTION REQUIRED 0", "RECENTLY VIEWED PROJECTS 1", "NEARING COMPLETION DATES 0", and "SIGNATURE DOCUMENTS 0". A table header is visible with columns: Project Name, Project Code, Status, and Alerts / Next Step.

2. Click on the CLM Project Name or Project Code in your project list.

The screenshot shows the "MY PROJECTS" section of the ONCOR Energy Efficiency Contractor Portal. The header is identical to the previous screenshot. The "MY PROJECTS" section includes buttons for "Start a New Project" and "Historical Projects". Below is a table with the following data:

| Project Name | Project Code | Status | Incentive Amount | Sites | Estimated Compl... | Action |
|--------------|----------------------|---------|------------------|-------|--------------------|---|
| CLM Demo 7 | 18CLM - 2018 - 12177 | IA Open | \$8,284.00 | 1 | |   |

The "CLM Demo 7" and "18CLM - 2018 - 12177" are circled in red. The table footer shows "1 - 1 of 1 items". The footer of the page includes "2017 Oncor Electric Delivery Company LLC." and "Privacy | Legal | Contact".

3. This will take you to the Edit Project screen. Next, click on the Review & Submit button.

The screenshot displays the ONCOR Energy Efficiency Contractor Portal interface. At the top, the ONCOR logo is on the left, and contact information (phone: (866) 258-1874, email: support@oncoreepm.com) and user details (Welcome, AA AA (Admin) | Environment: Production Staging) are on the right. A dark navigation bar contains links for HOME, MY APPLICATIONS, OPEN CUSTOMERS, MY PROJECTS, MY ACCOUNT, REQUEST DUPLICATE APPROVAL, ONLINE HELP, and a Logout button. Below this, the page title is '2018 Commercial Load Management' with a 'Project list' button. A secondary navigation bar includes 'EDIT PROJECT', 'CUSTOMERS & MEASURES', 'UPLOAD DOCUMENTS', 'COMMENTS', and 'REVIEW & SUBMIT', with the latter circled in red. The main content area shows project details for '18CLM - 2018 - 12177' (Project Code), 'IA Open' (Status), and 'AA AA' (Created by). Below this is a form with 'Project Name' (CLM Demo 7) and 'Requested kW' (218) fields, with 'Cancel' and 'Save' buttons. A 'Project Savings' table follows, and a 'Next' button is at the bottom right. The footer contains '2017 Oncor Electric Delivery Company LLC.' and 'Privacy | Legal | Contact'.

ONCOR Energy Efficiency Contractor Portal

(866) 258-1874 Help Desk | support@oncoreepm.com Support e-mail
Welcome, AA AA (Admin) | Environment: Production Staging

HOME MY APPLICATIONS OPEN CUSTOMERS MY PROJECTS MY ACCOUNT REQUEST DUPLICATE APPROVAL ONLINE HELP Logout

2018 Commercial Load Management Project list

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

18CLM - 2018 - 12177 IA Open AA AA
Project Code Status Created by

Project Name * Requested kW *
CLM Demo 7 218 Cancel Save

| Project Savings | | | |
|--------------------------------|-----------------------------|---------------------------------|------------------------------|
| 218.0000 Current kW Savings | 0.00 Current kWh Savings | \$8,284.00 Current Incentive | \$0.00 Approved Incentive |
| \$0.00 Funds Blocked | \$0.00 Fund Reserved | \$0.00 IA Deposit | \$0.00 FA Deposit |
| \$0.00 Deposit Forfeit | 0 Waitlist Order | 2018 Program Year | |

Next

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

4. This will take you to the Project Submittal screen. Starting 24 hours prior to the submittal date/time, the countdown clock will appear in the lower right hand corner of your screen.

The screenshot displays the ONCOR Energy Efficiency Contractor Portal interface. At the top, the logo and name "ONCOR. Energy Efficiency Contractor Portal" are visible. Contact information includes a phone number (866) 258-1874 and an email address support@oncoreepm.com. The user is logged in as "AA AA (Admin)" in a "Production Staging" environment. A navigation bar contains links for HOME, MY APPLICATIONS, OPEN CUSTOMERS, MY PROJECTS, MY ACCOUNT, REQUEST DUPLICATE APPROVAL, and ONLINE HELP, along with a Logout button.

The main content area is titled "2018 Commercial Load Management" and includes a "Project list" button. Below this, there are tabs for "EDIT PROJECT", "CUSTOMERS & MEASURES", "UPLOAD DOCUMENTS", "COMMENTS", and "REVIEW & SUBMIT". The "REVIEW & SUBMIT" tab is active, showing project details for "CLM Demo 7" (Project Name) with Project Code "18CLM - 2018 - 12177", Status "IA Open", and Requested kW of "218".

The "CUSTOMERS & MEASURES" section is expanded, showing a summary table and a detailed table. The summary table has the following data:

| No of Sites | kW | kWh | Incentive Amount |
|-------------|----------|------|------------------|
| 1 | 218.0000 | 0.00 | \$8,284.00 |

The detailed table below it has the following data:

| ESIID | Customer Site Name | kW Savings | kWh Savings | Incentive Amount |
|---------|--------------------|------------|-------------|------------------|
| 0003668 | CLM Project data2 | 0.0000 | 0.0 | \$0.00 |

Below the tables, there is a "Review Documents" section with a message "NO RECORDS FOUND." and a "Comments" section with a text input field labeled "Enter Comments".

In the bottom right corner of the main content area, a digital countdown clock is displayed, showing "00:07:53". This clock is circled in red in the image.

At the bottom of the page, there is a "Prev" button and footer text: "2017 Oncor Electric Delivery Company LLC." and "Privacy | Legal | Contact".

5. Wait for the countdown clock in the lower right hand corner to get to 00:00:00. Service Providers are advised to be on the Review & Submit screen at least 2 minutes prior to 10:00 a.m. CT.

ONCOR Energy Efficiency Contractor Portal

(866) 258-1874 Help Desk | support@oncoreepm.com Support e-mail
Welcome, AA AA (Admin) | Environment: Production Staging

HOME MY APPLICATIONS OPEN CUSTOMERS MY PROJECTS MY ACCOUNT REQUEST DUPLICATE APPROVAL ONLINE HELP [Logout](#)

2018 Commercial Load Management [Project list](#)

EDIT PROJECT CUSTOMERS & MEASURES UPLOAD DOCUMENTS COMMENTS REVIEW & SUBMIT

| | | | |
|-----------------------------------|---|----------------------------|----------------------------|
| CLM Demo 7 Project Name | 18CLM - 2018 - 12177 Project Code | IA Open - Status | 218 Requested kW |
|-----------------------------------|---|----------------------------|----------------------------|

Customers & Measures

| No of Sites | kW | kWh | Incentive Amount |
|-------------|----------|------|------------------|
| 1 | 218.0000 | 0.00 | \$8,284.00 |

| ESIID | Customer Site Name | kW Savings | kWh Savings | Incentive Amount |
|---------|--------------------|------------|-------------|------------------|
| 0003668 | CLM Project data2 | 0.0000 | 0.0 | \$0.00 |
| | | 0.0000 | 0.0 | \$ 0.00 |

1 - 1 of 1 Items

Review Documents

NO RECORDS FOUND.

Comments

Enter Comments

00:00:53

[Prev](#)

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

- When the countdown clock gets to 00:00:00 (which corresponds with April 30, 2021, 10 a.m. CT), a Submit button will automatically appear in the lower right hand corner of your screen. You do not need to refresh your screen to get the Submit button. If you refresh, you will be redirected to the Edit Project screen and will lose precious time navigating back to the Review & Submit screen.

ONCOR Energy Efficiency Contractor Portal

(866) 258-1874 Help Desk | support@oncoreepm.com Support e-mail
Welcome, AA AA (Admin) | Environment: Production Staging

HOME MY APPLICATIONS OPEN CUSTOMERS MY PROJECTS MY ACCOUNT REQUEST DUPLICATE APPROVAL ONLINE HELP **Logout**

2018 Commercial Load Management Project list

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

| | | | |
|-----------------------------------|---|----------------------------|----------------------------|
| CLM Demo 7 Project Name | 18CLM - 2018 - 12177 Project Code | IA Open - Status | 218 Requested kW |
|-----------------------------------|---|----------------------------|----------------------------|

Customers & Measures

| | | | |
|-------------------------|-----------------------|--------------------|---------------------------------------|
| 1 No of Sites | 218.0000 kW | 0.00 kWh | \$8,284.00 Incentive Amount |
|-------------------------|-----------------------|--------------------|---------------------------------------|

| ESIID | Customer Site Name | kW Savings | kWh Savings | Incentive Amount |
|---------|--------------------|------------|-------------|------------------|
| 0003688 | CLM Project data2 | 0.0000 | 0.0 | \$0.00 |
| | | 0.0000 | 0.0 | \$ 0.00 |

1 - 1 of 1 items

Review Documents

NO RECORDS FOUND.

Comments

Enter Comments

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.

XOBBYG Anti-Spam

Submit

Prev

7. Enter the Anti-spam text and click on the Submit project button. The Project will then move to a Waitlist. Note that the Anti-spam code is case sensitive. If you want to select a different code, you can click on the two circular arrows to the right of the code.

ONCOR. Energy Efficiency Contractor Portal

(866) 258-1874 Help Desk | support@oncoreepm.com Support e-mail
Welcome, AA AA (Admin) | Environment: Production Staging

HOME MY APPLICATIONS OPEN CUSTOMERS MY PROJECTS MY ACCOUNT REQUEST DUPLICATE APPROVAL ONLINE HELP **Logout**

2018 Commercial Load Management Project list

EDIT PROJECT CUSTOMERS & MEASURES UPLOAD DOCUMENTS COMMENTS REVIEW & SUBMIT

| | | | |
|-----------------------------------|---|--------------------------|----------------------------|
| CLM Demo 7 Project Name | 18CLM - 2018 - 12177 Project Code | IA Open Status | 218 Requested kW |
|-----------------------------------|---|--------------------------|----------------------------|

Customers & Measures

| | | | |
|-------------------------|-----------------------|--------------------|---------------------------------------|
| 1 No of Sites | 218.0000 kW | 0.00 kWh | \$8,284.00 Incentive Amount |
|-------------------------|-----------------------|--------------------|---------------------------------------|

| ESIID | Customer Site Name | kW Savings | kWh Savings | Incentive Amount |
|---------|--------------------|------------|-------------|------------------|
| 0003668 | CLM Project data2 | 0.0000 | 0.0 | \$0.00 |
| | | 0.0000 | 0.0 | \$0.00 |

1 - 1 of 1 items

Review Documents

NO RECORDS FOUND.

Comments

Enter Comments

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.

XOBBYG Anti-Spam * **Submit**

Prev

8. A screen will appear that shows your Project is IA Waitlisted.

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9. Click on your Project Code and select the View Project button to see your Waitlist Order.

The screenshot shows the ONCOR Energy Efficiency Contractor Portal with the "2018 Commercial Load Management" project selected. The header and navigation bar are identical to the previous screenshot. Below the navigation bar, there is a "Project list" button. The main content area displays the project details for "18CLM - 2018 - 12177". The project code is "18CLM - 2018 - 12177", the status is "IA Waitlist...", and it was created by "AA AA". Below the project details, there are input fields for "Project Name" (CLM Demo 7) and "Requested kW" (218). The "Project Savings" section is divided into four columns: Current kW Savings (\$218,000), Current kWh Savings (0.00), Current Incentive (\$8,284.00), and Approved Incentive (\$0.00). Below this, there are four more rows: Funds Blocked (\$0.00), Fund Reserved (\$0.00), IA Deposit (\$0.00), and FA Deposit (\$0.00). The final row shows "Deposit Forfeit" (\$0.00), "11 Waitlist Order" (circled in red), and "2018 Program Year". A "Next" button is located at the bottom right of the project details section. The footer contains "2017 Oncor Electric Delivery Company LLC." and links for Privacy, Legal, and Contact.

10. Congratulations! You have successfully submitted your CLM Project.