



EL PASO ELECTRIC

2010 RESIDENTIAL AND HARD-TO-REACH STANDARD OFFER PROGRAM

USER GUIDE FOR PROJECTS SPONSORS



March 2010

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INTRODUCTION

The User Guide provides Project Sponsors participating in El Paso Electric's Residential and Hard-to-Reach Standard Offer Programs with guidelines on using the online data tracking system. This guide walks you through the steps for filling out the application forms, entering data for efficiency work completed, and invoice reporting.

Large Projects – incentive funds are reserved once for the entire year.

Small Projects – incentive funds are reserved multiple times in smaller increments up to \$5,000 at a time.

This User Guide covers both types of programs.

When working with the online database forms, a few principles should be observed:

- Unless specifically directed to use the browser's buttons, use the navigation buttons provided on the forms.
- Avoid pressing a "submit" or "accept" button multiple times if your browser performance slows. This could result in multiple submissions of the same form.
- Review the entire form before proceeding to ensure that all of the information required is available. If your browser is inactive for more than 30 minutes, you will be automatically logged off and may need to reenter data. To avoid this, try to save your information regularly.
- If you plan to enter data in multiple online database programs, work with only one program at a time. Simultaneously opening multiple browsers can present problems since information is temporarily stored on your computer about each session and could conflict with data from the other program.
- Although not necessary to successfully complete each form, fields should not be left blank. Enter "None" or "N/A" if the field does not apply.

The items in ***bold italics*** are selection items/buttons as they are displayed on the screen.

The online data tracking system used for the Standard Offer Energy Efficiency Programs is ***EnerTrek***[®], developed specifically for the various Standard Offer Programs being implemented by Texas electric utilities. For the sake of discussion purposes, the online data tracking system will be referred to as simply ***EnerTrek***.



To access **EnerTrek**[®], go to El Paso Electric's Standard Offer Program Home Page for the appropriate program.

Residential and Small Commercial SOP - - <http://www.epelectricefficiency.com/rsc.asp>

Hard-to-Reach SOP - - <http://www.epelectricefficiency.com/htr.asp>

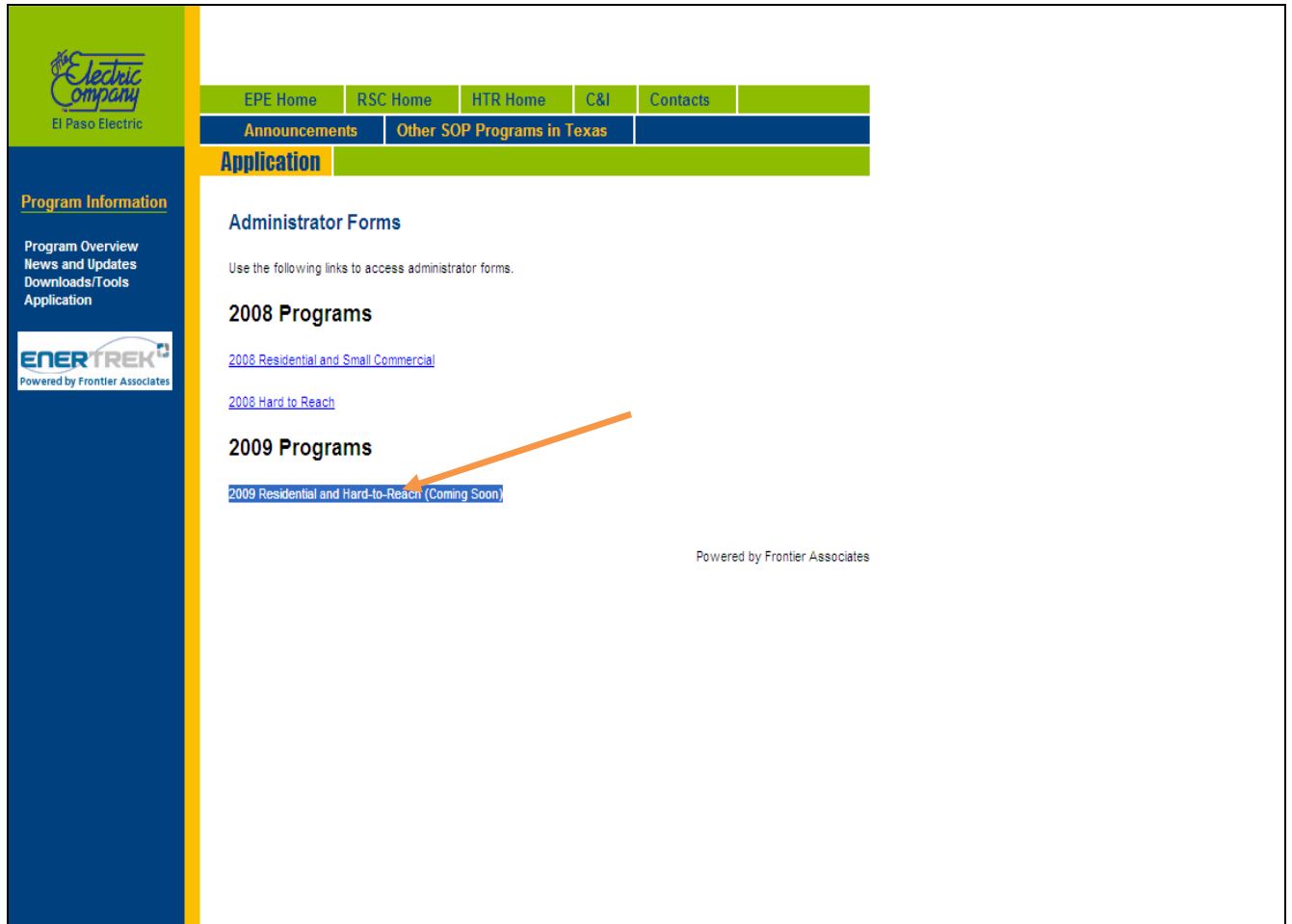
Figure 1: El Paso Electric's Residential SOP Home Page

The screenshot shows the El Paso Electric Residential SOP Home Page. The header includes the El Paso Electric logo and navigation links: EPE Home, RSC Home, HTR Home, C&I, and Contacts. Below the header is a blue bar with 'Announcements' and 'Other SOP Programs in Texas'. The main content area is titled 'Residential and Small Commercial Standard Offer Program' and includes an introduction, program details, and a summary of the RSC program. A left sidebar contains 'Program Information' with links for 'Program Overview', 'News and Updates', 'Downloads/Tools', and 'Application'. An orange arrow points to the 'Application' link. The EnerTrek logo and 'Powered by Frontier Associates' are also visible.

➤ Click on the **Application** link on the left menu bar.

Figure 2: Program Links

- Select the 2010 program link.
- Or you can access the site directly by going to: <http://epe.tx.ressop.com/Login/Login.aspx>



APPLICATION

Figure 3: Login Screen – Register as a New User

- First, register as a new user by clicking on the link in the upper left of the page – *First time users, click here to **Register***.

El Paso Electric
El Paso Electric

El Paso Electric's Texas Standard Offer Programs

El Paso Electric generates and distributes electricity through an interconnected system to approximately 320,000 customers in the Rio Grande Valley in West Texas and Southern New Mexico. In Texas, EPE will offer incentives to energy services contractors for projects producing electricity demand and energy savings.

Contractors may apply separately for projects targeting residential or small commercial (RSC), residential "Hard-to-Reach" (HTR), and large commercial and industrial (C&I) customers. In order to receive incentives under these programs, contractors must apply for and receive a Standard Offer Program Agreement under any of the following programs. Standard Offer Program Agreements are awarded on a first-come, first-served basis in accordance with program procedures described in the program manuals. EPE's online applications forms will be available beginning on December 13, 2006, and will begin accepting applications January 8, 2006 at 10:00 AM Mountain Time for the Large C&I Standard Offer Program and January 15, 2006 at 1:30 PM Mountain Time for the Residential and Small Commercial Standard Offer Program.

Login

User Name

Password

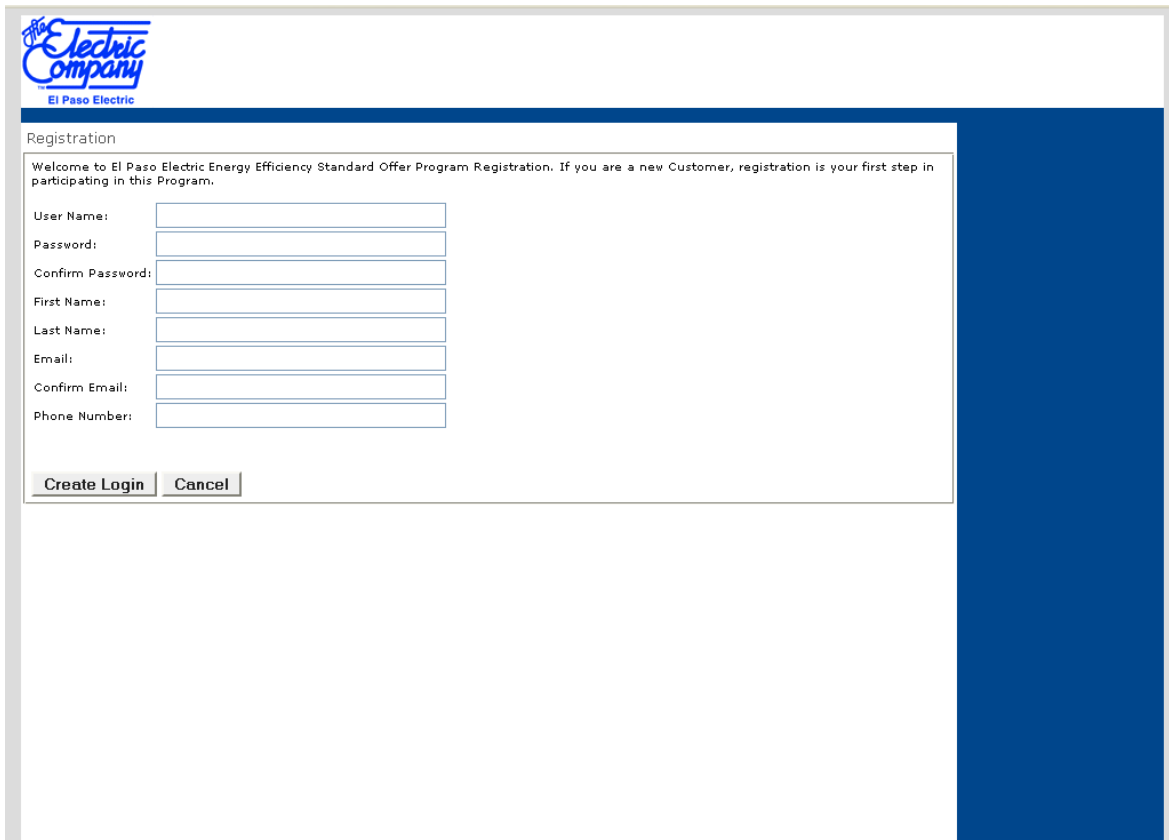
Login

Login Help

- First time users, [click here to Register](#)
- Returning users enter User Name and Password.
- Forgot Your Password? [Click here to reset Password](#)
- Click here to review [On-line Registration Instructions](#)

Figure 4: Registration

- Complete all fields in the registration form. The user name and password are case sensitive.
- When the form is complete, click on **Create Login**.



The screenshot shows a web browser window displaying the registration page for El Paso Electric. The page features the company logo in the top left corner, which includes the text "El Paso Electric" and "Electric Company". Below the logo, the heading "Registration" is displayed. A welcome message reads: "Welcome to El Paso Electric Energy Efficiency Standard Offer Program Registration. If you are a new Customer, registration is your first step in participating in this Program." The form contains several input fields: "User Name:", "Password:", "Confirm Password:", "First Name:", "Last Name:", "Email:", "Confirm Email:", and "Phone Number:". At the bottom of the form, there are two buttons: "Create Login" and "Cancel".

Figure 5: Login

- After the user is registered, click on ***Return to Login Page.***
- Login by filling in the user name and password and clicking on ***Login.***

El Paso Electric

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Contractors may apply separately for projects targeting residential or small commercial (RSC), residential "Hard-to-Reach" (HTR), and large commercial and industrial (C&I) customers. In order to receive incentives under these programs, contractors must apply for and receive a Standard Offer Program Agreement under any of the following programs. Standard Offer Program Agreements are awarded on a first-come, first-served basis in accordance with program procedures described in the program manuals. EPE's online applications forms will be available beginning on December 13, 2006, and will begin accepting applications January 8, 2006 at 10:00 AM Mountain Time for the Large C&I Standard Offer Program and January 15, 2006 at 1:30 PM Mountain Time for the Residential and Small Commercial Standard Offer Program.

Login

User Name:

Password:

Login

Login Help

- First time users, [click here to Register](#)
- Returning users enter User Name and Password.
- Forgot Your Password? [Click here to reset Password](#)
- Click here to review [On-line Registration Instructions](#)

Figure 6: Activate Account

- First activate your account. An email with an activation code was sent to the email address entered at registration. Copy and paste this activation code into the form and click on ***Activate.*** Now click on ***Go to Login Screen.*** You'll be returned to the login page where you will enter your user name and password again.

El Paso Electric

Activation Page

User Login Name:

Activation Code:

Activate **Go to Login Screen**

An activation code has been sent to your email. If you didn't receive an activation email, please contact the Program Manager to reset your account.

Figure 7: Tax ID

- Once logged in, enter the project sponsor's federal tax ID or social security number, then click on **Check Sponsor**. If no duplicate is found, click on the button that appeared stating **Click here to create Sponsor Profile**.

The screenshot shows the 'Sponsor Main' page of the El Paso Electric website. The page features a blue header with the company logo. Below the header, there is a white box containing the following text: 'To find if Sponsor Information has been created please enter your sponsor SSN/company Tax ID in the box below and click 'Check Sponsor' Button.' There are two radio buttons: 'Tax ID Number' (selected) and 'Sponsor SSN'. A text input field contains '00-0000000'. To the right of the input field is a 'Check Sponsor' button.

Figure 8: Profile Update

The screenshot shows a web application interface for updating a sponsor's profile. The page title is "Profile Update" and the sub-header is "Sponsor Company Profile". At the top, there is a navigation menu with "Home", "Settings", "Sponsor Details", and "Help". The date "03/04/2009" and user information "User One | Sign Out" are visible in the top right. Below the header, there are three checkboxes: "Check All that Apply:", "Women Owned", "Minority Owned", and "Disabled Veteran Owned". The form fields are as follows:

- Name of Remittance Company: [Text Field] *
- Project Sponsor Name: [Text Field] *
- Address 1: [Text Field] *
- Address 2: [Text Field]
- City / State / Zip: [Text Field] / TX / [Text Field] *
- Tax ID Number: 00-0000000 * Tax ID SSN
- Parent Company: [Text Field]
- Parent Company Tax ID Number: [Text Field] Tax ID SSN
- Contact Title: [Text Field]
- Contact Person: [Text Field] *
- Company Phone 1: [Text Field] *
- Company Phone 2: [Text Field]
- Company FAX: [Text Field]
- Website: [Text Field]
- Company Email: [Text Field] *

* Indicates a required field

Save Sponsor Profile

- Complete the Profile Update form and click on the *Save Sponsor Profile* button at the bottom of the form.

Figure 9: Sponsor Details

The screenshot displays the 'Sponsor Details' page in the El Paso Electric web application. The top navigation bar includes 'Home', 'Settings', 'Sponsor Details', and 'Help'. A dropdown menu under 'Sponsor Details' is open, showing 'Sponsor Profile', 'Subcontractor Info', 'Affiliated Firms Info', and 'Qualification Documents'. Three orange arrows point to these three options. The main content area is titled 'Sponsor Company Profile' and features a 'Check All that Apply' section with three checked checkboxes: 'Women Owned', 'Minority Owned', and 'Disabled Veteran Owned'. Below this, there are several form fields: 'Name of Remittance Company' (Test Contracting Company), 'Project Sponsor Name' (John Doe), 'Address 1' (111 Sesame Street), 'Address 2' (empty), 'City / State / Zip' (La La Land / TX / 1111111111), 'Tax ID Number' (00-0000000), 'Parent Company' (empty), 'Parent Company Tax ID Number' (empty), 'Contact Title' (empty), 'Contact Person' (John Doe), 'Company Phone 1' ((555)555-5555), 'Company Phone 2' (empty), 'Company FAX' (empty), and 'Website' (empty).

- On the top menu, click on Sponsor Details to see the dropdown list of 3 more forms to be filled out.
 - Subcontractor Information
 - Affiliate Information
 - Qualifications
- All of the information under Sponsor Details will be used for all of the EPE Residential and HTR programs so these sections only have to be filled out once.

Figure 10: Subcontractor Information

- Enter the subcontractor information and click on *Add New Subcontractor*.
- To add multiple subcontractors, come back to this form and fill it out for each subcontractor that will work for you under any of the Large and Small, Residential and Hard-to-Reach programs.

Subcontractor Update

✔ Subcontractor information Updated Successfully.

Subcontractor Info

Click on Subcontractor Name to Edit

Subcontractor Name	First Name	Last Name	Phone	Email	Website
Sub1	test				
Sub2		test			
Sub3					

Subcontractor Name:

Tax ID Number:

Parent Company:

Parent Company Tax ID Number:

Address 1:

Address 2:

City / State / Zip:

Contact Title:

Contact First Name:

Contact Last Name:

Company Phone 1:

Company Phone 2:

Company FAX:

Website:

Company Email:

Tax ID SSN

 Tax ID SSN

 / TX /

Add New
Update
Remove

To remove a subcontractor from your application, click on the subcontractor name in the list at the top of the page, then click on the *Remove* button.

Figure 11: Affiliated Firms

- Enter the information for the affiliated firms and click on the *Add New Affiliated Firm*.
- Repeat this process for multiple affiliated firms.

Affiliated Firms Update

Affiliated Firms Info
Click on Affiliated Firm Name to Edit

Affiliated Firm Name:

Tax ID Number: Tax ID SSN

Parent Company:

Parent Company TaxID Number: Tax ID SSN

Address 1:

Address 2:

City / State / Zip: / TX

Contact Title:

Contact First Name:

Contact Last Name:

Company Phone 1:

Company Phone 2:

Company FAX:

Website:

Company Email:

To remove an affiliate firm from your application, click on the affiliate name in the list at the top of the page, then click on the *Remove* button.

Figure 12: Qualification Documents

- Enter the information about the sponsor’s and subcontractor’s qualifications. When all fields are complete, click on the **Accept Company Qualifications Documentation**.

Qualification Documents Update

Qualification Documents Info
Complete all required information and use this form to ensure that all required information has been submitted either through the Internet or through supplemental materials, as appropriate.

Qualification
Complete all required information and use this form to ensure that all required information has been submitted either through the Internet or through supplemental materials, as appropriate.
Has project sponsor participated in any Texas utility standard offer program?
 Yes No
If yes, please provide the following:
Utility name(s) and project completion date(s)
Contract amount(s)
Project contact(s)

Statement of technical and managerial capabilities and experience (500 word maximum): (required field)

Evidence that Project Sponsor and its Sub-Contractors possess all applicable licenses. Evidence includes a list of all applicable licenses, issuing agencies and license numbers. (required field)

Reference
Descriptions and references (at least three) for comparable projects, including information about the year the project was undertaken, the services provided, and the estimated and actual performance of the energy-efficiency equipment. Provide a contact name, title, address and phone number for each reference.
a. Reference 1: (required field)
b. Reference 2: (required field)
c. Reference 3: (required field)

Disclosure of any legal judgments entered against Project Sponsor in the previous two years, as well as a current list of pending litigation filed by or against Project Sponsor. (required field)

Accept Company Qualifications Documentation

- Once all sections under the Sponsor Details are complete, click on **Home** on the top menu bar.

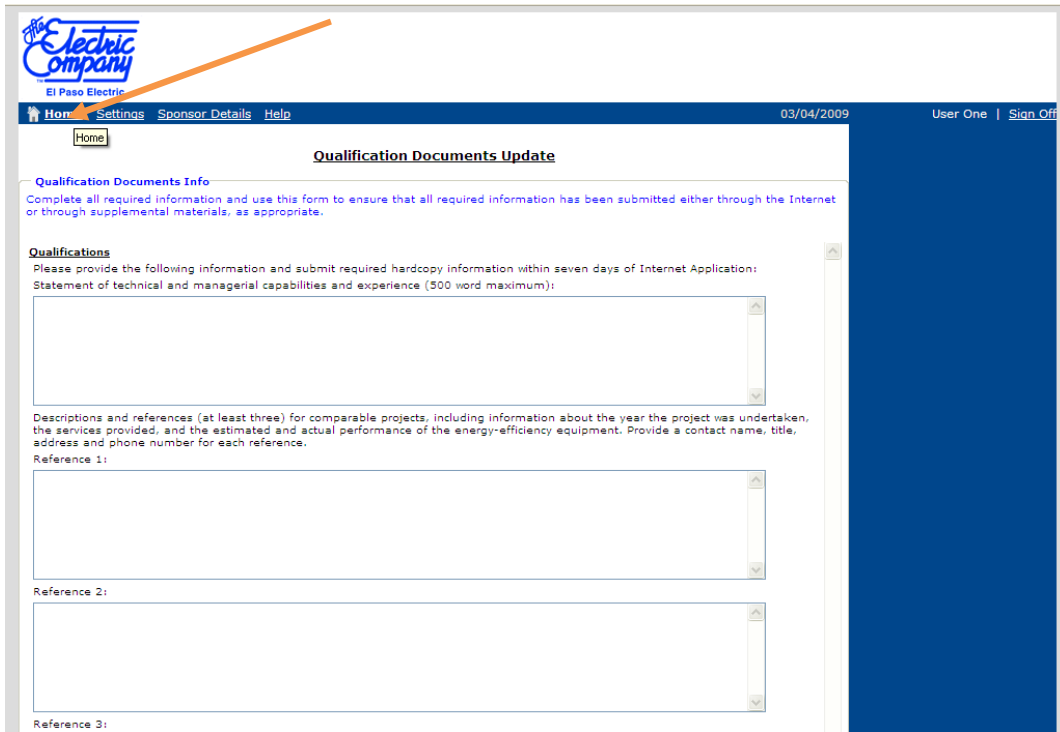


Figure 13: Home – List of SOP Programs

- To create an application for a specific program, click on **Create Application** for the appropriate program.

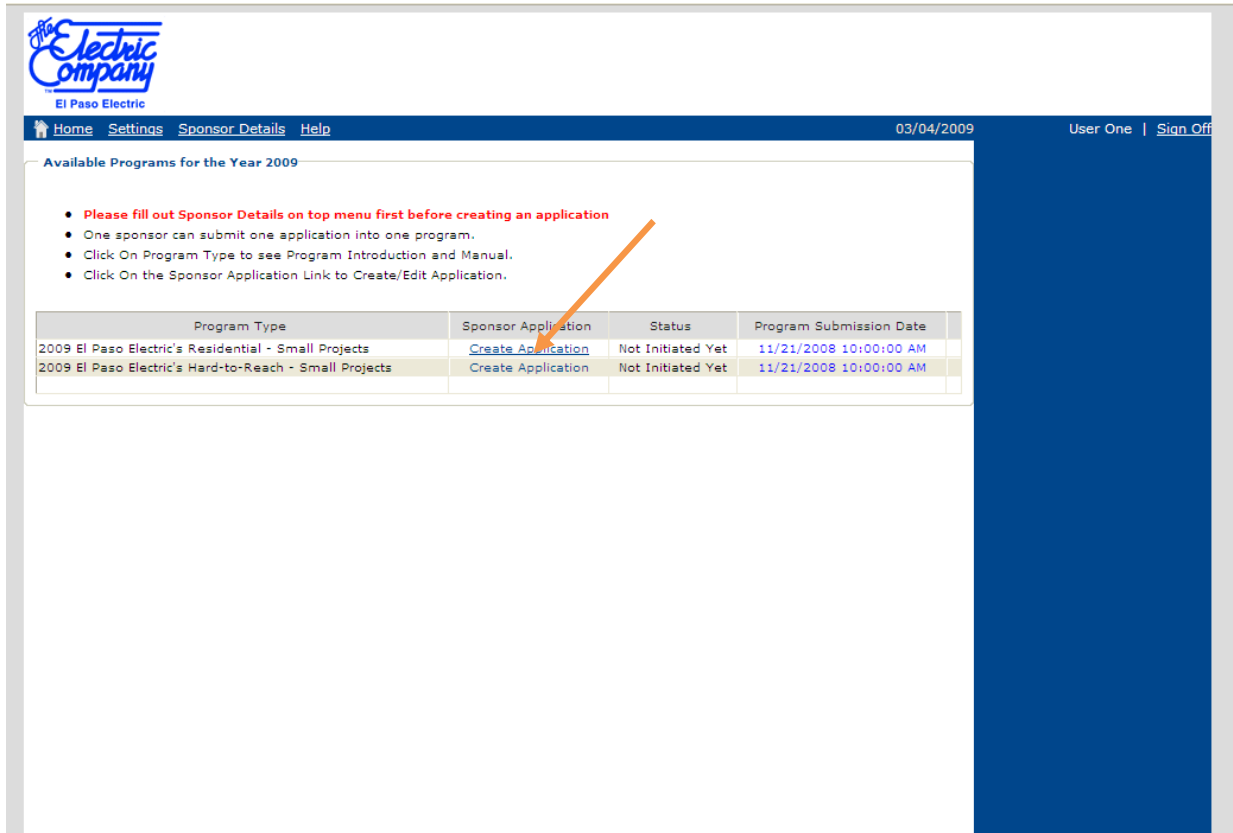


Figure 14: Program Application Summary

- This page displays a summary of the application.
- On the right side of the screen is the Application Menu which indicates the various sections of the application project description.
- When each section is complete, a check mark will appear in the box. The application cannot be submitted until all sections are complete.

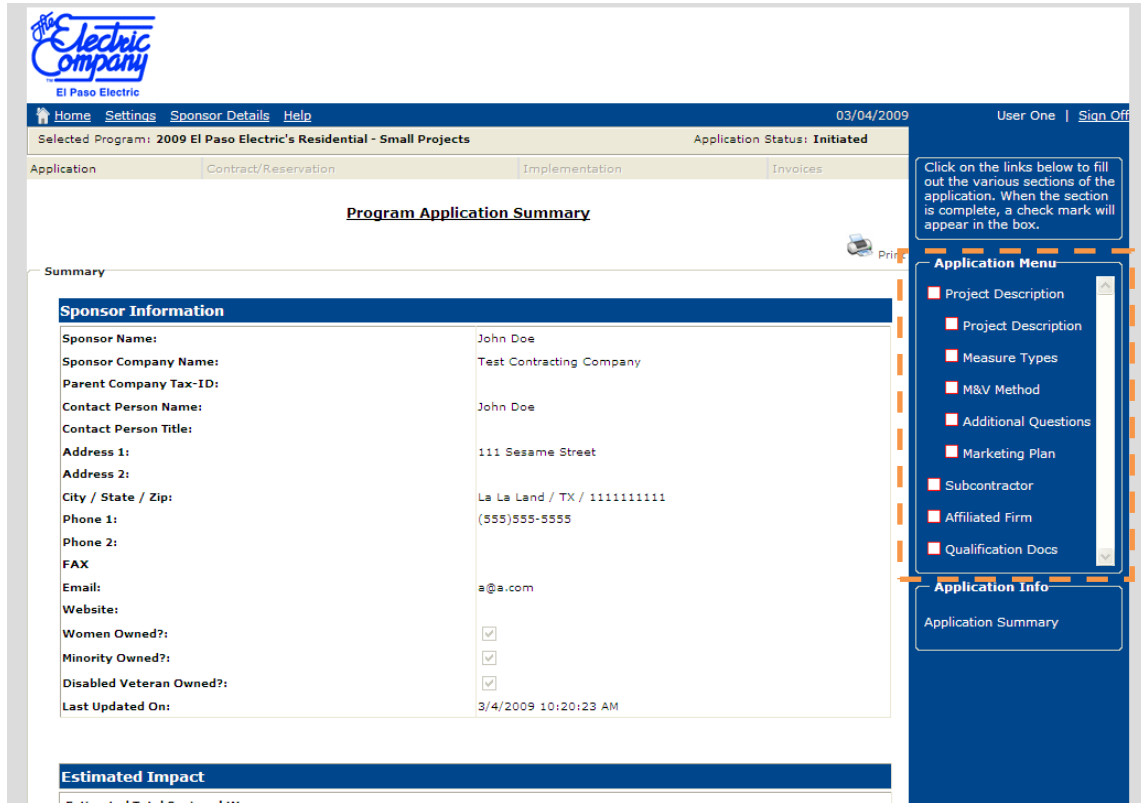


Figure 15: Project Description

- Click on **Description** in the right menu to access the Project Description form.
- Enter a description of the proposed project for this program, then click on **Update Project Description**.

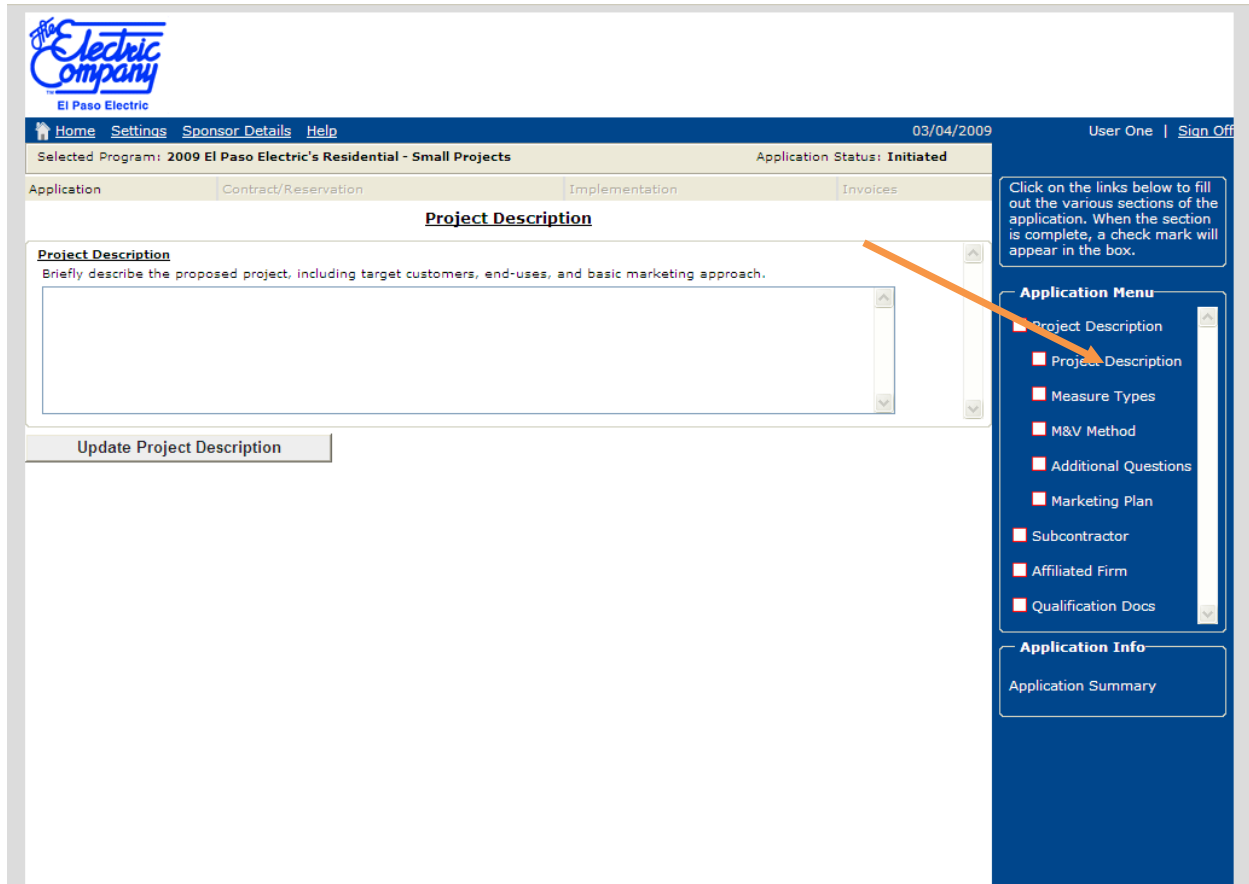


Figure 16: Measure Types

- Please check all measures you will install under this program, then click on **Update Project Description**.

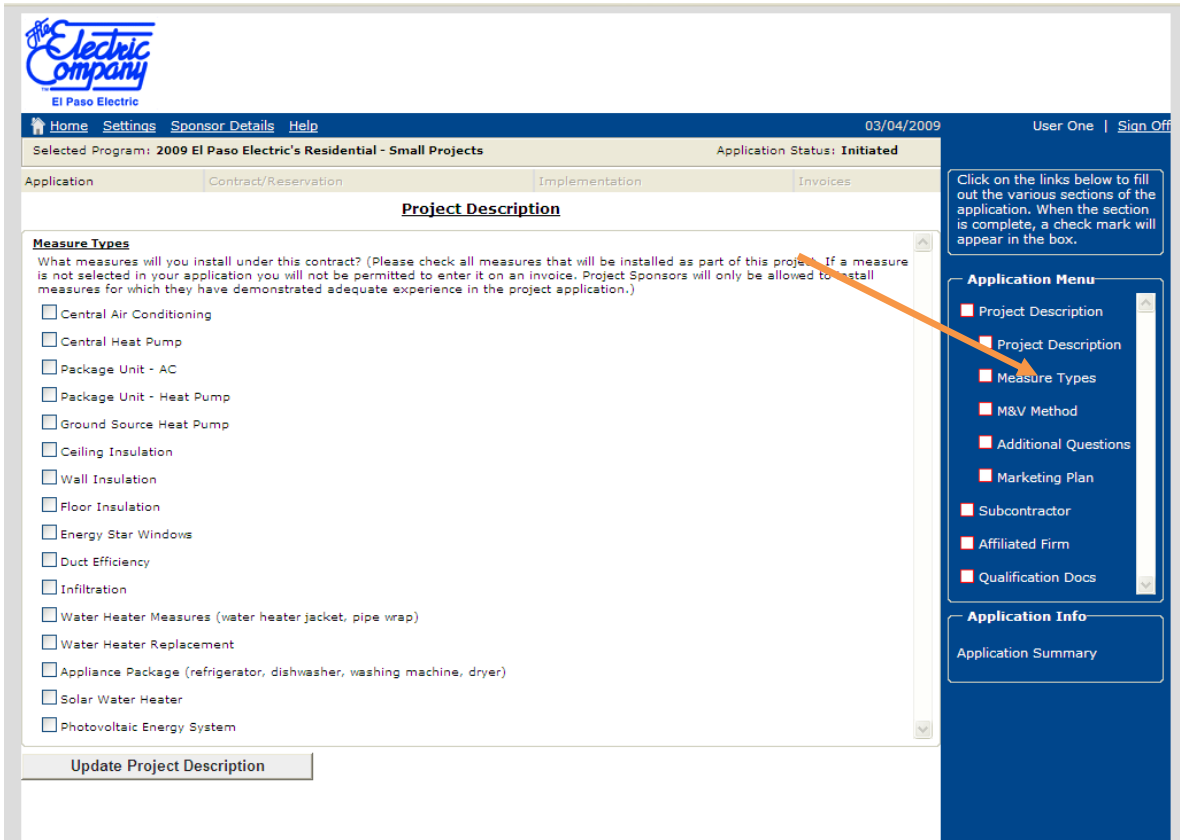


Figure 17: M&V Method

- Indicate which type of savings values you will use for this project, then click on **Update Project Information**.

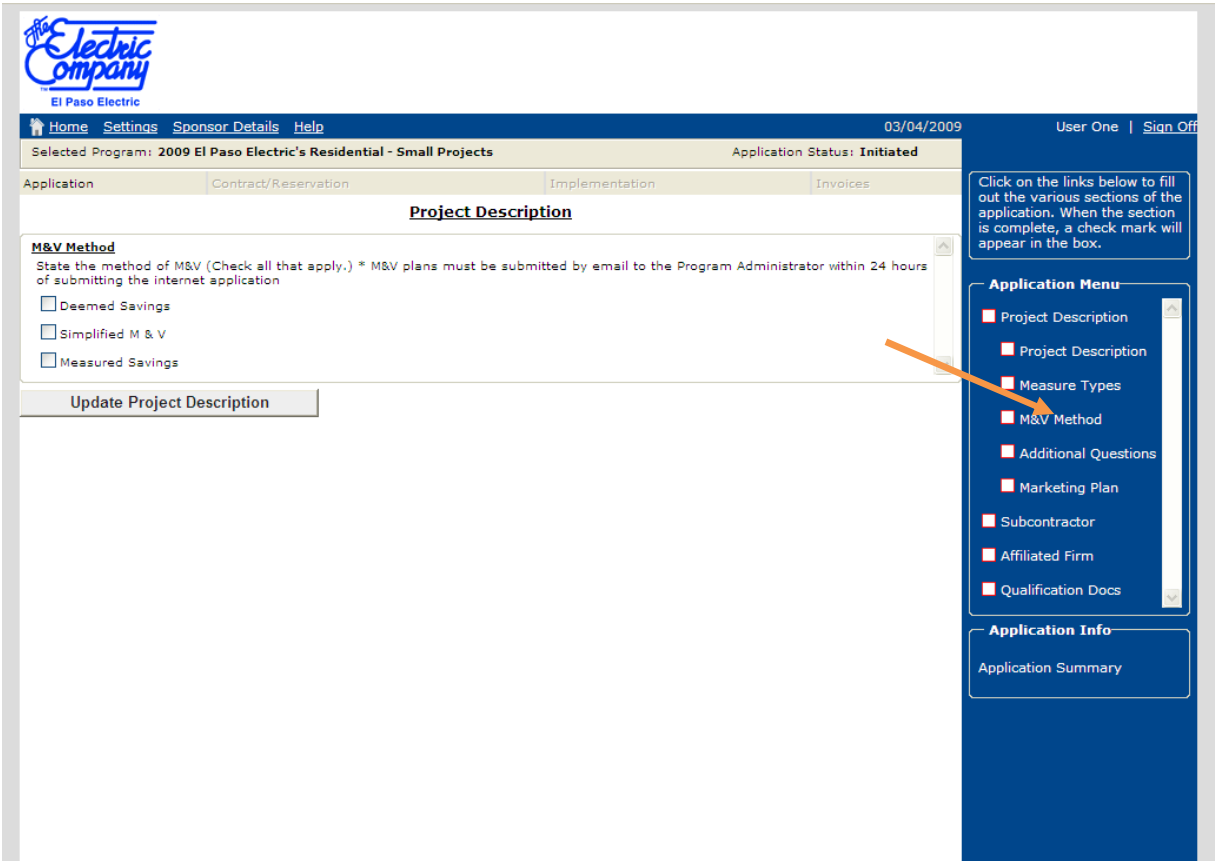


Figure 18: Additional Questions

- Please answer the additional questions on this form. Click on **Update Project Description**.

The screenshot displays the El Paso Electric web application interface. At the top left is the El Paso Electric logo. The navigation bar includes links for Home, Settings, Sponsor Details, and Help. The current date is 03/04/2009, and the user is identified as User One. The application status is 'Initiated'. The selected program is '2009 El Paso Electric's Residential - Small Projects'. The main content area is titled 'Project Description' and contains the 'Additional Questions' section. This section includes two checkboxes: 'Project Sponsor' and 'Subcontractor'. Below these is a text area for describing the contractor's experience. A radio button question asks if the contractor has previously provided measures as part of a Texas utility standard offer program. Another text area is provided for listing recent contracts. An 'Application Menu' on the right side of the page lists various sections, with 'Additional Questions' highlighted by an orange arrow.

Figure 19: Marketing Plan

- Fill in sections of the marketing plan and click on *Update Project Description*.

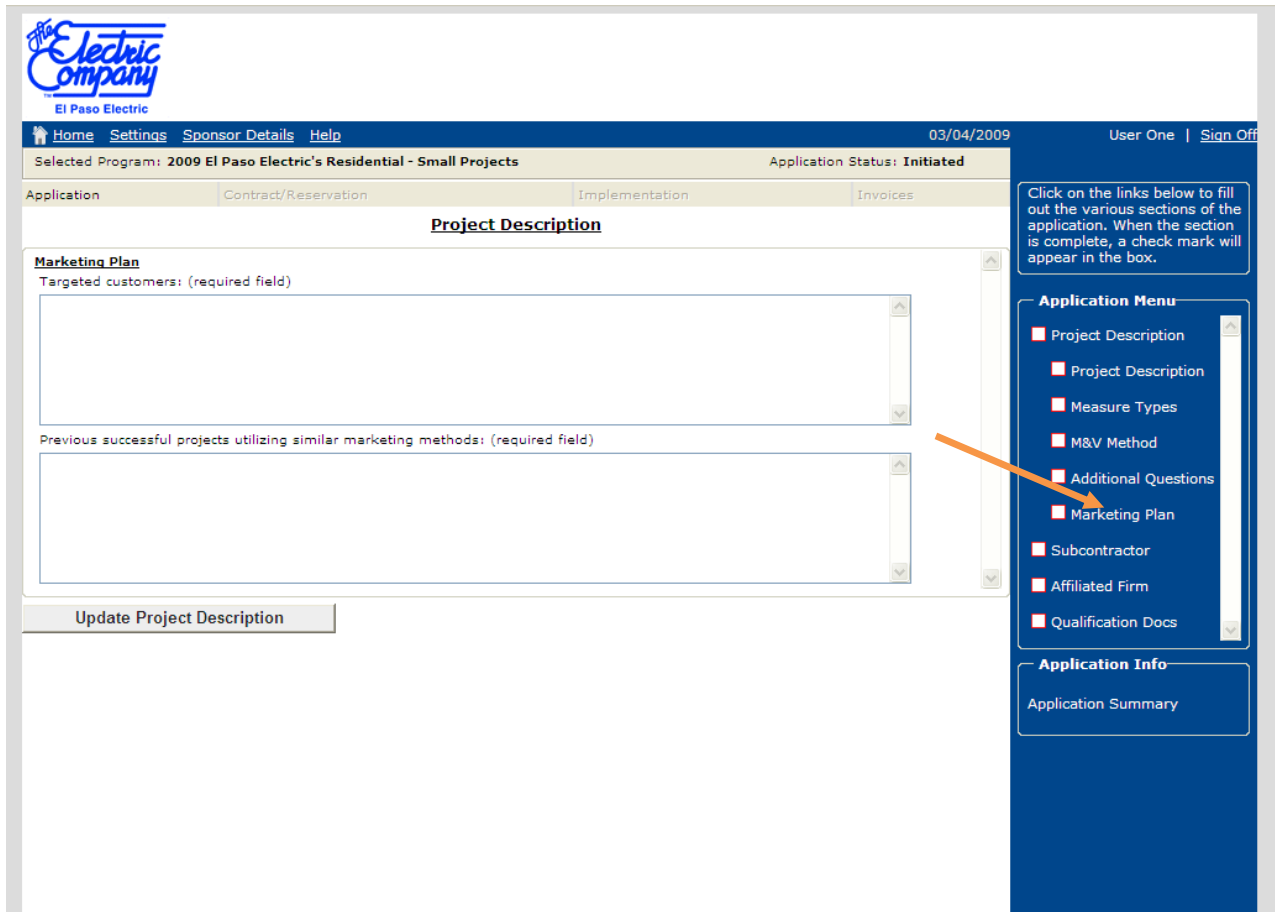


Figure 20: Select Subcontractors

- Choose the subcontractors that will be working in this program for you or click on the box stating you will not use subcontractors. After desired boxes are selected, click on **Update Subcontractor Selection**.

El Paso Electric
El Paso Electric

Home Settings Sponsor Details Help 03/04/2009 User One | Sign Off

Selected Program: 2009 El Paso Electric's Residential - Small Projects Application Status: **Initiated**

Application Contract/Reservation Implementation Invoices

Select Subcontractor

Select Check box to Add Subcontractor to Program Application

SubContractor Name	Select to Add Subcontractor	Contact First Name	Contact Last Name	Contact Phone	Contact Email	Website
Sub1	<input type="checkbox"/>					
Sub2	<input type="checkbox"/>					
Sub3	<input type="checkbox"/>					

Check here if you will not use Subcontractors

Update Subcontractor Selection

Click on the links below to fill out the various sections of the application. When the section is complete, a check mark will appear in the box.

Application Menu

- Project Description
- Project Description
- Measure Types
- M&V Method
- Additional Questions
- Marketing Plan
- Subcontractor**
- Affiliated Firm
- Qualification Docs

Application Info

Application Summary

Figure 21: Select Affiliate Firms

- Choose the affiliate firms or click on the box stating you have no affiliates, and then click on the *Update Affiliate Firms Selection*.

El Paso Electric
El Paso Electric

Home Settings Sponsor Details Help 03/04/2009 User One | Sign Off

Selected Program: 2009 El Paso Electric's Residential - Small Projects Application Status: **Initiated**

Application Contract/Reservation Implementation Invoices

Select Affiliated Firms

Select Check box to Add Affiliated Firm to Program Application

Affiliated Firm Name	Select To Add Affiliated Firm	Contact First Name	Contact Last Name	Contact Phone	Contact Email	Website
Firm1	<input type="checkbox"/>					
Firm2	<input type="checkbox"/>					
Firm3	<input type="checkbox"/>					

If you have **NO Affiliated Firm**, you must check the following box before submitting your application.

I have read and understand the PUCT-approved definition of an affiliate firm (see the SOP Manual). Applicant has no affiliate firm relationships that would qualify under this definition.

Update Affiliated Firms Selection

Click on the links below to fill out the various sections of the application. When the section is complete, a check mark will appear in the box.

Application Menu

- Project Description
- Project Description
- Measure Types
- M&V Method
- Additional Questions
- Marketing Plan
- Subcontractor
- Affiliated Firm**
- Qualification Docs

Application Info

Application Summary

Figure 22: Complete Qualification Docs

- If you haven't completed the Qualification Docs, you will need to do it before your application is complete.
- When all fields are complete, click on ***Accept Company Qualifications Documentation***.

The screenshot shows a web application interface for El Paso Electric. At the top left is the company logo. A navigation bar contains links for Home, Settings, Sponsor Details, and Help. The date 03/04/2009 and the user name 'User One | Sign Off' are displayed on the right. The main content area is titled 'Qualification Documents Update' and contains the following sections:

- Qualification Documents Info:** A section with instructions to complete all required information.
- Qualifications:** A section with a text area for a 'Statement of technical and managerial capabilities and experience (500 word maximum)'. The text area contains the word 'Test'.
- Reference 1:** A text area for project descriptions and references. The text area contains the word 'Test'. A tooltip is visible over this field with the text 'Please enter 'None' if there is no answer'.
- Reference 2:** A text area for project descriptions and references. The text area contains the word 'Test'.
- Reference 3:** A text area for project descriptions and references. The text area contains the word 'Test'.

Figure 23: Application Complete

- When all sections of the Application Menu indicate complete with a check mark, the application is ready to be submitted on the designated submit date and time.

The screenshot displays the El Paso Electric application interface. At the top left is the El Paso Electric logo. The navigation bar includes links for Home, Settings, Sponsor Details, and Help. The current date is 03/04/2009, and the user is identified as User One. The selected program is "2009 El Paso Electric's Residential - Small Projects" and the application status is "Initiated".

The main content area is titled "Program Application Summary" and contains a "Summary" section. The "Sponsor Information" section lists the following details:

Sponsor Name:	John Doe
Sponsor Company Name:	Test Contracting Company
Parent Company Tax-ID:	
Contact Person Name:	John Doe
Contact Person Title:	
Address 1:	111 Sesame Street
Address 2:	
City / State / Zip:	La La Land / TX / 1111111111
Phone 1:	(555)555-5555
Phone 2:	
FAX:	
Email:	a@a.com
Website:	
Women Owned?:	<input checked="" type="checkbox"/>
Minority Owned?:	<input checked="" type="checkbox"/>
Disabled Veteran Owned?:	<input checked="" type="checkbox"/>
Last Updated On:	3/4/2009 10:20:23 AM

Below the sponsor information is the "Estimated Impact" section, which is partially visible.

On the right side of the interface, there is an "Application Menu" with a list of items, each accompanied by a checked checkbox, indicating that all sections are complete:

- Project Description
- Project Description
- Measure Types
- M&V Method
- Additional Questions
- Marketing Plan
- Subcontractor
- Affiliated Firm
- Qualification Docs

Below the application menu is an "Application Info" section with a link for "Application Summary". A callout box on the right side of the application menu provides instructions: "Click on the links below to fill out the various sections of the application. When the section is complete, a check mark will appear in the box."

Figure 24: Submission Day

- On the application submission date, login and click on the button that says **Ready to Submit** for the program you're submitting an application.

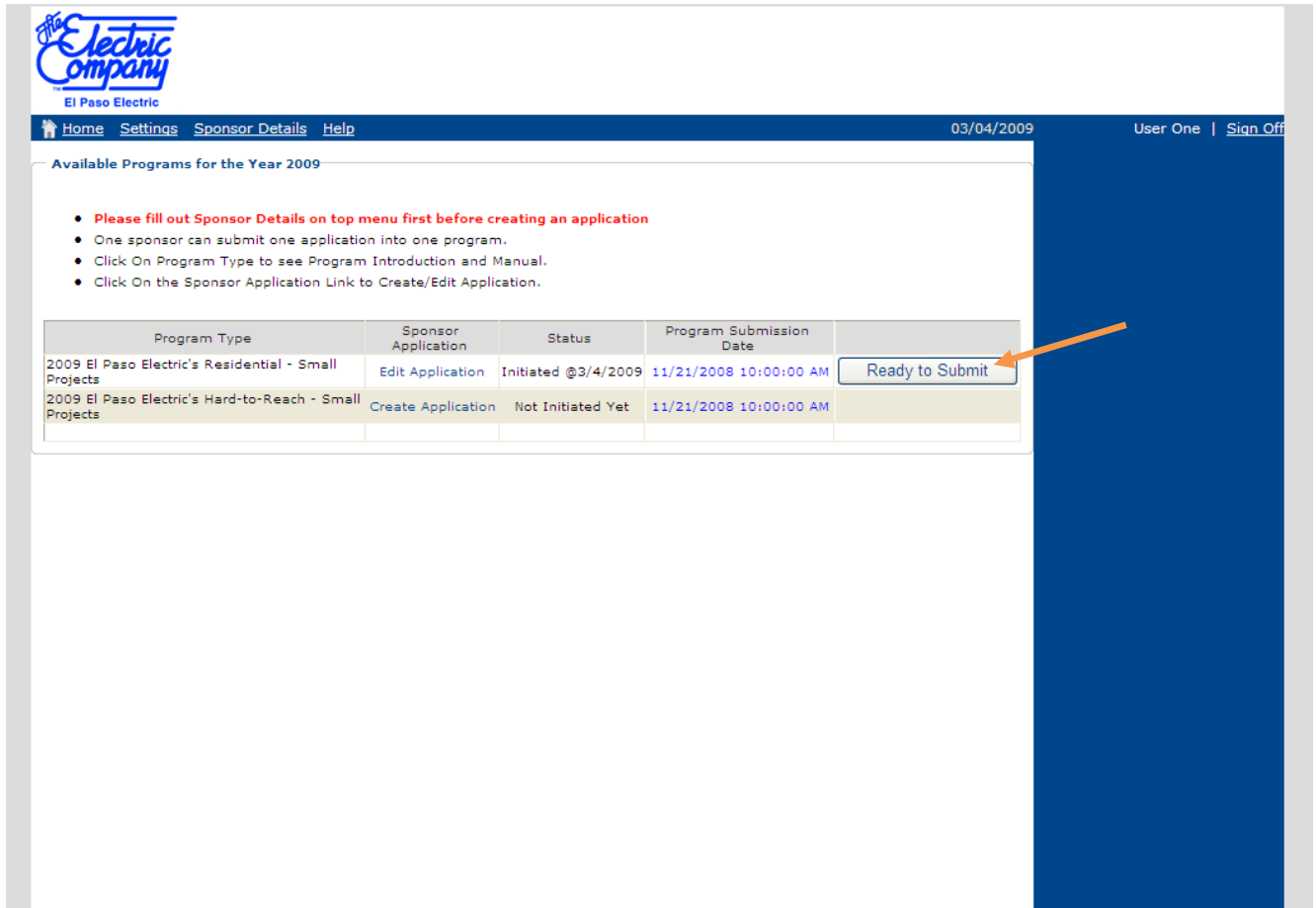
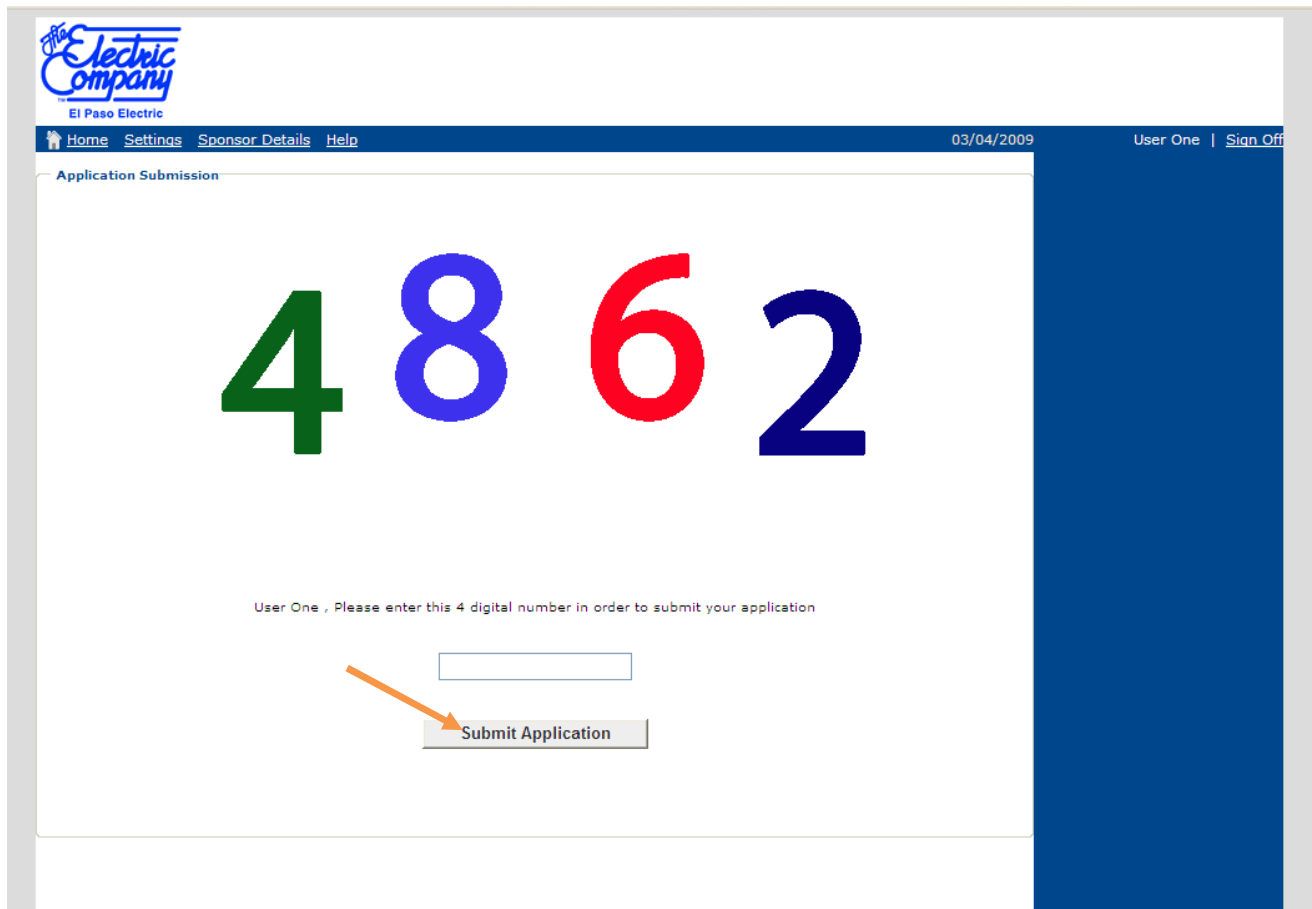


Figure 25: Submit an Application

1. Refresh your screen (F5) when the clock passed the designated submit time.
2. A 4-digit number will appear after refreshing after the designated submit time.
3. Enter the 4-digit number in the box below in the order it appears on the screen.
4. With the number entered correctly, click on the *Submit Application* button.



IMPLEMENTATION PROCESS

Figure 26: Beginning the Implementation Process

- On the Home Screen, click on ***Implement Application***.
- This will take you to the Implementation Page.

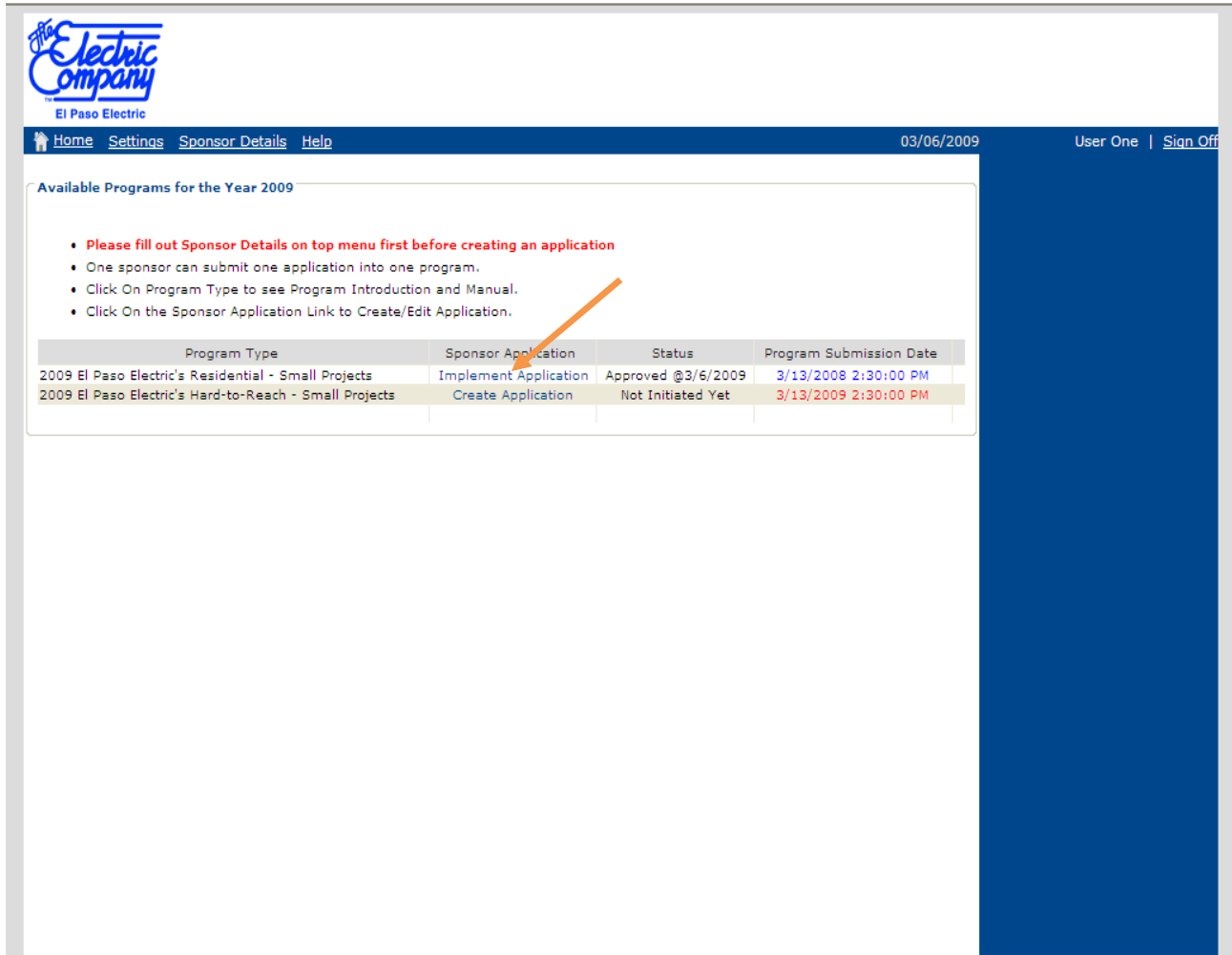


Figure 27: Implementation Page

- After clicking *Implement Application* from Figure 4, you will be automatically taken to the Implementation page. Appearing horizontally along the grey bar near the top of the screen are four options:
 - **Application** – provides a summary of your submitted application.
 - **Contract Reservation** – provides a summary of your reservation history and indicates the remaining program funds available.
 - **Implementation** - allows you to enter and review customer and installation data.
 - **Invoices** – allows you to submit and review an invoice.

- Appearing vertically down the right side of the screen is the Implementation menu, which includes three options:
 - **Review Work Schedule** – the user enters projected installation dates in order for CenterPoint to schedule a pre-inspection.
 - **Review Customer Info** – customers can be added, edited and reviewed.
 - **Review Installation Info** – installations can be added, edited and reviewed.

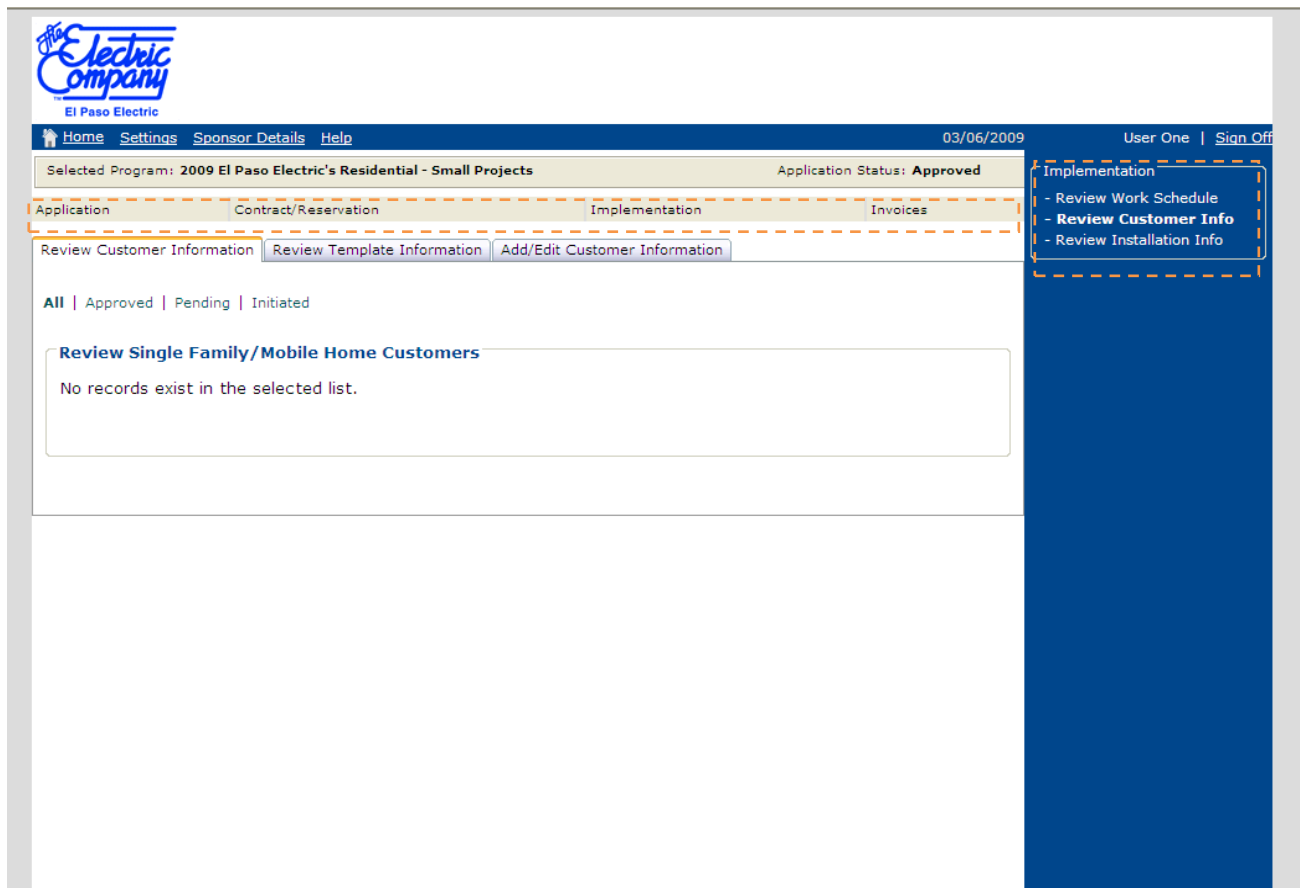


Figure 28: Make a Reservation

- Click on the **Contract / Reservation** tab.
- Fill in the **New Incentive Amount**. This is the amount you wish to reserve.
- Type the 4-digit number that appears in the image on the right.
- Click on the **Request New Incentive** button.
- The chart above will be updated with the new incentive amount. The status will be **Open**.

The screenshot shows the El Paso Electric web application interface. At the top left is the El Paso Electric logo. The navigation bar includes Home, Settings, Sponsor Details, and Help. The date 03/06/2009 is displayed. The selected program is '2009 El Paso Electric's Residential - Small Projects' with an application status of 'Approved'. The 'Contract/Reservation' tab is selected, showing program budget details: Program Budget: \$149,576.00, Total Funds Reserved: \$5,000.00 (approximate), and Program Funds Available: \$144,576.00 (approximate). Below this is a 'Contract / Reservation History' table with one entry: Contract Requested Date: 2/25/2009 1:18:18 AM, Incentive Requested: \$0.00, Incentive Approved: \$0.00, Incentive Used: \$0.00, Reservation Due Date: 04/11/2009, Status: Pending. The 'New Reservation' section contains two input fields: 'New Incentive Amount' with the value 5000 and 'Please input this 4-digit number' with the value 0851. A 'Request New Incentive' button is located below the input fields. A yellow box highlights the number 0851, with an arrow pointing to it from the right. Another arrow points to the 'Contract/Reservation' tab.

Figure 29: Work Schedule

The Work Schedule allows El Paso Electric to know in advance when work will be performed at a customer site so a pre-inspection can be scheduled and conducted.

- To enter Work Schedule information click **Review Work Schedule** from the right side Implementation menu.
- Select the **Add/Edit Work Schedule Detail** tab and fill out all fields in the form. When the form is complete click on the **Save Work Schedule Information** button at the bottom of the page.
- Fill out a work schedule for each customer site.

Select the **Review Work Schedule List** tab to review all work schedules that have been entered.

The screenshot displays the El Paso Electric web application interface. At the top, the navigation bar includes 'Home', 'Settings', 'Sponsor Details', and 'Help'. The selected program is '2009 El Paso Electric's Residential - Small Projects' and the application status is 'Approved'. The date is 03/09/2009, and the user is 'User One'.

The main content area shows a tabbed interface with 'Review Work Schedule List' and 'Add/Edit Work Schedule Detail'. The 'Add/Edit Work Schedule Detail' tab is active, showing a form with the following fields:

- Premise Number:
- Meter Number:
- Customer First Name: *
- Customer Last Name: *
- Phone 1: *
- Phone 2:
- Email:
- Address: *
- Apt#:
- City / State / Zip: * / TX * / *
- Heating Type: Gas * (dropdown menu)

Below these fields is a section titled 'Work Schedule Information' with the following fields:

- Contact Person Name: *
- Contact Person Phone: *
- Work Schedule Start Date:
- Work Schedule End Date:
- Time the crew will be onsite:
- Sponsor Notes:

At the bottom of the form, there are three buttons: 'Add New Work Schedule', 'Save Work Schedule Information', and 'Cancel the work'. On the right side, a vertical menu highlights the 'Review Work Schedule' option, with sub-options for 'Review Customer Info' and 'Review Installation Info'.

Figure 30: Add / Edit Customer Information

- Select **Review Customer Info** from the Implementation menu on the right side of the page.
- Click on the **Add/Edit Customer Information** tab.
- Fill out all of the information in the form.
- *Note: If you don't know the premise number, then when you fill in the address information click on **Lookup**. This will fill in the premise number for that address.
- Once all of the information is filled out, click **Save** to save the customer information.
- Now click on **Send Approval Request**. This will check the database to see if the customer you are trying to add is already in it. If it is not in the database, then the customer is automatically approved. If it is in the database, the customer will be pending until approved by the project manager.

The screenshot displays the 'Add/Edit Customer Information' form within a web application. The top navigation bar includes 'Home', 'Settings', 'Sponsor Details', and 'Help'. The selected program is '2009 El Paso Electric's Residential - Small Projects' with an application status of 'Approved'. The 'Implementation' menu on the right is expanded, showing 'Review Customer Info' as the active option. The form itself is divided into several sections: 'Customers Info' with fields for Status (Initiated), Group (Single Family, Multi Family, Mobile Home), Premise Number (TX003000009), Meter Number, Customer First/Last Name, Phone 1/2, Email, Address (6131 WESTSIDE DR), Apt#, City/State/Zip (EL PASO, TX, 79932), County (EL PASO), and Heating Type (Gas). A 'Lookup' button is highlighted with an orange arrow. The 'Installations' section on the right lists options like (AC) Air Conditioning, (DH) Water Heater Measures, (FI) Floor Insulation, (IN) Infiltration, (PH) Package Heat Pump, and (WI) Wall Insulation. At the bottom, there are buttons for 'Add New', 'Save', 'Send Approval Request', and 'Remove'.

Figure 31: Adding a Multi-Family Customer

- When adding a Multi-Family customer select the Multi-Family Group ID and three additional fields will appear - Template Name, Work Units, and Incentive Estimated.
- Along with all other required information, enter a Template Name, the number of Work Units, and the estimated incentive. Then click *Save*.
- You will be able to enter installations for this Multi-Family customer site using the Multi-Family Block Installations feature. This feature allows you to enter multiple installations for a block of customers at one time.

The screenshot displays a web application interface for adding a Multi-Family customer. At the top, it shows the 'Selected Program: 2009 El Paso Electric's Residential - Small Projects' and 'Application Status: Approved'. Below this, there are tabs for 'Application', 'Contract/Reservation', 'Implementation', and 'Invoices'. The 'Implementation' tab is active, and the 'Add/Edit Customer Information' sub-tab is selected. The main content area is titled 'Customers Info' and contains several sections:

- Status:** A dropdown menu is set to 'Initiated'.
- Group:** Radio buttons are present for 'Single Family', 'Multi Family' (selected), and 'Mobile Home'. An orange arrow points to the 'Multi Family' option.
- Premise Number:** A text input field with a 'Lookup' button.
- Meter Number:** A text input field with a 'Lookup' button.
- Template Name:** A text input field with an orange arrow pointing to it.
- Work Units:** A text input field with an orange arrow pointing to it.
- Incentive Estimated:** A text input field with an orange arrow pointing to it.
- Phone 1:** A text input field with an asterisk.
- Phone 2:** A text input field.
- Email:** A text input field.
- Address:** A text input field with an asterisk.
- Apt#:** A text input field.
- City / State / Zip:** A text input field with an asterisk, followed by a state dropdown menu (set to 'TX') with an asterisk, and another text input field with an asterisk.
- County:** A text input field with an asterisk.
- Heating Type:** A dropdown menu set to 'Gas' with an asterisk.
- Sponsor Notes:** A large text area with a scroll bar.

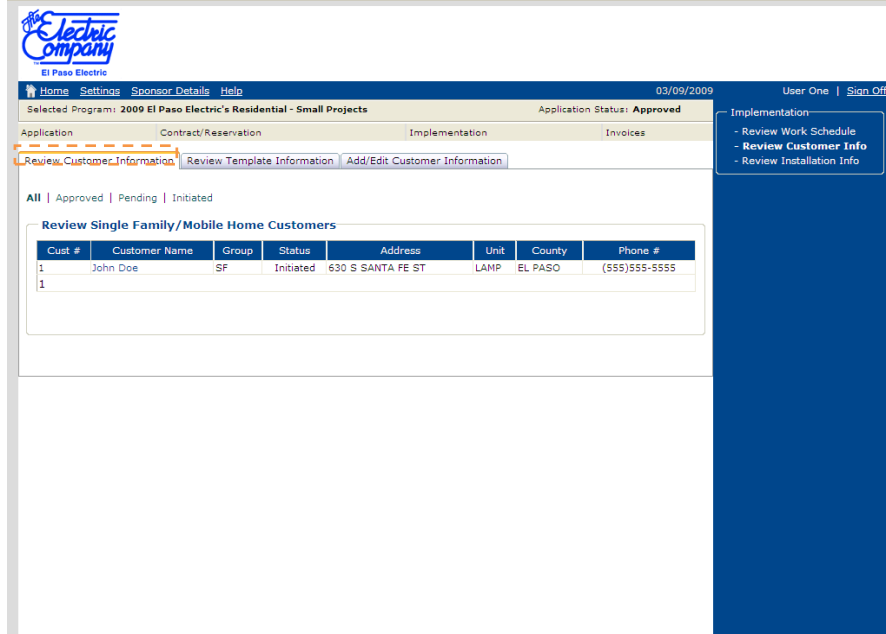
On the right side, there is an 'Installations' section with a list of checkboxes for various services: (AC) Air Conditioning, (DH) Water Heater Measures, (FI) Floor Insulation, (IN) Infiltration, (PH) Package Heat Pump, and (WI) Wall Insulation.

A blue sidebar on the right contains the following navigation links:

- Implementation
- Review Work Schedule
- Review Customer Info
- Review Installation Info

Figure 32: Review Customers

- All Single Family and Mobile Home customers entered for the project sponsor will be listed on the *Review Customer Information* tab.
- Customers may be sorted based on All, Approved, Pending or Initiated Status.



- All Multi-Family customers entered for the project sponsor will be listed on the *Review Template Information* page.

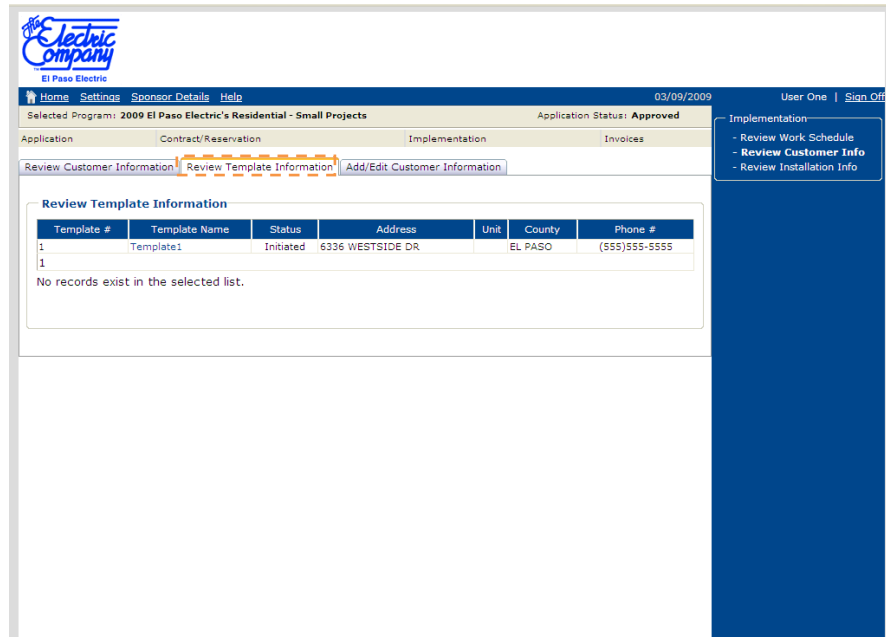


Figure 33: Add Single Family or Mobile Home Installation

- To add an installation for a Single Family or Mobile Home customer select **Review Installation Info** from the right side Implementation menu.

The screenshot shows the 'Add Installation' form in the El Paso Electric web application. The 'Add Installation Information' tab is active. The table below contains two entries:

#	Customer Name	Address	City	County	Zip	Group	Heating Type	Installation
2	a a	6393 WESTSIDE DR	EL PASO	EL PASO	79932	SF	Gas	-No Installation Types-
1	John Doe	630 S SANTA FE ST	EL PASO	EL PASO	79901	SF	Gas	-Installation Types- Air Conditioning Floor Insulation Infiltration

An orange arrow points to the 'Add' button next to the 'John Doe' entry. The right-hand side of the interface shows the 'Implementation' menu with 'Review Installation Info' selected.

Enter the measure that has been installed:

- To the right of the customer name, use the pull-down menu to select the type of measure to be installed, then press the **Add** button.
- Fill out all of the required information on the form. If you need clarification regarding installation standards or in determining how deemed savings are calculated, please refer first to the deemed savings appendices in your program manual.
- Once all required information has been filled out click the **Save New Installation** button. Avoid pressing the button twice if response time is slow.
- If this particular customer has more than one installation, repeat this process for each measure by going back to the **Review Installation Page**.

Figure 34: Add Multi-Family Installations

- To add installations for a Multi-Family customer site select **Review Installation Info** from the right side Implementation menu and then select **Add Multi-Family Block Installations**.
- Select the template by clicking the radio button next to the template name.
- Check the measures that will be installed at this customer site and then press **Create blocks of Multi-Family Installations**.

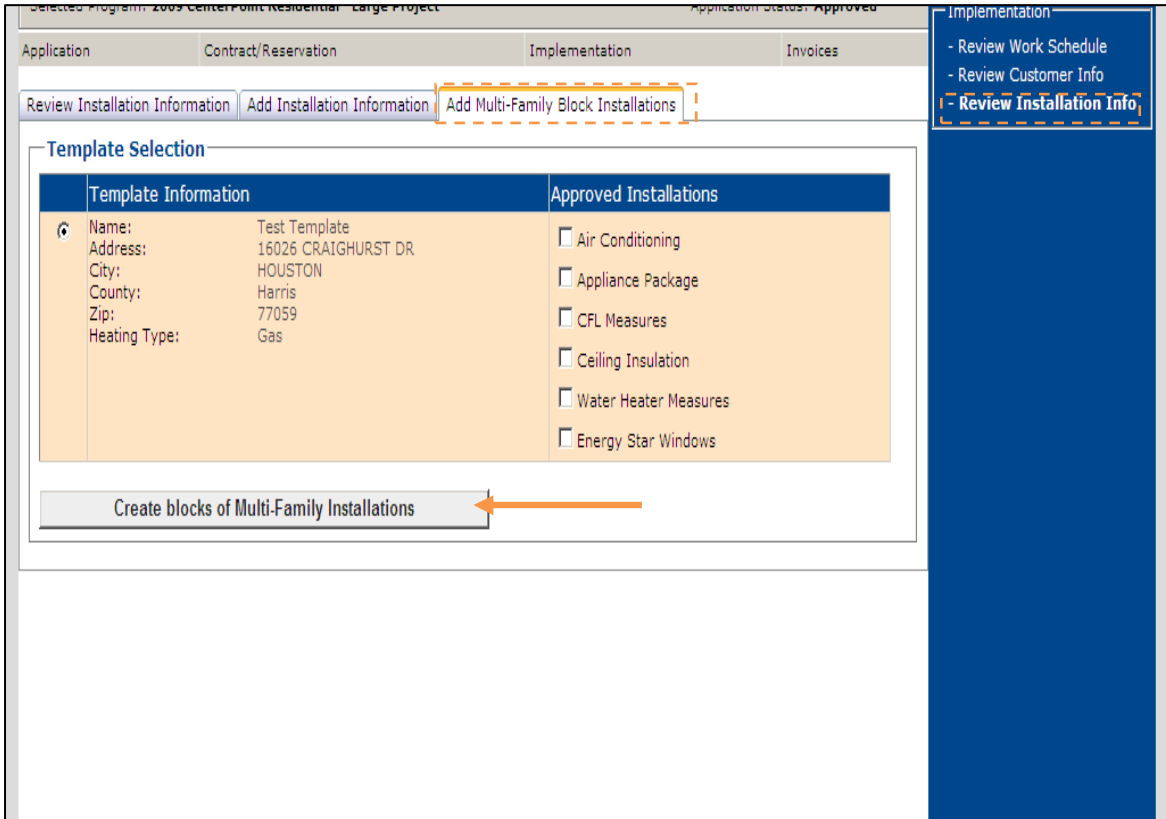


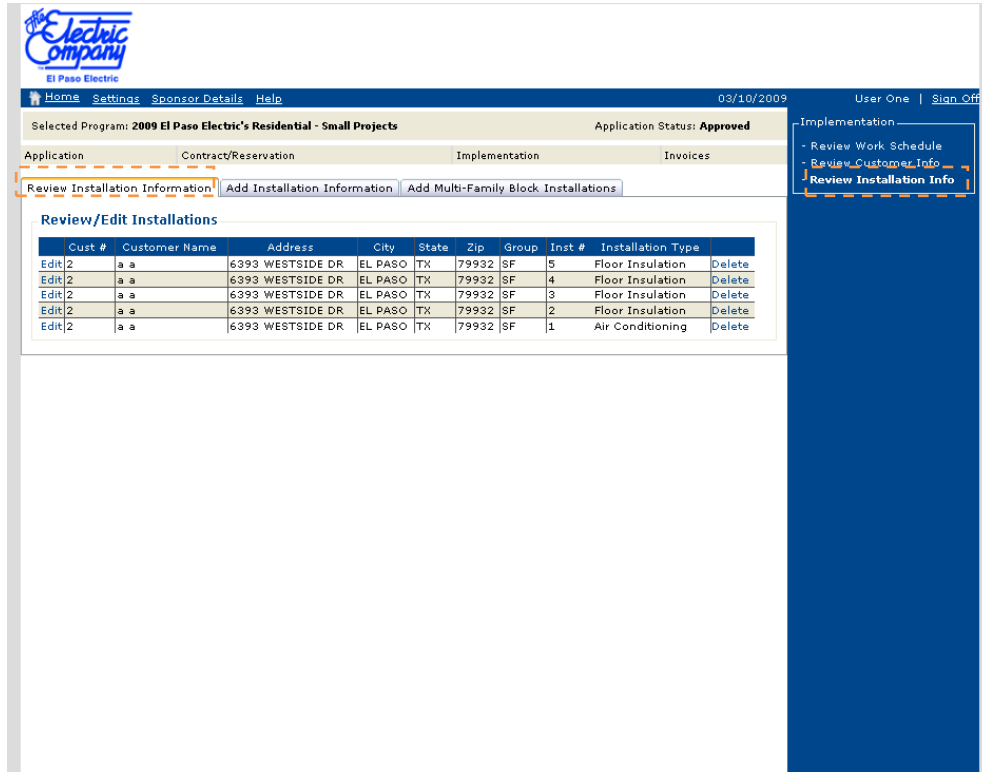
Figure 35: Add Multi-Family Customers

- Enter the customer information for each customer that will receive installations at the Multi-Family site.
- Once all required information has been entered for the customer press **Save**.
- To enter another customer press **Add New Customer**.

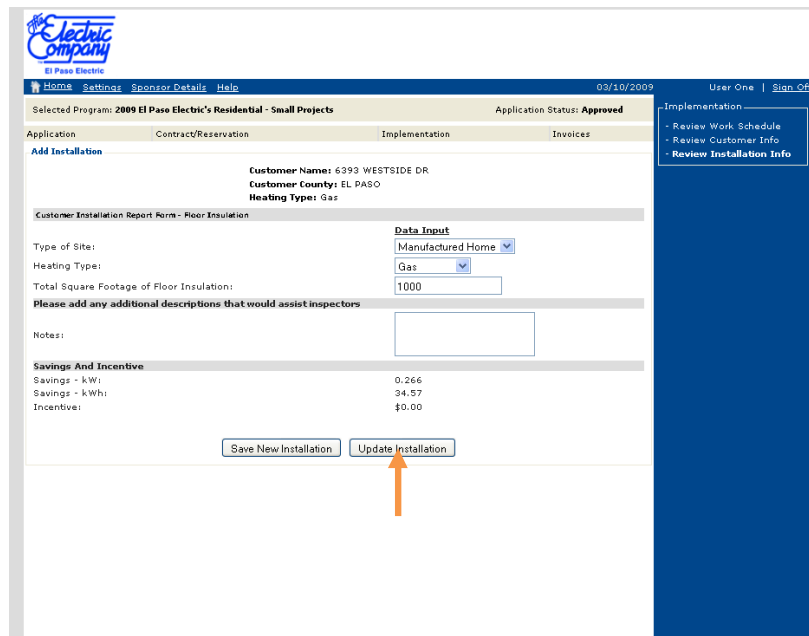
The screenshot displays a software interface for adding multi-family customers. At the top, there are four tabs: 'Application', 'Contract/Reservation', 'Implementation', and 'Invoices'. Below these is a 'Customer' tab. The main content area is divided into two sections: 'Template Details' and 'Customer Details'. The 'Template Details' section includes fields for 'Template Name' (Test Template), 'Address' (16026 CRAIGHURST DR), 'County' (Harris), 'Account No.' (1008901017631618155100), 'City/Zip' (HOUSTON / 77059), and 'Heating Type' (Gas). The 'Customer Details' section includes fields for 'Unit #', 'First Name', 'Last Name', 'Phone #', and 'Email'. Below these fields are three buttons: 'Save', 'Add New Customer', and 'Back to Installation'. Two orange arrows point to the 'Save' and 'Add New Customer' buttons. On the right side, there is a blue sidebar with three links: '- Review Work Schedule', '- Review Customer Info', and '- Review Installation Info'.

Figure 36: Review and Edit Installations

- To review, edit, or delete your installations select **Review Installation Info** from the right side Implementation menu and then select the **Review Installation Information** tab. All added installations will appear on this page.



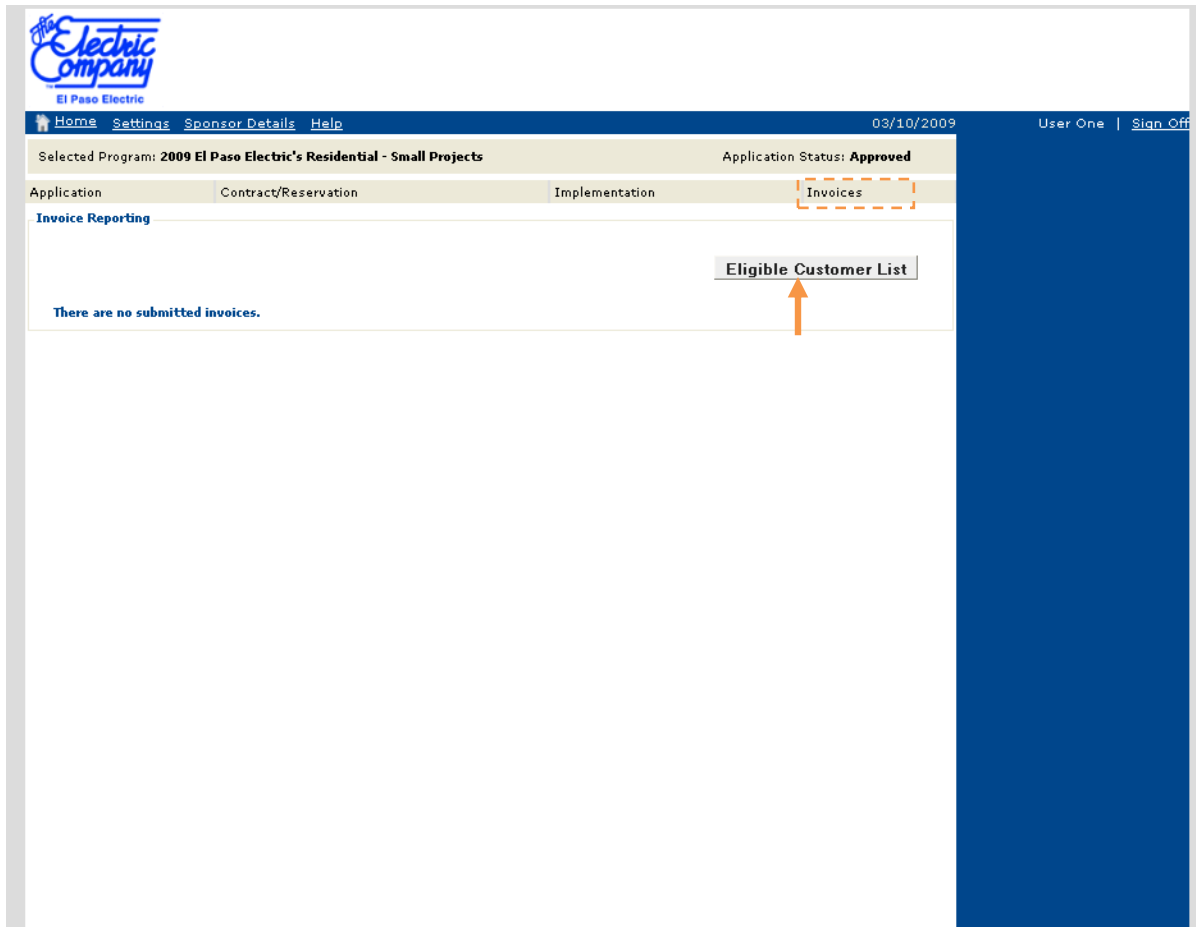
- If changes need to be made for a particular installation, click the **Edit** link beside the measure. Make the necessary changes and then press **Update Installation**.



INVOICE PROCESS

Figure 37: Invoice Menu

- To process an invoice choose the *Invoices* link from the top menu.



- To process and submit an invoice, press *Eligible Customer List*.

Figure 38: Submit Invoice

- All customers with installations entered in the *EnerTrek* database will display in the Eligible Customers List.
- To submit an invoice, enter the Invoice Number and select each customer to be included on the invoice, then click *Submit Invoice*.

Application Contract/Reservation Implementation Invoices

Summary
Reservation Used: \$0.00
Available: \$20,000.00

Eligible Customers List

Invoice Number: **Submit Invoice**

Check to Submit	Customer #	Customer	Address	Group	Install #	Installation Type	Request KW	Request KWh	Request Incentive
<input type="checkbox"/>	1526	John Doe	3232 DIXIE DR	SF	2966	AC: Air Conditioning	0.54	1,176.00	\$445.74
					2967	AP: Appliance Package	0.14	1,067.00	\$133.40
					2968	DH: Water Heater Measures	0.01	140.00	\$16.45
<input type="checkbox"/>	1527	Frank Small	16026 CRAIGHURST DR	MH	2969	AC: Air Conditioning	0.40	766.00	\$313.36
					2970	CF: CFL Measures	0.22	1,385.50	\$137.29
					2971	WN: Energy Star Windows	1.98	3,143.25	\$810.74
Total:							3.29	7,677.75	\$1,856.98

Figure 39: Review Invoice

- To review submitted invoices choose the **Invoices** link at the top of the menu. A list of all submitted invoices will display.
- The status of the invoice will appear under the Status column.

Invoice #	Month	Status	Submitted KW	Submitted KWh	Submitted Incentive	Submitted Date	Adjusted KW	Adjusted KWh	Adjusted Incentive	Paid Incentive	Paid Date
3-09	March	Submitted	3.29	7,677.75	\$1,856.98	3/6/2009 1:06:38 PM	0.00	0.00	\$0.00	\$0.00	None
Total:			3.29	7,677.75	\$1,856.98		0.00	0.00	\$0.00	\$0.00	

- To review an invoice in greater detail, click the Invoice Number and a detailed summary of the invoice will appear.