

Project Sponsor User Guide – 2010 Commercial EnerTrek®

Introduction

The User Guide provides Project Sponsors participating in AEP Texas Central Company Commercial Standard Offer Program with guidelines on completing the Applications, Installation and Savings Reports. Specific screen shots and directions are given for the majority of form-types that will be seen within *EnerTrek®*, the online database tracking system. Not all forms are described here, although the methods described apply throughout.

When working with AEP Texas Central Company 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.
- 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.
- Although it would be a rare occurrence, if the Application is submitted more than once, the last one submitted will be the only one accepted and assigned a timestamp for the order of submission.
- **Please download all equipment survey forms from the 2010 *EnerTrek®* online tracking system or from the AEP Texas Central Company Commercial SOP website. The 2009 forms will not work in the 2010 database system.**

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

Phase One – Register as a New User

To access the Application Forms, go to AEP Texas Central Company Commercial SOP Home Page, <http://aepefficiency.com/cisop/applications/TexasCentralForms.htm>

- Choose the link, *2010 AEP Texas Central Company Commercial SOP Project Sponsor Forms*.

Visit the AEPEfficiency.com main page for links to more AEP programs.

[Home](#) [Index](#)

Introduction	Participation Process	News & Updates	Program Downloads	Application / Reports	Contact
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Project Sponsor Forms

AEP SWEPSCO Forms	AEP Texas Central Company Project Sponsor Forms To access forms for AEP Texas Central Company choose from the links below: <ul style="list-style-type: none">■ 2009 AEP Texas Central Company Commercial SOP Project Sponsor Forms
AEP Texas Central Company Forms	
AEP Texas North Company Forms	

[Home](#) | [Index](#)

[Introduction](#) | [Participation Process](#) | [News & Updates](#)
[Program Downloads](#) | [Project Sponsor Forms](#) | [Contact](#)

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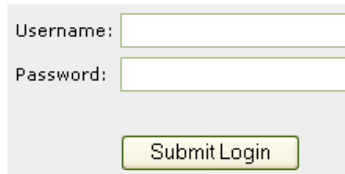
Figure 1: Commercial & Industrial SOP Home Page

-
- You must first register as a user before you can log into the database system. Choose *First-time users click here.*

Figure 2: First-Time Users

[First time users click here.](#)

Returning users enter **Username** and **Password** :



A login form with a light gray background. It contains two input fields: 'Username:' and 'Password:'. Below the fields is a yellow button with the text 'Submit Login'.

[Forgot Username/Password ?](#)

Please continue to check the www.aepefficiency.com website for updates on the submittal date and time.

-
- Enter your Company's Federal Tax ID number. This number will be a key identifier in the system for each Project Sponsor. If you do not have a Federal Tax ID number, please input your Social Security #.

Figure 3: Federal Tax ID

The screenshot shows a form with a label 'Federal Tax ID:' followed by a text input field containing '12-'. To the right of the input field are two radio buttons: 'TAX ID' (which is selected) and 'SSN'. Below the input field is a 'Submit' button.

Valid format for TAX ID is 12-3456789 or leave out dash to auto-format

- Fill in the required fields and press *Accept Sponsor Information*.

Figure 4: Register as a New User – Sponsor Information

Sponsor Information
Federal Tax ID / SSN : 12-3123123
Company Name : *
Parent Company :
Parent Company's Federal Tax ID Number :
Contact First Name : *
Contact Last Name : *
Contact Title : *
Contact Address 1 : *
Contact Address 2 :
Contact City/State/Zip : TX
 *
Contact Phone Number : *
Contact Fax Number :
Contact Email Address : *
Work Type :
 Lighting Contractor
 Lighting Distributor
 HVAC Contractor
 HVAC Distributor
 ESCO
 Engineering Company
 MEP Contractor
 Self Sponsor
 Other

* Indicates required field

-
- Fill in the required fields and press ***Accept User Information***.
 - Be sure to make note of your username and password for future reference. You will be required to enter your username and password each time you log into the system.
 - The username and password must be at least 4 characters.
 - The username and password are not case-sensitive.
 - Multiple users using the same username and password may be logged into the system at the same time. *Please keep in mind, on opening day if the Initial Application for a project is submitted more than once, the last one submitted will be the only one saved in the system.*

Figure 5: Register as a New User – User Information

User Information	
Federal Tax ID / SSN	: 12-3123123
User First Name	: <input type="text"/>
User Last Name	: <input type="text"/>
Desired Username	: <input type="text"/>
Password	: <input type="text"/>
Password (again)	: <input type="text"/>
Contact Phone	: <input type="text"/>
Contact Email	: <input type="text"/>
<input checked="" type="checkbox"/> Check here if you would like to receive email updates	
<input type="button" value="Accept User Information"/> <input type="button" value="Undo"/>	

* All fields required

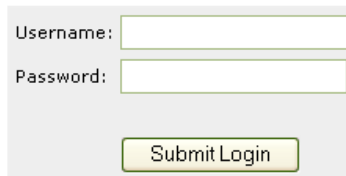
* Desired Username and Password must be at least 4 characters. The username and password are not case-sensitive

-
- Log in using the username and password that was entered in your registration form and press enter or press **Submit Login**.

Figure 6: Login Screen

[First time users click here.](#)

Returning users enter **Username** and **Password** :



A login form with a light gray background. It contains two text input fields: the first is labeled 'Username:' and the second is labeled 'Password:'. Below the input fields is a yellow button with the text 'Submit Login'.

[Forgot Username/Password ?](#)

Please continue to check the www.aepefficiency.com website for updates on the submittal date and time.

Phase Two – Initial Application

- In order to submit an Initial Application the Sponsor will need to follow three steps:

Step 1: Fill out the Qualification Set by clicking on the “Qualification” link on the top menu on the Projects main page.

Step 2: Enter the Project Information by clicking “New Project” button on the blue bar.

Step 3: When the Project Information is complete, submit the Application.

Figure 7: Main Menu

[Profile](#) | [Qualification](#) | [Users](#) | **[Projects](#)** | [Message](#) | [Downloads](#) | [Report](#)

- Sponsor: Testing Company
- User : John D.

Projects

- Maximum Sponsor Limit	: \$105,397.00
- Minimum Project Size (kW)	: 1 kW
- Total incentive reserved for this Sponsor :	\$0.00

ID	Project	Estimated kW Savings	Estimated kWh Savings	Estimated Incentive	Status	Final App. Due Date	<input type="button" value="New Project"/>
There is no data available							

Please follow these steps to create new Application

1. Click on **Qualification** to complete the Qualification set
2. Click on **New Project** to fill in information about the project and measures you plan to install
3. Click on **Submit** to submit the application

Step 1: Fill out the Qualification Set

- From the Main Menu page select *Qualification* from the top menu bar.
- Select *New* to enter a new set of Qualifications.

Figure 8: Enter New Qualification Set

Profile | **Qualification** | Users | Projects | Message | Downloads | Report

- Sponsor: Testing Company
- User : John D.

Qualification

ID	Name	
2	testing	<input type="button" value="Edit/View"/>

- Choose a name for the Qualification Set and enter the required information into each text box and choose *Accept Company Qualifications Documentation* when you are finished.
- You will receive a message indicating your Qualification Set has been entered successfully.
- Repeat this step for each set of Qualifications you would like to enter.

Figure 9: New Qualification Information

Qualification > New Qualification

Qualification Documentation

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.

Please provide the following information and submit required hardcopy information within ten days of Internet Application:

Qualification Name

1. Statement of technical and managerial capabilities and experience (500 word maximum):

2. Evidence that Project Sponsor and its subcontractors possess all applicable licenses. Evidence includes a list of all applicable licenses, issuing agencies and license numbers.

3. 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.

3.a. Reference 1:

3.b. Reference 2:

Step 2: Enter Project Information

- Choose **Projects** from the top menu bar.
- Select **New Project** from the Main Menu page.

Figure 10: Main Menu

[Profile](#) | [Qualification](#) | [Users](#) | **[Projects](#)** | [Message](#) | [Downloads](#) | [Report](#)

- Sponsor: Testing Company
- User : John D.

Projects

- Maximum Sponsor Limit : \$105,397.00
- Minimum Project Size (kW) : 1 kW
- Total incentive reserved for this Sponsor : \$0.00

ID	Project	Estimated kW Savings	Estimated kWh Savings	Estimated incentive	Status	Final App. Due Date	<input type="button" value="New Project"/>
There is no data available							

Please follow these steps to create new Application

1. Click on **Qualification** to complete the Qualification set
2. Click on **New Project** to fill in information about the project and measures you plan to install
3. Click on **Submit** to submit the application

-
- Enter the Project Name and choose *Save*.

Figure 11: Project Name

[Profile](#) | [Qualification](#) | [Users](#) | **[Projects](#)** | [Message](#) | [Downloads](#) | [Report](#)

- Sponsor: Testing Company
- User : John D.

[Projects](#) > [New Project](#)

Project Information

Project Name :

-
- Each section of the Project Information form will need to be completed before the Application can be submitted. After entering the information for each section you can either choose the **Save** button located to the right of each section or you can use the **Update Project Information** button found at the end of the form.
 - Once a section has been completed and saved to the database, a check will appear in the check box beside the section title.
 - When all sections have been completed the **Submit** button will become active if already past the day and time the program opened for application submission.
 - At the beginning of each program year, the submit button will not be active until the set date and time the program is scheduled to open.

Project Information: This section includes the Project Name previously defined, Project Type and a space for additional comments. Click on the radio button for the appropriate Project Type - New Construction, Retrofit or Combination.

Project Description: Provide a description of the project, including energy efficiency measures and the activities that will be performed by the project sponsor. If you are providing a hardcopy of the project description, click “yes” to notify the program administrator.

Site Information: You will need to identify each customer site you intend to install measures and input the associated estimated peak demand and energy savings.

Project Savings Calculation: Define the type of saving assumptions you’ll use for the project by checking the appropriate boxes. Additionally, you may enter the assumptions and/or formulas used to calculate the estimated energy and peak demand savings.

Estimated Schedule: Enter the Project Estimated Start Date and Completion Date. When you click in either the Start Date or Completion Date box, a calendar will appear. Choose the appropriated dates. The text box can be used to further describe the project schedule.

Hint – There may be less chance you’ll forget to complete a form if you first fill out all sections except the Site Information, then come back to the Site Information which contains all the specific Customer and Measure Information.

Figure 12: Project Information

Projects > Project Information

Testing Project 123		Contract #	none
Project ID #	2	Application status	Project Application, not submitted
Project Application	Complete	Submittal Date	None
• Project Information	<input type="checkbox"/>	Approved Date	None
• Project Description	<input type="checkbox"/>	Estimated Savings	0.00 kW 0 kWh
• Site Information	<input type="checkbox"/>	Estimated incentive for this project	\$0.00
• Savings Calculation	<input type="checkbox"/>	Approved incentive	\$0.00
• Estimated Schedule	<input type="checkbox"/>	Message	
• Application Agreement	<input type="checkbox"/>		
• Qualification Set	<input checked="" type="checkbox"/>		
- testing			
• Sponsor Contact	<input checked="" type="checkbox"/>		
- John D. (512-372-8877)			

Project Information TOP

Project Name :

Comments :

Project Type : New Construction Retrofit Combination

Contact Person :

Project Description TOP

Provide a basic description of the project, including energy efficiency measures and the activities that will be performed by the project sponsor

A hardcopy of description ? Yes No

Project Saving Calculation TOP

Check all that apply :

Stipulated deemed savings

Simplified M&V

Full M&V

A hardcopy of Calculation ? Yes No

Project Estimate Schedule TOP

- Choose *Site Information* or the *Measures* tab

Figure 13: Site Information

Projects > Project Information

Testing Project 123

Project ID #	2	Contract #	none
Project Application	Complete	Application status	Project Application, not submitted
• Project Information	<input type="checkbox"/>	Submittal Date	None
• Project Description	<input type="checkbox"/>	Approved Date	None
• Site Information	<input type="checkbox"/>	Estimated Savings	0,00 kW 0 kWh
• Savings Calculation	<input type="checkbox"/>	Estimated incentive for this project	\$0.00
• Estimated Schedule	<input type="checkbox"/>	Approved incentive	\$0.00
• Application Agreement	<input type="checkbox"/>	Message	<div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>
• Qualification Set	<input checked="" type="checkbox"/>	<input type="button" value="Submit"/> <input type="button" value="Duplicate"/> <input type="button" value="Delete"/>	
- testing			
• Sponsor Contact	<input checked="" type="checkbox"/>		
- John D. (512-372-8877)			

Project Info Measures Documents Spreadsheets Agreement Qualification Summary

ID	Customer	Lighting Savings		non-Lighting Savings		New Customer
		kW	kWh	kW	kWh	
There is no data available						
Total		0.00	0	0.00	0	
Original Requested Incentive: \$0.00						
Note : No Lighting Adjustment						
No Load Factor Cap Adjustment						
Total Saving, 0.00 kW, less than minimum project size, 1 kW.						
Estimated Deposit: \$0.00						

➤ Press the *New Customer* button.

Figure 14: Add New Customer

Projects > Project Information

Testing Project 123

Project ID # 2

Project Application Complete

- Project Information
- Project Description
- Site Information
- Savings Calculation
- Estimated Schedule
- Application Agreement
- Qualification Set
- testing
- Sponsor Contact
- John D. (512-372-8877)

Contract # none

Application status **Project Application, not submitted**

Submittal Date None

Approved Date None

Estimated Savings 0.00 kW 0 kWh

Estimated incentive for this project \$0.00

Approved incentive \$0.00

Message

Project Info
Measures
Documents
Spreadsheets
Agreement
Qualification
Summary

ID	Customer	Lighting Savings		non-Lighting Savings		New Customer
		kW	kWh	kW	kWh	
There is no data available						
Total		0.00	0	0.00	0	
Original Requested Incentive: \$0.00						
Note : No Lighting Adjustment						
No Load Factor Cap Adjustment						
Total Saving, 0.00 kW, less than minimum project size, 1 kW.						
Estimated Deposit: \$0.00						

- Enter all required information into each field and choose *Save*.
- The ESI ID Number will always have the following format. It is 17 numbers in length.
- AEP Texas Central Company requires a valid ESI ID number to verify the property is within their service area.
- A valid ESI ID number will populate the form with the customer address, city, and zip code. This information cannot be changed unless the ESI ID number is changed. Please fill in the rest of the information in the form.

Figure 15: Enter Customer Information

To Verify as AEP Texas Central Company Customer

ESI ID Number:

Customer General Information

Customer Company Name:

Site Contact Name (First):

Site Contact Name (Last):

Site Contact Title:

Site Street Address:

City/State/Zip: TX

County: None

Phone Number:

Fax Number:

email:

Preinstallation Condition

Building Type: Others (please specify)

(for "other," please specify)

Building Operating Schedule:
(for example, 7/24, M-F 8-5)

Building Floor Area:
(sq ft or "n/a")

- Select the *Edit/View Customer and Measures* link.

Figure 16: Edit/View Customer and Measures

Project Info		Measures	Documents	Spreadsheets	Agreement	Qualification	Summary
ID	Customer	Lighting Savings		non-Lighting Savings		New Customer	
		kW	kWh	kW	kWh		
2	Walget	0.00	0	0.00	0	Edit/View Customer and Measures	
Total		0.00	0	0.00	0		
Original Requested Incentive: \$0.00							
Note : No Lighting Adjustment No Load Factor Cap Adjustment Total Saving, 0.00 kW, less than minimum project size, 1 kW. Estimated Deposit: \$0.00							

- Select the *New Measure* button.

Figure 17: Add New Measure

To Verify as AEP Texas Central Company Customer

ESI ID Number:

Customer General Information

Customer Company Name:

Site Contact Name (First):

Site Contact Name (Last):

Site Contact Title:

Site Street Address:

City/State/Zip: TX

County:

Phone Number:

Fax Number:

email:

Preinstallation Condition

Building Type: (for "other," please specify)

Building Operating Schedule: (for example, 7/24, M-F 8-5)

Building Floor Area: (sq ft or "n/a")

Customer : **Walget**

ID	Measures	Survey Forms	Uploaded Date	Total Saving		New Measure
				kW	kWh	
There is no data available						
Total		Non-Lighting		0.00	0	
		Lighting		0.00	0	

- Enter the Proposed Measure type that will be installed at the host customer site.
- If the measure is lighting, check the lighting measure box.
- In the Initial Application (IA), you have the option of manually inputting the estimated kW and kWh savings attributed to the measure being installed or you may upload one of the approved equipment survey spreadsheets provided under the Downloads section from the main menu.
- In the Final Application (FA), Installation Report (IR) and the Savings Report (SR), you must upload one of the equipment surveys provided if the measure is lighting, HVAC, motors or window film. For all other measures, please upload the Other Measures Survey form.
- If you are inputting the data manually in the IA, input it and then choose *Save*. Otherwise, select the *Upload spreadsheet* button.

Figure 18: Enter Estimated Impacts

To Verify as AEP Texas Central Company Customer

ESI ID Number:

Customer General Information

Customer Company Name:

Site Contact Name (First):

Site Contact Name (Last):

Site Contact Title:

Site Street Address:

City/State/Zip:

County:

Phone Number:

Fax Number:

email:

Preinstallation Condition

Building Type: (for "other," please specify)

Building Operating Schedule: (for example, 7/24, M-F 8-5)

Building Floor Area: (sq ft or "n/a")

Customer : **Walget**

ID	Measures	Survey Forms	Uploaded Date	Total Saving		New Measure
				kW	kWh	
There is no data available						
		Total		Non-Lighting	0.00	0
				Lighting	0.00	0

Customer : **Walget**

Proposed Measure:

Check here if this is a lighting measure:

Saving	
Peak Demand Saving (kW)	<input type="text" value="0"/>
Annual Electricity Saving (kWh)	<input type="text" value="0"/>

(a) Please download the revised equipment survey forms from the Download section within this database.
 (b) These spreadsheets account for power adjustment factors and calculate the interactive effects savings.
 (c) Please input the estimated **kW savings** and **kWh savings** calculated from these spreadsheets into the online form.

- The customer and measure that was just added will appear in the table along with the associated peak demand and energy savings and the calculated incentive amount.
- If the lighting cap or the load factor cap have been exceeded the adjusted incentive amount will be displayed in red below the table of measures.
- To add a new customer, choose the *New Customer* button and repeat the data entry steps.
- To edit an existing customer or measure choose *Edit/View* beside the appropriate customer.

Figure 19: Estimated Impacts Review

Projects > Project Information

Testing Project 123

Project ID #	2	Contract #	none
Project Application	Complete	Application status	Project Application, not submitted
• Project Information	<input type="checkbox"/>	Submittal Date	None
• Project Description	<input type="checkbox"/>	Approved Date	None
• Site Information	<input type="checkbox"/>	Estimated Savings	0.00 kW 0 kWh
• Savings Calculation	<input type="checkbox"/>	Estimated incentive for this project	\$0.00
• Estimated Schedule	<input type="checkbox"/>	Approved incentive	\$0.00
• Application Agreement	<input type="checkbox"/>	Message	<div style="border: 1px solid gray; height: 30px; width: 100%;"></div>
• Qualification Set	<input checked="" type="checkbox"/>	<input type="button" value="Submit"/> <input type="button" value="Duplicate"/> <input type="button" value="Delete"/>	
- testing			
• Sponsor Contact	<input checked="" type="checkbox"/>		
- John D. (512-372-8877)			

Project Info	Measures	Documents	Spreadsheets	Agreement	Qualification	Summary
--------------	----------	-----------	--------------	-----------	---------------	---------

ID	Customer	Lighting Savings		non-Lighting Savings		New Customer
		kW	kWh	kW	kWh	
2	Walget	0.00	0	0.00	0	Edit/View Customer and Measures
Total		0.00	0	0.00	0	

Original Requested Incentive: **\$0.00**

Note :
 No Lighting Adjustment
 No Load Factor Cap Adjustment
 Total Saving, 0.00 kW, less than minimum project size, 1 kW.
 Estimated Deposit: **\$0.00**

- To add another measure, choose *New Measure*.

Figure 20: Add New Measure

Project Info		Measures	Documents	Spreadsheets	Agreement	Qualification	Summary
ID	Customer	Lighting Savings		non-Lighting Savings		New Customer	
		kW	kWh	kW	kWh		
2	Walget	0.00	0	0.00	0	Edit/View Customer and Measures	
Total		0.00	0	0.00	0		

Original Requested Incentive: **\$0.00**

Note :
 No Lighting Adjustment
 No Load Factor Cap Adjustment
 Total Saving, 0.00 kW, less than minimum project size, 1 kW.
 Estimated Deposit: **\$0.00**

To Verify as AEP Texas Central Company Customer				Customer : Walget						
ESI ID Number:	10032789400005680	<input type="button" value="Lookup"/>		ID	Measures	Survey Forms	Uploaded Date	Total Saving		<input type="button" value="New Measure"/>
Customer General Information								kW	kWh	
Customer Company Name:	Walget			There is no data available						
Site Contact Name (First):	John			Total		Non-Lighting	0.00	0		
Site Contact Name (Last):	D.					Lighting	0.00	0		
Site Contact Title:	Dr.									
Site Street Address:	2917 AVENUE G									
City/State/Zip:	DAV CITY	TX	77414	Customer : Walget						

- When all the boxes have a check mark and show each section as complete, the **Submit** button will become active and the application can be submitted at program opening. Please check the AEP Texas Central Company Commercial Standard Offer Program web site <http://www.aepefficiency.com/> for the date and time the program opens. Complete applications cannot be submit before that time.

Figure 24: Ready to Submit Application

Projects > Project Information

Testing Project 123

<p>Project ID # 2</p> <p>Initial Application Complete</p> <ul style="list-style-type: none"> • Project Information <input checked="" type="checkbox"/> • Project Description <input checked="" type="checkbox"/> • Site Information <input checked="" type="checkbox"/> • Savings Calculation <input checked="" type="checkbox"/> • Estimated Schedule <input checked="" type="checkbox"/> • Qualification Set <input checked="" type="checkbox"/> - testing • Sponsor Contact <input checked="" type="checkbox"/> - John D. (512-372-8877) 	<p>Contract # none</p> <p>Application status Initial Application, not submitted</p> <p>Submittal Date None</p> <p>Approved Date None</p> <p>Estimated Savings 67.69 kW 227,928 kWh</p> <p>Estimated incentive for this project \$28,470.71</p> <p>Approved incentive \$0.00</p> <p>Message</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: right;"> <input type="button" value="Submit"/> <input type="button" value="Duplicate"/> <input type="button" value="Delete"/> </p>
---	---

Project Info | **Measures** | Documents | Spreadsheets | Agreement | Qualification | Summary

ID	Customer	Lighting Savings		non-Lighting Savings		New Customer
		kW	kWh	kW	kWh	
2	Walget	38.15	116,826	29.54	111,102	Edit/View Customer and Measures
Total		38.15	116,826	29.54	111,102	

Original Requested Incentive: **\$28,470.45**

Note :
 No Lighting Adjustment
 No Load Factor Cap Adjustment
 Estimated Deposit: **\$1,423.52**

Step 3: Submit Application

- When all required information has been entered into each section of the Project Information form choose **Update Project Information**.
- If it is after the program opening day, the **Submit** button will become active and the Initial Application is ready to submit when all check boxes are checked as complete. If the Submit button does not become active that means one or more sections have not been completed or it is before the program opening day. [For instructions about submitting the IA on opening day, see the next page.]
- Once the Initial Application has been submitted you will only have access to review your Application online. When an administrator has approved your Initial Application you will be able to prepare the Final Application.

Figure 25: Submit Initial Application (After Opening Day)

Projects > Project Information

Testing Project 123

Project ID # 2	Contract #	none
Initial Application Complete	Application status	Initial Application, not submitted
• Project Information <input checked="" type="checkbox"/>	Submittal Date	None
• Project Description <input checked="" type="checkbox"/>	Approved Date	None
• Site Information <input checked="" type="checkbox"/>	Estimated Savings	67.69 kW 227,928 kWh
• Savings Calculation <input checked="" type="checkbox"/>	Estimated incentive for this project	\$28,470.71
• Estimated Schedule <input checked="" type="checkbox"/>	Approved incentive	\$0.00
• Qualification Set <input checked="" type="checkbox"/>	Message	<div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>
- testing		
• Sponsor Contact <input checked="" type="checkbox"/>		
- John D. (512-372-8877)		

Project Info | **Measures** | Documents | Spreadsheets | Agreement | Qualification | Summary

ID	Customer	Lighting Savings		non-Lighting Savings		New Customer
		kW	kWh	kW	kWh	
2	Walget	38.15	116,826	29.54	111,102	Edit/View Customer and Measures
Total		38.15	116,826	29.54	111,102	

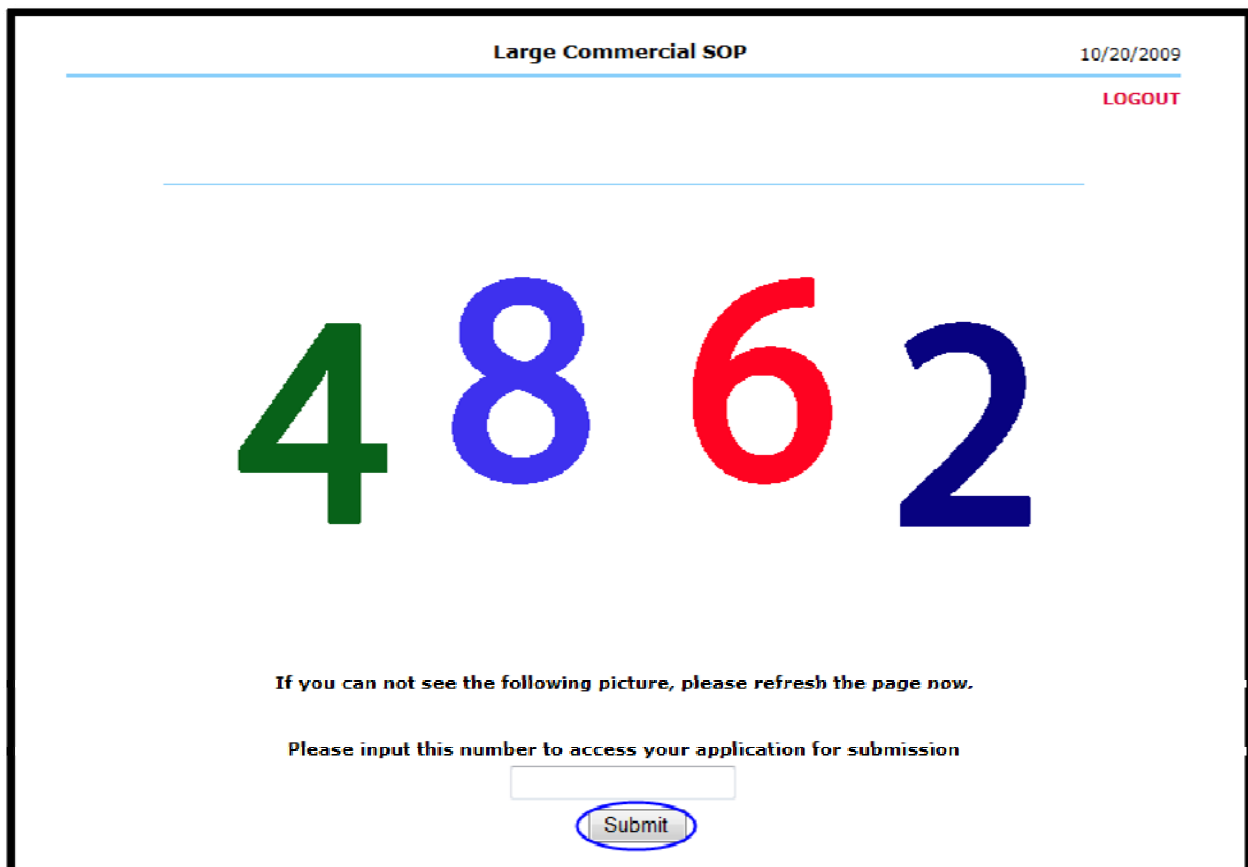
Original Requested Incentive: **\$28,470.45**

Note :
 No Lighting Adjustment
 No Load Factor Cap Adjustment
 Estimated Deposit: **\$1,423.52**

Submitting the Initial Application on Program Opening Day

- In order to submit the Application on program opening day, the application must be complete the day before. All sections of the application must have been completed prior to the *EnerTrek* system being closed.
- When the applicant logs in on opening day at the program opening time, they will be required to enter a four digit number in order to submit their initial application.

Figure 26: Submit Application (Opening Day)



The screenshot shows a web interface for submitting an application. At the top, it says "Large Commercial SOP" and "10/20/2009". There is a "LOGOUT" link in the top right. The main content area displays a large CAPTCHA consisting of the numbers 4, 8, 6, and 2 in different colors (green, blue, red, and dark blue). Below the CAPTCHA, there is a message: "If you can not see the following picture, please refresh the page now." Underneath that, it says "Please input this number to access your application for submission". There is an empty text input field and a "Submit" button below the input field.

Phase Three – Final Application

- When your Initial Application has been approved by an Administrator the Status column will display “Initial Application, approved”.
- In order to submit the Final Application you will need to prepare the Final Application form.
- Choose **Edit/Submit/Delete** beside the Project for which you wish to prepare the Final Application form.

Figure 25: Initial Application Approved

Projects

- Maximum Sponsor Limit : \$105,397.00
- Minimum Project Size (kW) : 1 kW
- Total incentive reserved for this Sponsor : \$28,470.71

ID	Project	Estimated kW Savings	Estimated kWh Savings	Estimated incentive	Status	Final App. Due Date	
2	Testing Project 123	67.69	227,928	\$28,470.71	Initial Application, approved	3/20/2010	<input type="button" value="New Project"/>
							<input type="button" value="Edit/Submit/Delete"/>

- Press the *Prepare Final Application* button.

Figure 24: Prepare Final Application

Projects > Project Information

Testing Project 123	Contract #	none
Project ID # 2	Application status	Initial Application, approved
Initial Application Complete	Submittal Date	1/19/2010
• Project Information <input checked="" type="checkbox"/>	Approved Date	1/19/2010 11:54:48 PM
• Project Description <input checked="" type="checkbox"/>	Estimated Savings	67.69 kW 227,928 kWh
• Site Information <input checked="" type="checkbox"/>	Estimated incentive for this project	\$28,470.71
• Savings Calculation <input checked="" type="checkbox"/>	Approved incentive	\$28,470.71
• Estimated Schedule <input checked="" type="checkbox"/>	Message	
• Qualification Set <input checked="" type="checkbox"/>		
- testing		
• Sponsor Contact <input checked="" type="checkbox"/>		
- John D. (512-372-8877)		

[1/19/2010 11:54:48 PM - Program Manager, Admin Frontier]
Initial Application Approved

Application has been approved. Please click on "Prepare Final Application" to finish the Final Application.

- Project Info
- Measures
- Documents
- Spreadsheets
- Agreement
- Qualification
- Summary

Project Information TOP

Project Name :

Comments :

Project Type : New Construction Retrofit Combination

• Contact Person : John D. (512-372-8877)

Project Description TOP

Provide a basic description of the project, including energy efficiency measures and the activities that will be performed by the project sponsor

- The Status column will change to “Final Application, not submitted” beside the Project for which you have prepare the Final Application.
- Choose the *Edit/Submit/Delete* button beside this Project.

Figure 24: Main Menu

Projects

- Maximum Sponsor Limit : \$105,397.00
- Minimum Project Size (kW) : 1 kW
- Total incentive reserved for this Sponsor : \$28,470.71

ID	Project	Estimated kW Savings	Estimated kWh Savings	Estimated incentive	Status	Final App. Due Date	
2	Testing Project 123	67.69	227,928	\$28,470.45	Final Application, not submitted	3/20/2010	<input type="button" value="New Project"/> <input type="button" value="Edit/Submit/Delete"/>

- Information entered in the Initial Application will be pulled into the Final Application form. Changes can be made to the forms by clicking the appropriate section links.
- Site Information: In the IA stage, the kW and kWh savings estimates can be manually input into the database or equipment survey forms can be uploaded. In the FA, IR and SR stages, the kW and kWh savings must be uploaded into the system using one of the equipment inventory spreadsheets. These spreadsheets serve as documentation of the measures installed.
- If you did not upload a spreadsheet in the IA and elected to manually input savings estimates, you will need to upload one of the approved equipment upload spreadsheets provided before submitting the FA.
- There are specific lighting, HVAC, motors and window film upload spreadsheets. For all other measures, please use the “Other Measures Survey” spreadsheet to upload the measure.
- You must use one of the 2010 Commercial-approved upload equipment inventory spreadsheets to upload to the system. These spreadsheets can be downloaded from the “Downloads” tab on the top menu bar in *EnerTrek*.

Figure 25: Review Project Information

Projects > Project Information

Testing Project 123		Contract #	none
Project ID #	2	Application status	Final Application, not submitted
Final Application	Complete	Submittal Date	None
• Project Information	<input checked="" type="checkbox"/>	Approved Date	None
• Project Description	<input checked="" type="checkbox"/>	Estimated Savings	67.69 kW 227,928 kWh
• Site Information	<input checked="" type="checkbox"/>	Estimated incentive for this project	\$28,470.71
• Savings Calculation	<input checked="" type="checkbox"/>	Approved incentive	\$0.00
• Estimated Schedule	<input checked="" type="checkbox"/>	Message	
• Qualification Set	<input checked="" type="checkbox"/>	[1/19/2010 11:56:21 PM - John D.]	
- testing		Final Application Preparing	
• Sponsor Contact	<input checked="" type="checkbox"/>	[1/19/2010 11:54:48 PM - Program Manager, Admin]	
- John D. (512-372-8877)			
		Submit	Duplicate Delete

[Project Info](#) | [Measures](#) | [Documents](#) | [Spreadsheets](#) | [Agreement](#) | [Qualification](#) | [Summary](#)

Project Information TOP

Project Name :

Comments :

- If you have not uploaded an equipment survey spreadsheet, go to the Project main page, click on the Site Information link, next click on *Edit/View Customer and Measures*, and then click on the *Edit /View* link adjacent to the project.

Figure 26: Uploading Savings Information

Projects > Project Information

Testing Project 123		Contract #	none
Project ID #	2	Application status	Final Application, not submitted
Final Application	Complete	Submittal Date	None
• Project Information	<input checked="" type="checkbox"/>	Approved Date	None
• Project Description	<input checked="" type="checkbox"/>	Estimated Savings	67.69 kW 227,928 kWh
• Site Information	<input checked="" type="checkbox"/>	Estimated incentive for this project	\$28,470.71
• Savings Calculation	<input checked="" type="checkbox"/>	Approved incentive	\$0.00
• Estimated Schedule	<input checked="" type="checkbox"/>	Message	
• Qualification Set	<input checked="" type="checkbox"/>		
- testing			
• Sponsor Contact	<input checked="" type="checkbox"/>		
- John D. (512-372-8877)			

[1/19/2010 11:56:21 PM - John D.]
Final Application Preparing

[1/19/2010 11:54:48 PM - Program Manager, Admin]

Project Info
Measures
Documents
Spreadsheets
Agreement
Qualification
Summary

ID	Customer	Lighting Savings		non-Lighting Savings		New Customer
		kW	kWh	kW	kWh	
2	Walget	38.15	116,826	29.54	111,102	Edit/View Customer and Measures
Total		38.15	116,826	29.54	111,102	

Original Requested Incentive: **\$28,470.45**

Note : No Lighting Adjustment
No Load Factor Cap Adjustment

Required Deposit: **\$1,423.54**

Figure 27: Edit Measure

Customer : **Walget**

ID	Measures	Survey Forms	Uploaded Date	Total Saving		New Measure
				kW	kWh	
3	CalcSmart	Form	1/19/2010 11:56:21 PM	23.10	49,315	Edit/View
4	Combo Lighting Spreadsheet	Form	1/19/2010 11:56:21 PM	15.05	67,511	Edit/View
5	Motor Survey Form	Form	1/19/2010 11:56:21 PM	10.00	50,000	Edit/View
6	Window Film Survey Form	Form	1/19/2010 11:56:21 PM	15.04	11,102	Edit/View
7	Other Measures Survey Form	Form	1/19/2010 11:56:21 PM	4.50	50,000	Edit/View
Total			Non-Lighting	29.54	111,102	
			Lighting	38.15	116,826	

- Choose the *New Measures* button for the appropriate customer for the information you are uploading
- Choose the *Upload spreadsheet* button.

Figure 28: Upload Spreadsheet

Customer : **Walget**

ID	Measures	Survey Forms	Uploaded Date	Total Saving		New Measure
				kW	kWh	
3	CalcSmart	Form	1/19/2010 11:56:21 PM	23.10	49,315	Edit/View
4	Combo Lighting Spreadsheet	Form	1/19/2010 11:56:21 PM	15.05	67,511	Edit/View
5	Motor Survey Form	Form	1/19/2010 11:56:21 PM	10.00	50,000	Edit/View
6	Window Film Survey Form	Form	1/19/2010 11:56:21 PM	15.04	11,102	Edit/View
7	Other Measures Survey Form	Form	1/19/2010 11:56:21 PM	4.50	50,000	Edit/View
Total			Non-Lighting	29.54	111,102	
			Lighting	38.15	116,826	

Customer : **Walget**

Proposed Measure

Check here if this is a lighting measure:

Saving	
Peak Demand Saving (kW)	<input type="text" value="0"/>
Annual Electricity Saving (kWh)	<input type="text" value="0"/>

- (a) Please download the revised equipment survey forms from the Download section within this database.
- (b) These spreadsheets account for power adjustment factors and calculate the interactive effects savings.
- (c) Once you have completed the equipment survey forms, please **UPLOAD** these spreadsheets into the online form.

-
- First, choose the type of equipment survey you wish to upload.
 - Click on Browse to select the survey form from your computer.
 - Then, click on the Upload button. A few moments later, you'll receive a message saying the upload was successful.

Figure 29: Upload Spreadsheet (Continued)

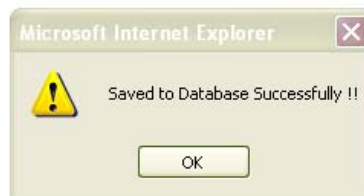
Add survey forms by uploading xxxx.XLS file from your computer

Select a .XLS file from your computer to upload:

Survey Form Type :

- CalcSmart
- Combo Lighting Spreadsheet
- Motor Survey Form
- Other Measures Survey Form
- Window Film Survey Form

- Before attempting to upload an equipment survey, please download the 2010 forms from the Downloads link on the main menu. Forms from 2009 will fail to upload in the 2010 program.
- Please select Survey Type from the above list.
- This file must be saved as a .XLS file. Deviation from this format will result in errors during the upload process.
- Use the **Other Measures Form** for all measures other than HVAC, Lighting, Motors, Window Film and Roofing.



-
- If the uploaded kW and kWh savings is not correct, show 0 savings, or the upload was unsuccessful, check your spreadsheet for possible data entry errors, correct any errors and upload the spreadsheet again. Also make sure you choose the radio button for the type of spreadsheet you are trying to upload.
 - If the measure is anything other than lighting, HVAC, motors or window film, please use the ***Other Measures*** upload spreadsheet. In the Other Measures spreadsheet you only need to describe the efficiency measure and input the kW and kWh savings in the appropriate columns. You will also need to provide hardcopy documentation of the energy and demand savings to the program administrator.
 - Once the equipment survey forms are uploaded, you may access them by clicking on the appropriate spreadsheet listed under *Survey Forms*. The table also shows the date and time the spreadsheet was uploaded to the system. The survey name is a link to that spreadsheet so it can be downloaded.
 - If you need to re-upload a spreadsheet because the estimates are not correct, revise the spreadsheet, delete the measure and upload the spreadsheet again.
 - When all changes and required information has been entered into each section of the Project Information form choose ***Update Project Information***.

- The **Submit** button will become active when all information shows complete. The Final Application is ready to be submitted.
- Once the Final Application has been submitted you will only have access to review your Application online. When the administrator has approved your Final Application you should accept the FA Project Authorization form. You may prepare the Installation Report after the FA is approved.

Figure 30: Submit Final Application

Projects > Project Information

Testing Project 123

Project ID # 2

Final Application Complete

- Project Information
- Project Description
- Site Information
- Savings Calculation
- Estimated Schedule
- Qualification Set
- testing
- Sponsor Contact
- John D. (512-372-8877)

Contract # none

Application status **Final Application, not submitted**

Submittal Date None

Approved Date None

Estimated Savings 77.69 kW 277,928 kWh

Estimated incentive for this project \$33,770.71

Approved incentive \$0.00

Message

[1/19/2010 11:56:21 PM - John D.]
Final Application Preparing

[1/19/2010 11:54:48 PM - Program Manager, Admin]

Project Info
Measures
Documents
Spreadsheets
Agreement
Qualification
Summary

ID	Customer	Lighting Savings		non-Lighting Savings		New Customer
		kW	kWh	kW	kWh	
2	Walget	38.15	116,826	39.54	161,102	Edit/View Customer and Measures
Total		38.15	116,826	39.54	161,102	

Original Requested Incentive: **\$33,770.45**
Note : No Lighting Adjustment
 No Load Factor Cap Adjustment
 Required Deposit: **\$1,423.54**

- The FA has been approved, needs to accept the Final Application Agreement first. By clicking on the link, *Application Agreement*, and click on the “Yes” radio button to accept the Agreement.

Figure 31: Final Application Approval – Final Agreement

Projects

- Maximum Sponsor Limit : \$105,397.00
- Minimum Project Size (kW) : 1 kW
- Total incentive reserved for this Sponsor : \$33,770.71

ID	Project	Estimated kW Savings	Estimated kWh Savings	Estimated incentive	Status	Final App. Due Date	
2	Testing Project 123	77.69	277,928	\$33,770.71	Final Application, approved	3/20/2010	New Project Edit/Submit/Delete

Figure 33: Accept Final Agreement

Projects > Project Information

Testing Project 123

Project ID #	2	Contract #	none
Final Application	Complete	Application status	Final Application, approved
• Project Information	<input checked="" type="checkbox"/>	Submittal Date	1/20/2010
• Project Description	<input checked="" type="checkbox"/>	Approved Date	1/20/2010 12:02:54 AM
• Site Information	<input checked="" type="checkbox"/>	Estimated Savings	77.69 kW 277,928 kWh
• Savings Calculation	<input checked="" type="checkbox"/>	Estimated incentive for this project	\$33,770.71
• Estimated Schedule	<input checked="" type="checkbox"/>	Approved incentive	\$33,770.71
• Application Agreement	<input type="checkbox"/>	Message	[1/20/2010 12:02:54 AM - Program Manager, Admin Frontier] Final Application Approved
• Qualification Set	<input checked="" type="checkbox"/>		
- testing			
• Sponsor Contact	<input checked="" type="checkbox"/>		
- John D. (512-372-8877)			

Submit Duplicate Delete

Prepare Installation Report

Please accept Final Application Agreement first.

- Project Info
- Measures
- Documents
- Spreadsheets
- Agreement**
- Qualification
- Summary

Final Application Agreement [TOP](#)

[Download AEP Texas Central Company CSOP Agreement PDF File](#)

Note:The Standard Agreement has the current estimated kW and kWh savings, however, the maximum incentive dollars will not be finalized until the utility administrator approves this Final Application (FA). After FA approval, the incentive dollars will be updated. At that time, please print and sign the final contract with the approved incentive dollars and send a copy to the utility administrator

Do you accept Final Application Agreement Yes No

[Save](#)

Phase Four: Installation and Savings Report

- Now move to the next stage, the Installation Report, by clicking on the *Prepare Installation Report* button.

Figure 34: Prepare Installation Report

Projects > Project Information

Testing Project 123		Contract #	none
Project ID #	2	Application status	Final Application, approved
Final Application	Complete	Submittal Date	1/20/2010
• Project Information	<input checked="" type="checkbox"/>	Approved Date	1/20/2010 12:02:54 AM
• Project Description	<input checked="" type="checkbox"/>	Estimated Savings	77.69 kW 277,928 kWh
• Site Information	<input checked="" type="checkbox"/>	Estimated incentive for this project	\$33,770.71
• Savings Calculation	<input checked="" type="checkbox"/>	Approved incentive	\$33,770.71
• Estimated Schedule	<input checked="" type="checkbox"/>	Message	
• Application Agreement	<input checked="" type="checkbox"/>	[1/20/2010 12:02:54 AM - Program Manager, Admin Frontier] Final Application Approved	
• Qualification Set	<input checked="" type="checkbox"/>		
- testing			
• Sponsor Contact	<input checked="" type="checkbox"/>		
- John D. (512-372-8877)			

Submit Duplicate Delete

Prepare Installation Report

Application has been approved. Please click on "Prepare Installation Report" to finish the Installation Report.

- The status is now “Installation Report, not submitted”. Choose Edit/Submit/Delete to edit and submit the IR.

Figure 35: Submit Installation Report

Projects

- Maximum Sponsor Limit : \$105,397.00
- Minimum Project Size (kW) : 1 kW
- Total incentive reserved for this Sponsor : \$33,770.71

ID	Project	Estimated kW Savings	Estimated kWh Savings	Estimated incentive	Status	Final App. Due Date	
2	Testing Project 123	77.69	277,928	\$33,770.45	Installation Report, not submitted	3/20/2010	Edit/Submit/Delete

New Project

- You may upload revised equipment survey forms if the estimated savings need to be adjusted. The procedures are the same as before when you upload an equipment survey form.
- If replacing an equipment survey form with a revised version, first delete the measure that is being replace and then add a New Measure, uploading the revised survey form.
- When all information is correct and the savings have been adjusted as needed, the Installation Report can be submitted by choosing the Submit button.

Figure 36: Submit Installation Report (Continued)

Projects > Project Information

Testing Project 123	Contract #	none
Project ID # 2	Application status	Installation Report, not submitted
Installation Report Complete	Submittal Date	None
• Project Information <input checked="" type="checkbox"/>	Approved Date	None
• Project Description <input checked="" type="checkbox"/>	Estimated Savings	77.69 kW 277,928 kWh
• Site Information <input checked="" type="checkbox"/>	Estimated incentive for this project	\$33,770.71
• Savings Calculation <input checked="" type="checkbox"/>	Approved incentive	\$0.00
• Estimated Schedule <input checked="" type="checkbox"/>	Message	
• Qualification Set <input checked="" type="checkbox"/>		
- testing		
• Sponsor Contact <input checked="" type="checkbox"/>		
- John D. (512-372-8877)		

[1/20/2010 12:09:37 AM - John D.]
Installation Report Preparing

[1/20/2010 12:02:54 AM - Program Manager, Admin]

- The Status of the project now shows the IR has been submitted and is under review. You will receive an e-mail notice when the IR is approved so that you may submit the SR.

Figure 37: Review Installation Report

Projects

- Maximum Sponsor Limit : \$105,397.00
- Minimum Project Size (kW) : 1 kW
- Total incentive reserved for this Sponsor : \$33,770.71

ID	Project	Estimated kW Savings	Estimated kWh Savings	Estimated incentive	Status	Final App. Due Date	
2	Testing Project 123	77.69	277,928	\$33,770.45	Installation Report, submitted, reviewing	3/20/2010	<input type="button" value="New Project"/> <input type="button" value="Edit/Submit/Delete"/>

- The IR has been approved and you may move to the next stage, the Savings Report. Projects with IR approval are shown under Status. Choose the *Edit/Submit/Delete* button for the appropriate project.

Figure 38: Prepare Savings Report

Projects

- Maximum Sponsor Limit : \$105,397.00
- Minimum Project Size (kW) : 1 kW
- Total incentive reserved for this Sponsor : \$33,770.71

ID	Project	Estimated kW Savings	Estimated kWh Savings	Estimated incentive	Status	Final App. Due Date	
2	Testing Project 123	77.69	277,928	\$33,770.71	Installation Report, approved	3/20/2010	<input type="button" value="New Project"/> <input type="button" value="Edit/Submit/Delete"/>

- Choose the **Prepare Savings Report** button to prepare the savings report.

Figure 39: Prepare Savings Report (Continued)

Projects > Project Information

Testing Project 123

Project ID # 2

Installation Report Complete

- Project Information
- Project Description
- Site Information
- Savings Calculation
- Estimated Schedule
- Qualification Set
- testing
- Sponsor Contact
- John D. (512-372-8877)

Contract # none

Application status **Installation Report, approved**

Submittal Date 1/20/2010

Approved Date 1/20/2010 12:11:34 AM

Estimated Savings 77.69 kW 277,928 kWh

Estimated incentive for this project \$33,770.71

Approved incentive \$33,770.71

Message

[1/20/2010 12:11:34 AM - Program Manager, Admin Frontier]
Installation Report Approved

Submit Duplicate Delete **Prepare Savings Report**

Application has been approved. Please click on "Prepare Savings Report" to finish the Savings Report.

- To edit the kW and kWh savings, choose the Edit/Submit/Delete button and follow the same procedures to upload a revised equipment survey spreadsheet.
- When the revised spreadsheets are uploaded and all information is correct, you may submit the SR.

Figure 40: Submit Savings Report

Projects

- Maximum Sponsor Limit : \$105,397.00
- Minimum Project Size (kW) : 1 kW
- Total incentive reserved for this Sponsor : \$33,770.71

ID	Project	Estimated kW Savings	Estimated kWh Savings	Estimated incentive	Status	Final App. Due Date	
2	Testing Project 123	77.69	277,928	\$33,770.45	Savings Report, not submitted	3/20/2010	Edit/Submit/Delete

New Project

- The application status shows the SR has not been submitted. All sections are shown as complete and you have verified the kW and kWh savings are correct. Choose **Submit** to submit the SR.
- By submitting the SR, you are telling the program administrator the project is complete and final.
- You will receive an e-mail notification when the program administrator approves the SR.

Figure 40: Submit Savings Report (Continued)

Projects > Project Information

Testing Project 123		Contract #	none
Project ID #	2	Application status	Savings Report, not submitted
Savings Report	Complete	Submittal Date	None
• Project Information	<input checked="" type="checkbox"/>	Approved Date	None
• Project Description	<input checked="" type="checkbox"/>	Estimated Savings	77.69 kW 277,928 kWh
• Site Information	<input checked="" type="checkbox"/>	Estimated incentive for this project	\$33,770.71
• Savings Calculation	<input checked="" type="checkbox"/>	Approved incentive	\$0.00
• Estimated Schedule	<input checked="" type="checkbox"/>	Message	
• Qualification Set	<input checked="" type="checkbox"/>	[1/20/2010 12:12:37 AM - John D.]	
- testing		Savings Report Preparing	
• Sponsor Contact	<input checked="" type="checkbox"/>	[1/20/2010 12:11:34 AM - Program Manager, Admin	
- John D. (512-372-8877)			