

Process Summary

1. Create Project in P3 (create customer, premise and schedule assessment)
2. Enter Pre-Package Checklist documents and materials in P3 (see below)
3. Pre-Approval by a Program representative in P3
4. Work Installation
5. Enter Post-Package Checklist documents and materials in P3 (see below)
6. Final Approval by a Program representative in P3 (upon savings verification)
7. Payment (upon Final Approval)

Pre-Package Checklist

Items listed below are **required** before a small commercial customer can begin a project through Cleco's Small Commercial Energy Efficiency Program.

- **Project Sponsor and Customer Agreement**
 - Signed by Project Sponsor and Customer (and subcontractor, if applicable)
- **Recent copy of customers Cleco utility bill**
- **Drawings, Sketch or Map** of facility with locations of installed measures
- **Certifications** for fixtures/lamps listed on invoice and calculator inventory
 - **Energy Star, AHRI or DLC** website screen shots showing model number
- **LSF or ACE Calculator** in Excel Format
 - Most recent version needs to be used
 - All fields on the **Project Info** tab needs to be filled out
- **Pre Pictures**
 - Outside view of business name/building
 - Showing fixture layout, and the wattages and model numbers of fixtures/lamps
- **Estimate or Quote**
 - Itemized cost
 - Fixture/lamp model #s
 - Fixture/lamp counts must match or exceed counts on calculator
- **Estimated Completion Date /Work Schedule**
 - Must be in writing
- **National Accounts**
 - Notification of how payment should be made (i.e., corporate location or to the local store location)

Post-Package Checklist

Items listed below are **required** after a commercial or industrial customer completes a project through Cleco's Large Commercial & Industrial Energy Efficiency Program in order to receive an incentive.

- **Itemized Bill of Materials**
 - Equipment model numbers and quantity
- **Certifications of Equipment**
 - Energy Star for DLC, AHRI
- **Post Pictures**
 - Outside view of business name/building
 - Showing fixture layout, and the wattages and model numbers of fixtures/lamps
- **New LSF or ACE Calculator**
 - Required only measures installed are different than stated before program approval
- **All Bills Paid Affidavit**
 - Required only if a subcontractor was used by the Project Sponsor
- **Customer Acknowledgement Form**
 - Signed by Customer and Project Sponsor (and subcontractor, if applicable)