P3 USER GUIDE FOR MARKET ACTORS
RESIDENTIAL & HARD TO REACH
STANDARD OFFER PROGRAMS

Updated January 2017

Contents

INTRODUCTION

The P3 User Guide provides Market Actors in the Residential and Hard to Reach Standard Offer Programs with guidelines for registering as a new user, creating a sponsor profile, uploading documents, and project creation through submittal. Specific screen shots and directions are given for the majority of form-types that will be seen within the EnerTrek® P3 software, the online database tracking system.

When working with P3 Residential and Hard to Reach Standard Offer Program forms, a few principles should be observed:

- Unless specifically directed to use the browser's buttons, use the navigation buttons provided on the P3 forms.
- Avoid pressing a "submit" or "accept" button multiple times if your browser performance slows.
- Review the entire form before proceeding to ensure that all of the information required has been provided.
- 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 Residential and Hard to Reach Standard Offer Programs is ***EnerTrek® Program Portfolio Program (P3),*** developed specifically for the various Incentives Programs being implemented by utilities. Henceforth, the online data tracking system will be referred to as P3.

STEPS TO COMPLETE EACH STAGE

Registration

- Complete User Name & Password Form
- Click on email verification link
- Complete Company Profile

Applying to a Program (Enrollment)

- Complete Enrollment Form for program(s) desired
- Upload all required documents to company profile
- Submit completed enrollment form

Creating Project(s)

- Create project for specified program
- Add Customer information
- Add Premise information
  - One premise per unit if multi-family
    - All premises must be entered prior to requesting authorization
- Add work schedule
- Request Project Authorization

Work Completion

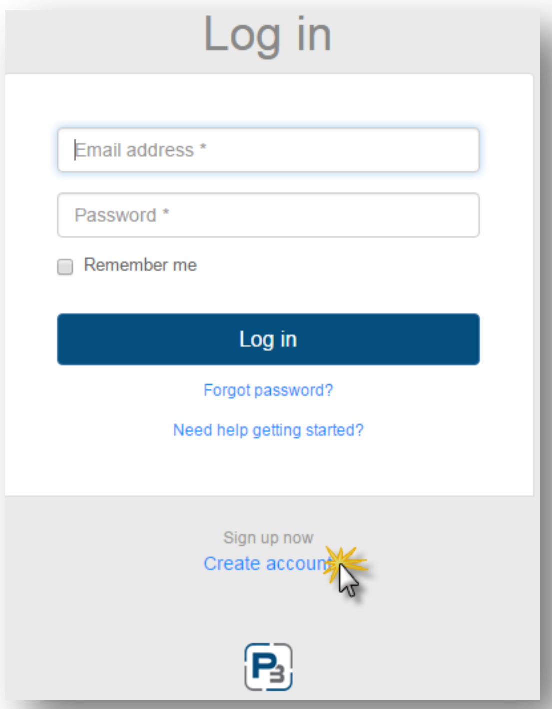
- Add measure information for each premise
  - All measures must be added prior to final submittal
- Upload required documents for all premises and the project
- Batch Submit projects or submit individually

No further tasks for Market Actors unless Administrators need additional information.

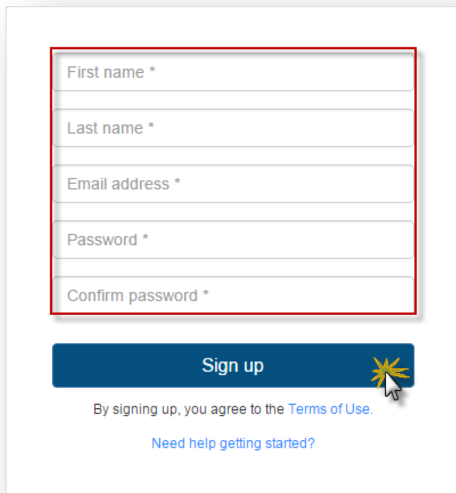
P3 REGISTRATION PROCESS

1. Navigate to: https://<utilityname>.p3.enertrek.com
2. Click on the Log In link

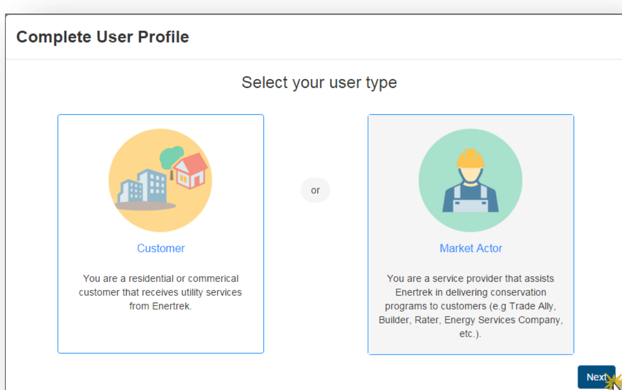
3. Click on the Create Account link



1. Enter all information (***Please note***: your email address and password entered will be your login credentials)
    a. First Name
    b. Last Name
    c. Email address
    d. Password
    e. Confirm Password



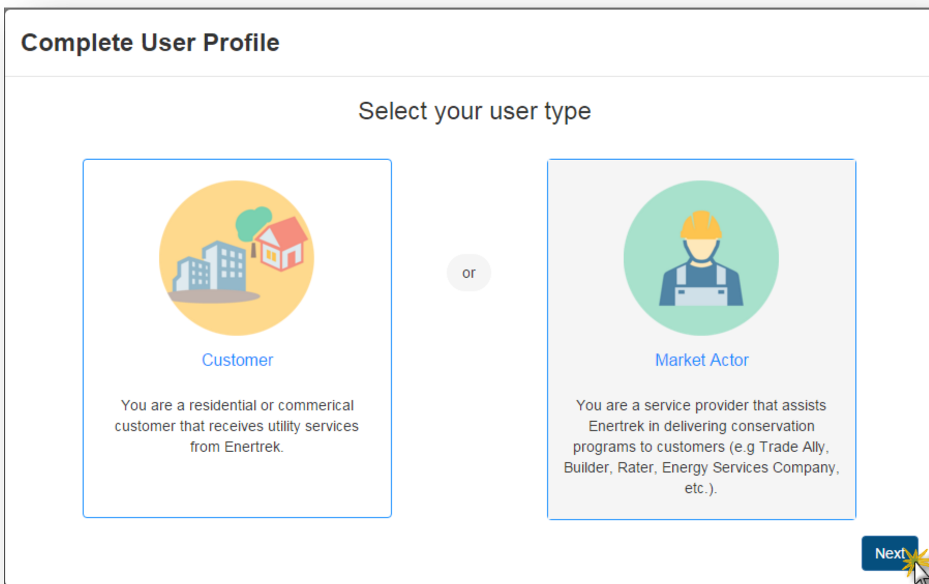
2. Click ***Sign up***
    a. Notification of verification email will display
3. Click on the Verification link in the automated email
    a. You may need to check your spam folders for this email if you do not receive it
    b. The Complete User Profile modal will display



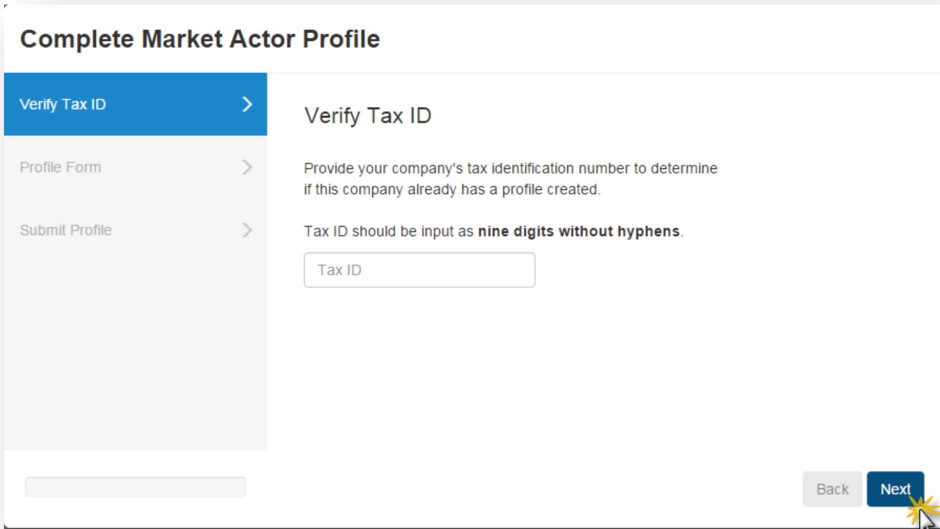
P3 Market Actor Profile

Create New Market Actor Profile

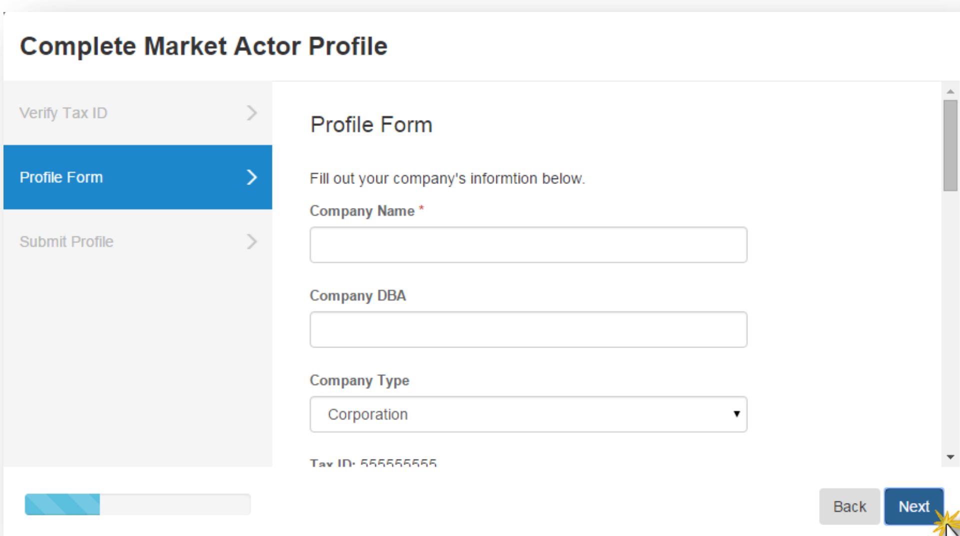
1. Select the link provided in the Verification email sent at P3 Registration
2. Select Market Actor & click ***Next*** OR
3. Log in with Username/Password
    a. Please note that this step can be bypassed if Market Actor Account is being created immediately after Registration
    b. Create new User Profile modal will display
    c. Select Market Actor & click ***Next***



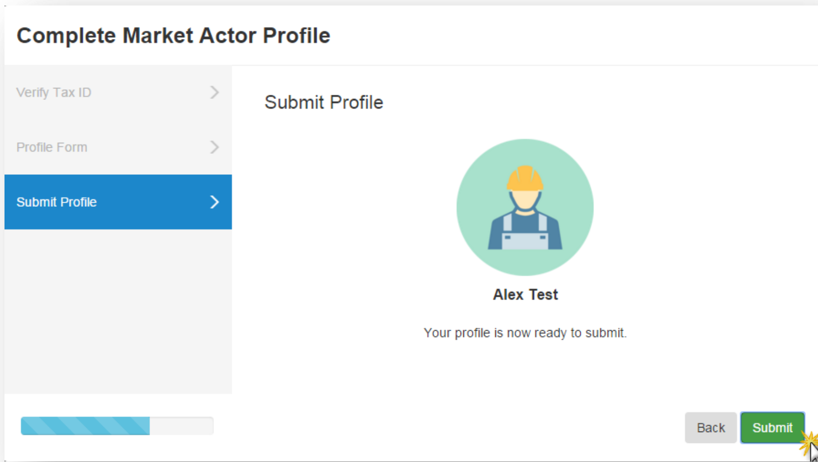
4. Enter Tax ID number & click ***Next***



5. Enter all required (indicated with a red asterisk *) Company information on the Market Actor Profile Form & click ***Next***



6. Once you are satisfied with all the inputs, Click ***Submit***
    a. Required fields that are missing information will be highlighted in Red

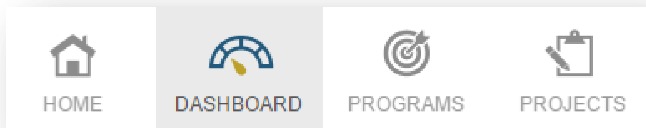


P3 Navigation

Global Navigation

Global navigation of the P3 platform is located at the top of every page. Market Actors have 3 main areas available to them: Home/Dashboard, Programs, and Projects. From these 3 areas, most actions can be executed.

The Dashboard icon is where you will land after logging in.



The Programs section contains the Program List where the Market Actor can obtain Program budget information and Enrollments which show which programs the Market Actor is enrolled in.

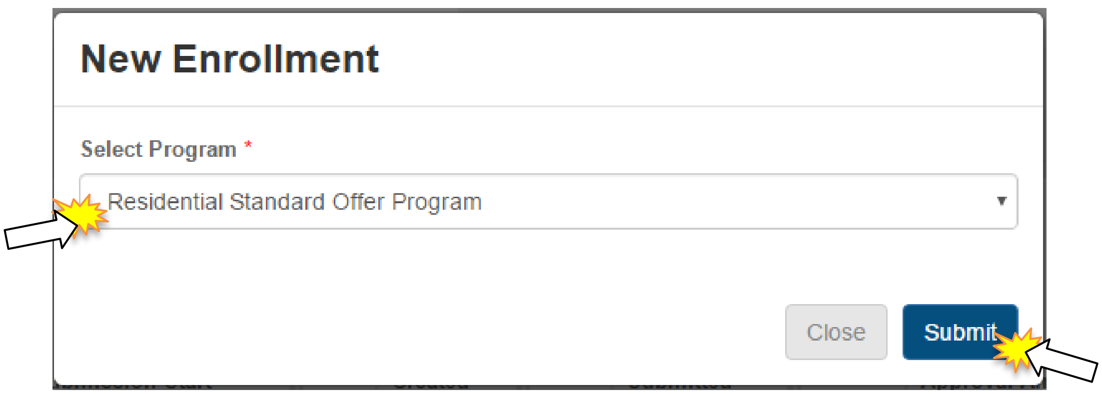
The Projects section is where projects are created, updated, and all measures are added. The Project List will display a list of all projects in all statuses. ***Note:*** Using the filters provided at the top of each column will allow users to view subsets of data.

P3 PROGRAM ENROLLMENTS

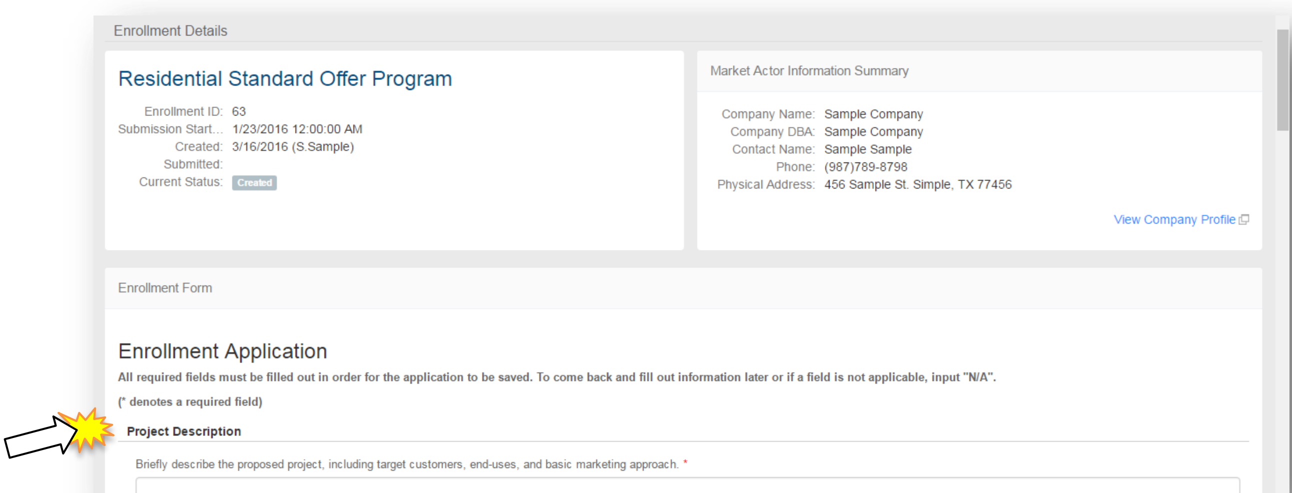
In order to get accepted into the Residential or Hard-to-Reach programs, you must first complete an enrollment application. Follow the steps below to complete the application.

PLEASE NOTE: All relevant and required documents should be uploaded to the company profile before submitting your enrollment application. Please see the Program Guide for required documents.

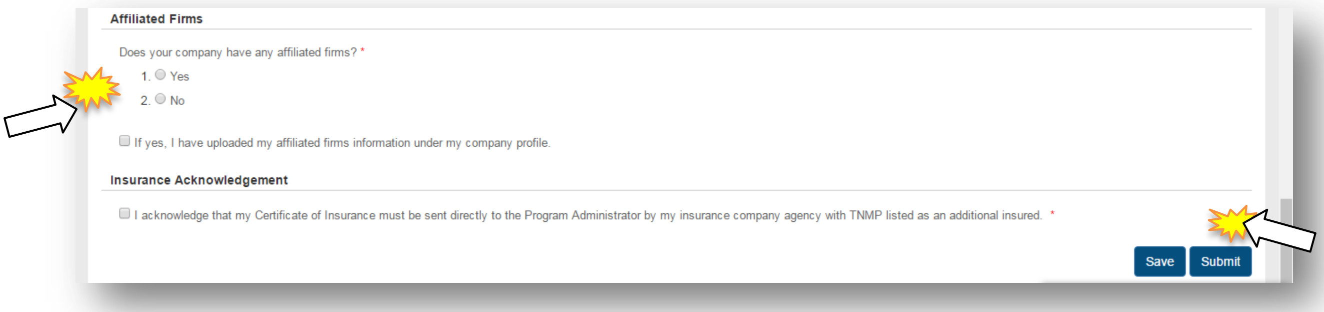
1. Navigate to the Programs section – Enrollments tab
2. Click on the ***New Enrollment*** button
    a. The new enrollment modal will appear



3. Select Residential Standard Offer Program or Hard to Reach Standard Offer Program
4. Click ***Submit***
    a. The new enrollment application will load
5. Complete all information in the enrollment application



6. Complete all acknowledgements at the bottom of the application
7. Click ***Submit*** to submit the application for Administrator Approval
8. Click ***Save*** to save the enrollment application and return to complete it another time

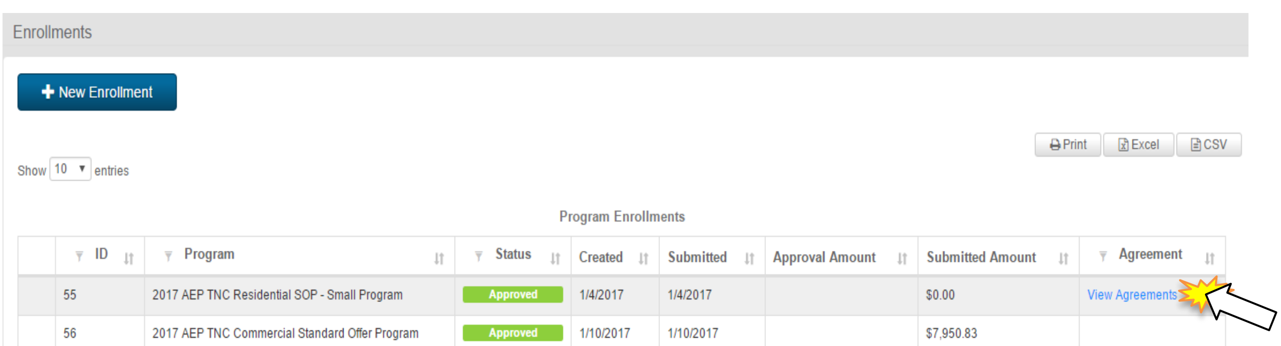


Please Note: The enrollment application will be processed and you will be notified via email upon approval or denial.

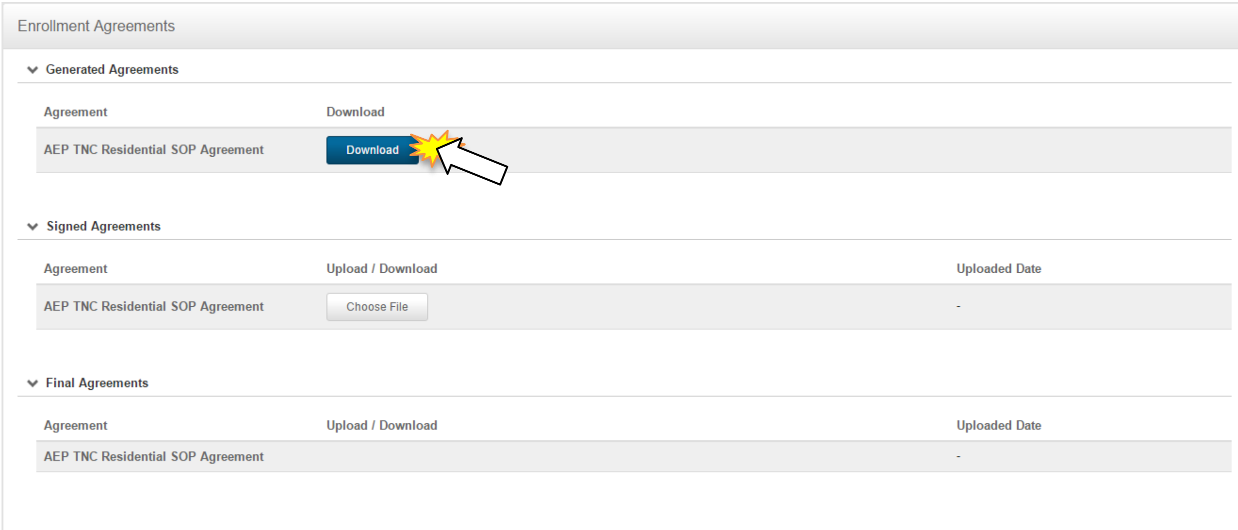
SOP Agreement

The SOP Agreement will be available to Market Actors to download and sign after they have been approved for the program.

Click on ***View Agreements*** next to the Enrollment that you wish to view.



Once you have navigated to the Agreements page, the SOP Agreement can be downloaded.



Upload the signed agreement by clicking on the ***Choose File*** button under Signed Agreements.

Click on the ***File Name*** listed next to the button under Signed Agreements to download the document.

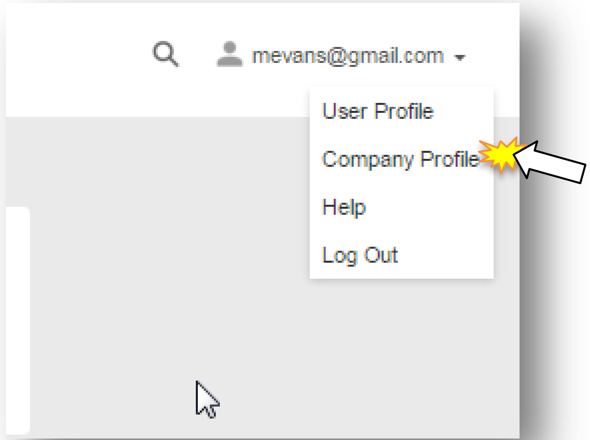
Program Administrators will upload the Final Agreement with the Adminstrator signature to the Final Agreements section.

P3 Program Enrollments – required Documents

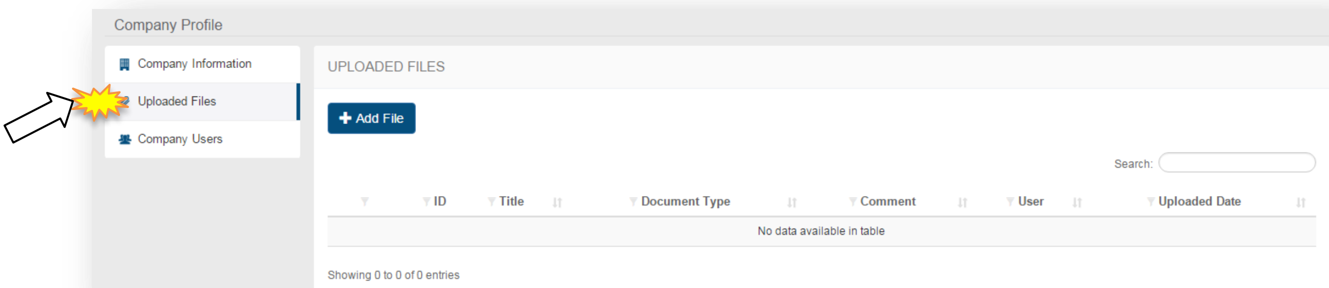
The Company Profile section is where Market Actors will upload certifications, licenses, W-9s and any other documents relating to their Enrollment Application.

Upload Market Actor Company Documents

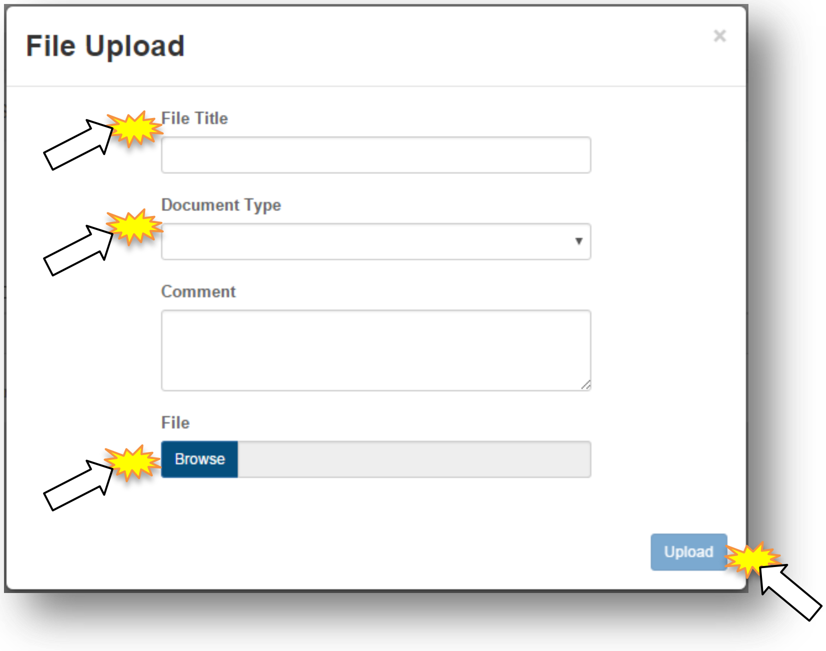
1. Click on Company Profile from the drop-down menu at the top right of the page under the Market Actor Username:



2. Go to the ***Uploaded Files*** tab



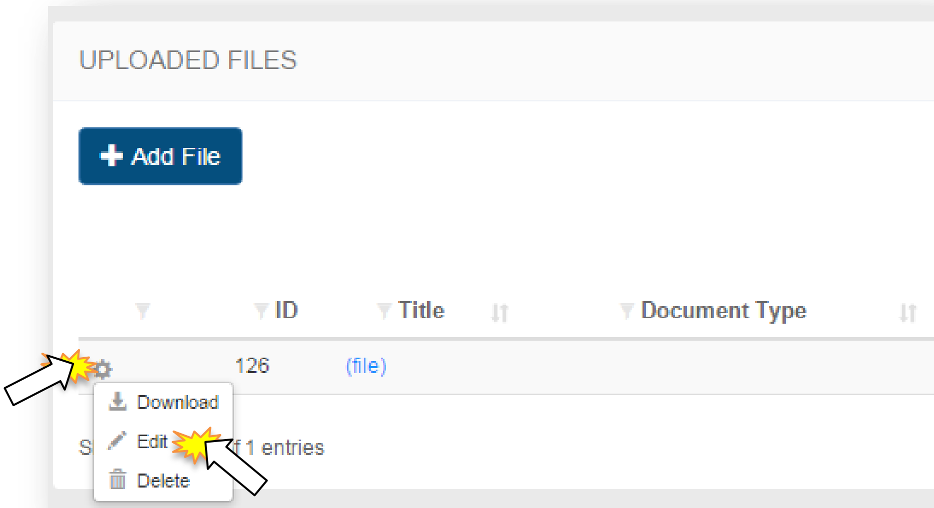
3. Click on the ***Add File*** button
4. Select the type of file being uploaded
5. Enter a title
6. Enter any notes associated with the file



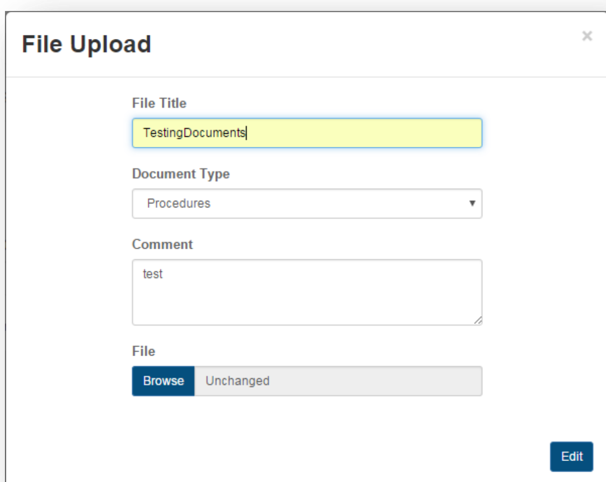
7. Select the file by clicking the Browse button
8. Click ***Upload***

Edit Market Actor Company Documents

1. Click on the Account drop down menu at the top right of the page
2. Go to the ***Uploaded Files*** tab
3. Click on the gear icon on the left hand side of a file already uploaded
4. Select the Edit option



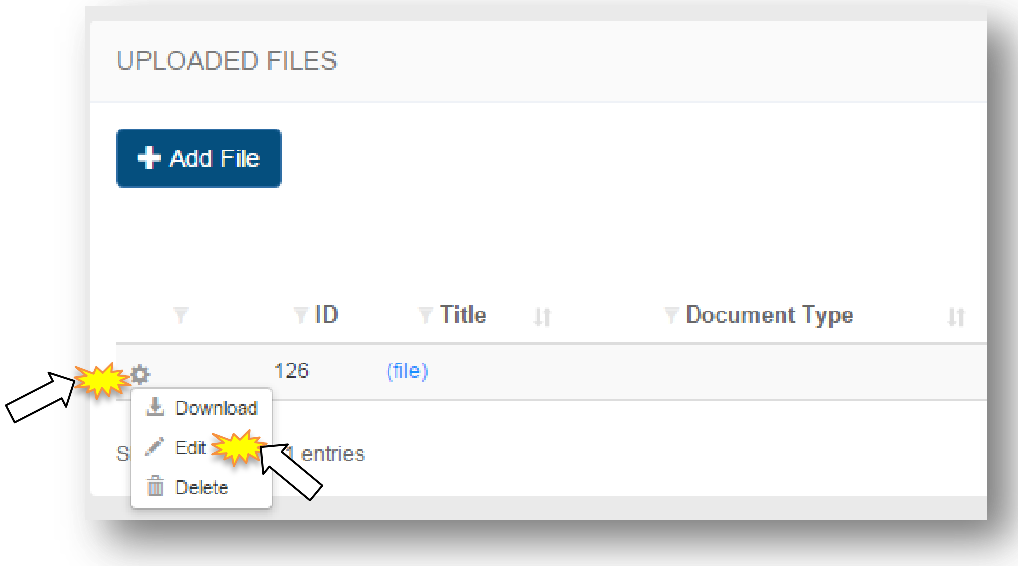
5. Edit File modal will appear
6. Make changes to the file (title, notes, different file, etc.)



7. Click ***Edit***

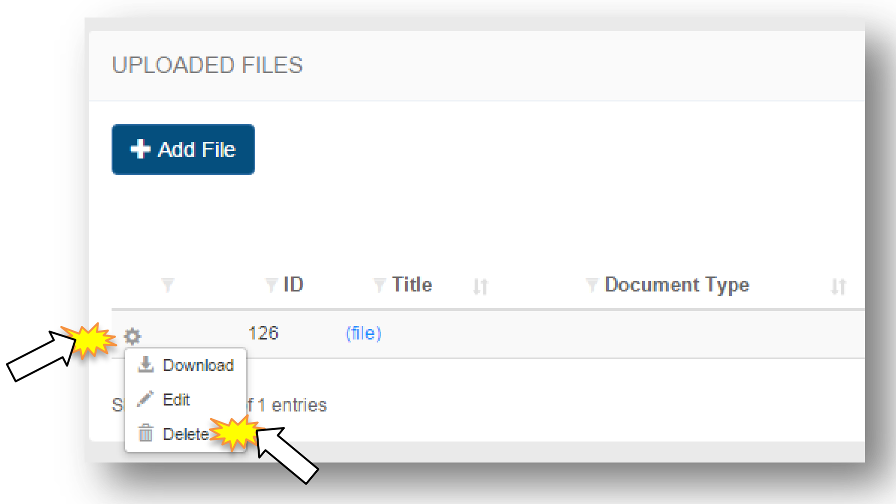
Download Market Actor Company Documents

1. Click on the Account drop down menu at the top right of the page
2. Go to the ***Uploaded Files*** tab
3. Click on the gear icon on the left hand side of a file already uploaded
4. Select the Download option

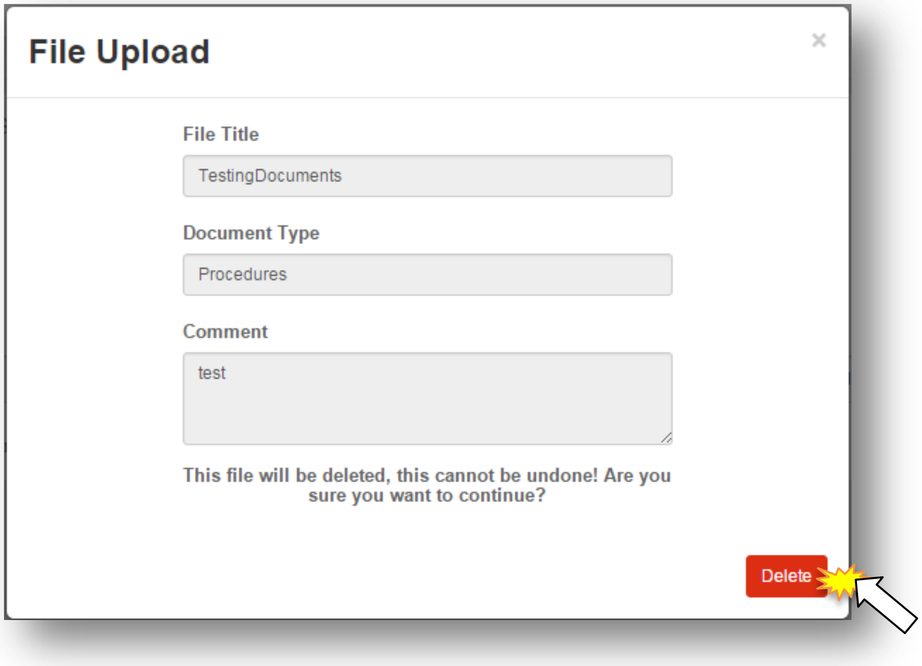


Delete Market Actor Company Documents

1. Click on the Account drop down menu at the top right of the page
2. Go to the ***Uploaded Files*** tab
3. Click on the gear icon on the left hand side of a file already uploaded
4. Select the ***Delete*** option



5. Delete file modal will appear

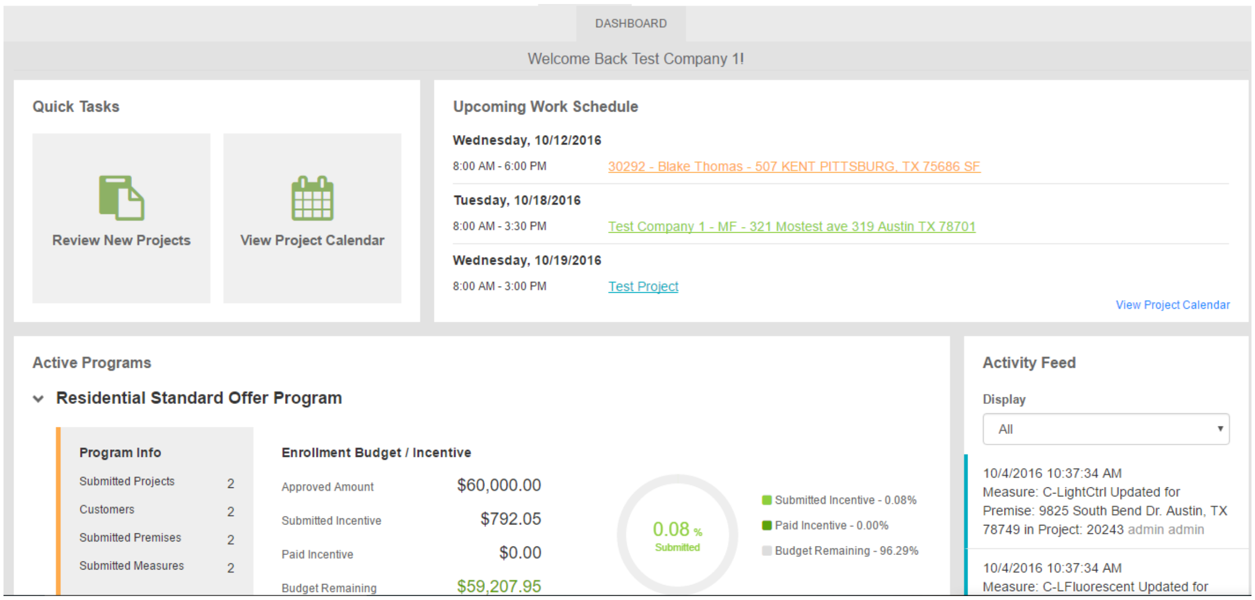


1. Click the ***Delete*** button
2. File will be deleted from the Company Profile

MARKET ACTOR DASHBOARD

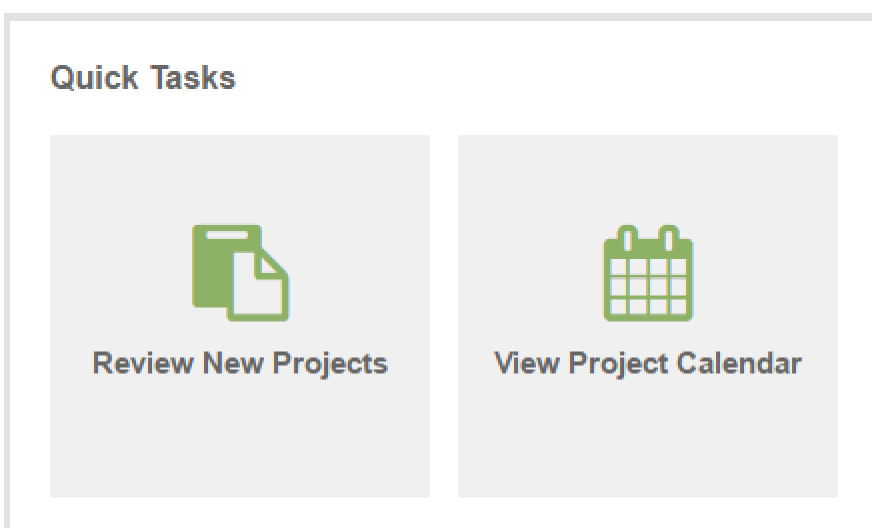
The Market Actor Dashboard is the first screen that Market Actor users will see upon logging in to P3. The Market Actor Dashboard contains roll-up information and high level stats for the programs. The Market Actor Dashboard also contains quick tasks, and a variety of actions can be taken from this page.

Click on the ***Dashboard*** icon at the top left of the global navigation bar.



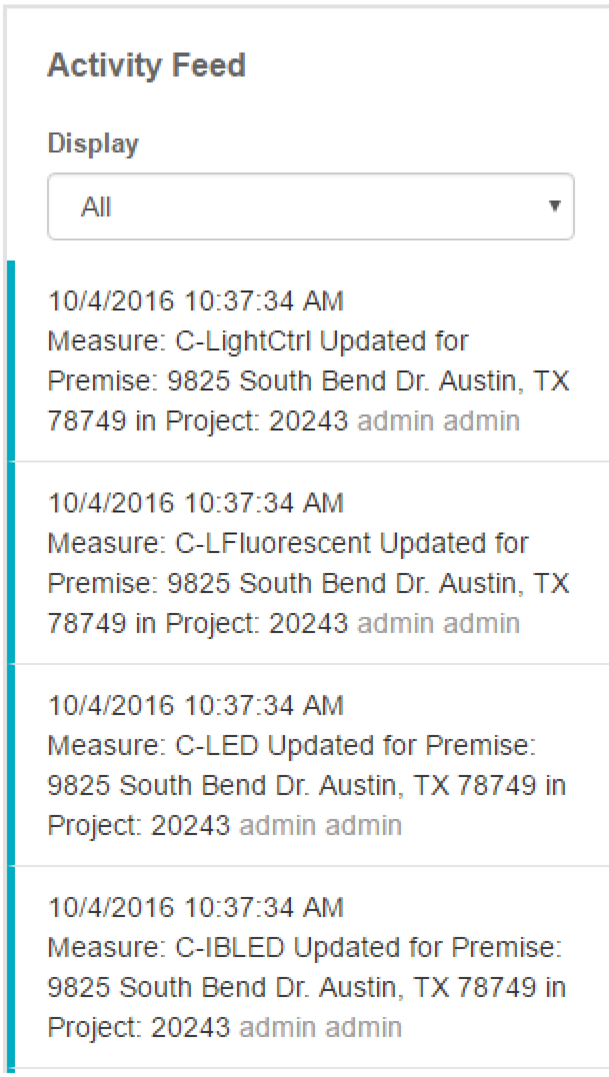
The Market Actor Dashboard will display.

The top left of the Market Actor Dashboard contains the Quick Task pane. This area contains options to take the user to specific actions that are frequently used.



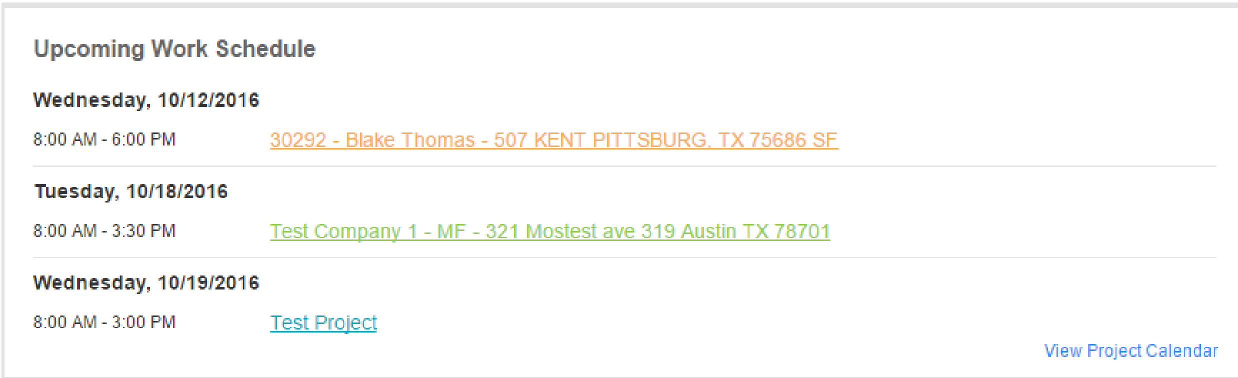
- Click ***Review New Projects*** to be taken to the filtered Project List viewing projects that are in Created or Initiated status.
- Click ***View Project Calendar*** to view the project calendar page containing all entered work events for all programs you are enrolled in.

The Activity Feed in the Market Actor Dashboard will display the most recent actions taken on projects. As a default view, actions performed on projects in all available programs will be displayed.



- Click on the ***Display*** drop-down menu to change the programs that will be displayed.

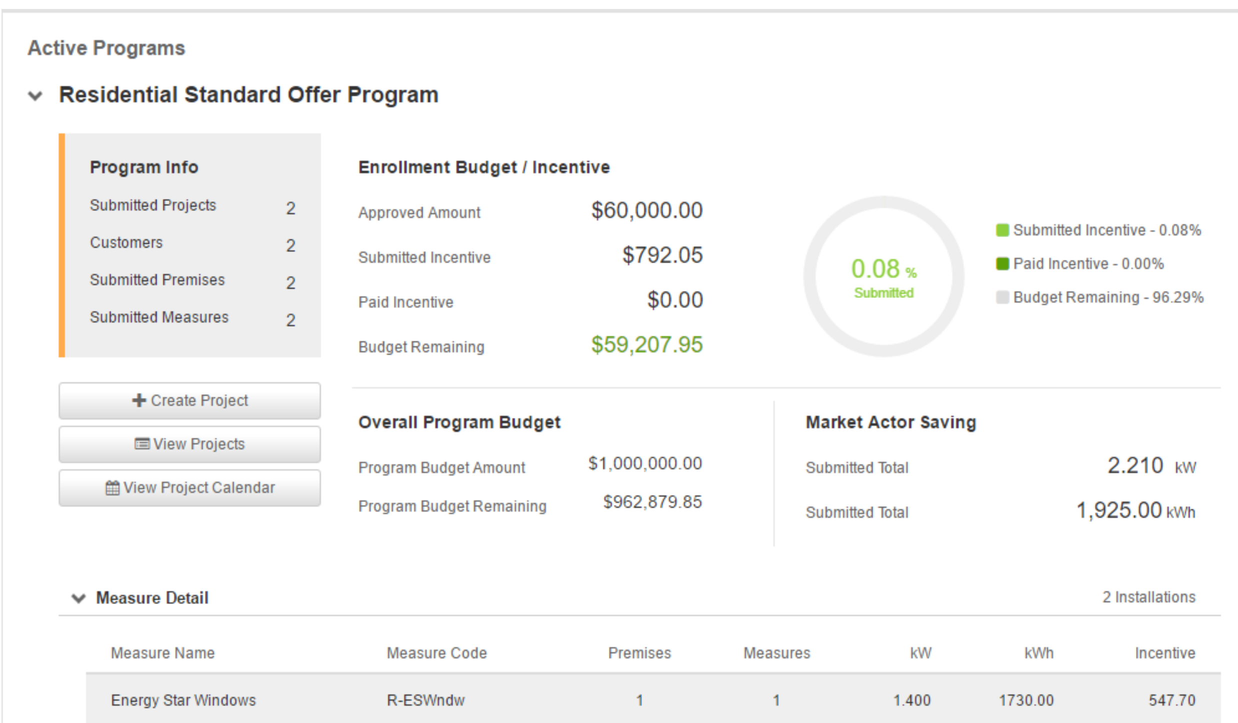
The Upcoming Work Schedule displays the next 3 work events associated with your account across all programs.



- Click on a ***Project name*** to be taken to that project
- Click on ***View Project Calendar*** to navigate to the project calendar

The Active Programs pane displays high-level program details for all programs that are accessible with the current credentials. For each program displayed, the overall counts for projects, customers, and premises and measures will be displayed.

Enrollment budget and Program budget information including utilized funds and budget remaining will be displayed along with a graphic display of the percentage budget that has been submitted and paid. Below the budget graphic display, the energy savings results will be displayed as submitted kW and kWh as well as the savings goals for the program.



- Click on ***Create Project*** to create a project for the program you are viewing.

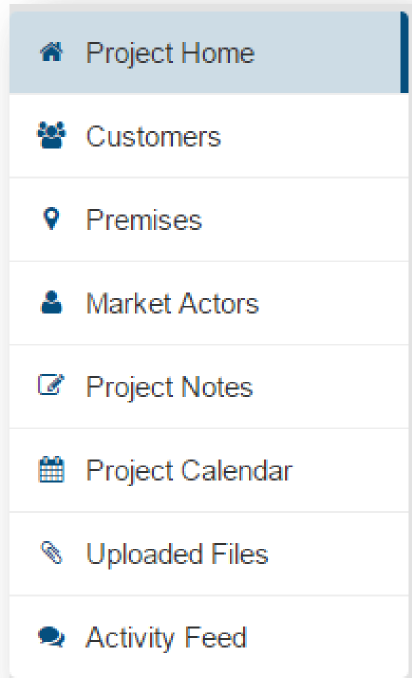
- Click on ***View Projects*** to be taken to the filtered Project List viewing only projects for the selected program.
- Click on ***View Project Calendar*** to be taken to the filtered Project Calendar viewing only work event items for the selected program

P3 Creating Projects

The P3 software platform places all work information, including customer, premises (sites), calendar information, measure information, document files and notes into Projects. The Project List will be the primary navigation screen to perform most common actions. Below are the various steps to create projects and move them through the process to final submittal.

Project Navigation

Projects have their own submenu to navigate by. Once you navigate to a project from the Project List, you will see the submenu on the left hand side.



The Customers tab will display customer information and is also where the premise information will be added.

The Premises tab contains premise (site) information and is where measures are added.

Project Home is the main project page and displays summary information from incentives, measures, customer information, and premise information.

Project Notes contain all notes relating to a project.

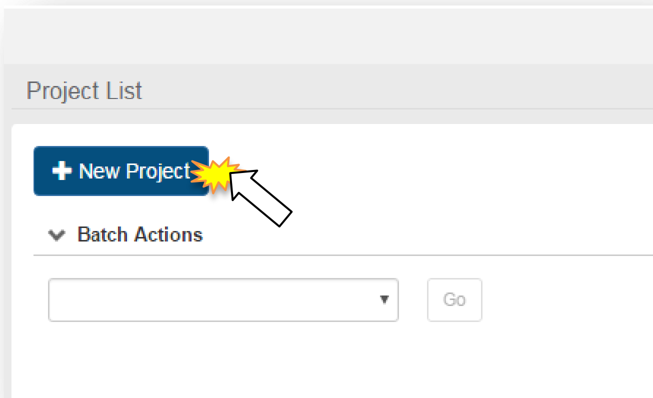
Project Calendar is where work schedules are added. Work Schedules are required for project authorization.

Uploaded Files is where all additional agreements, acknowledgements, field notes, and other required files are added to the project.

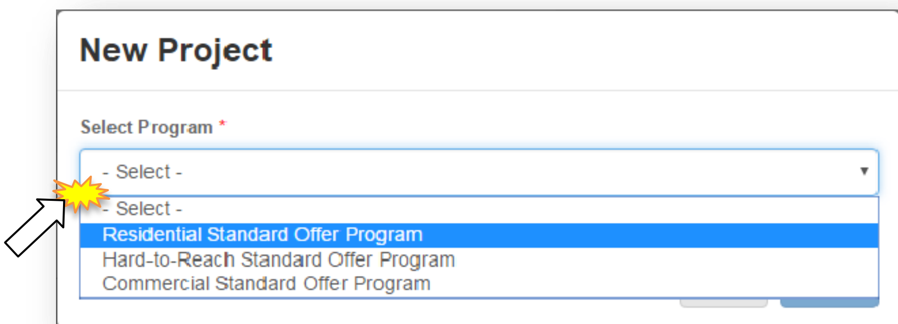
Please note*: all files uploaded are done so at a project level and relating a file to a specific premise or customer must be done via your own naming convention in the title field.*

Create New Project

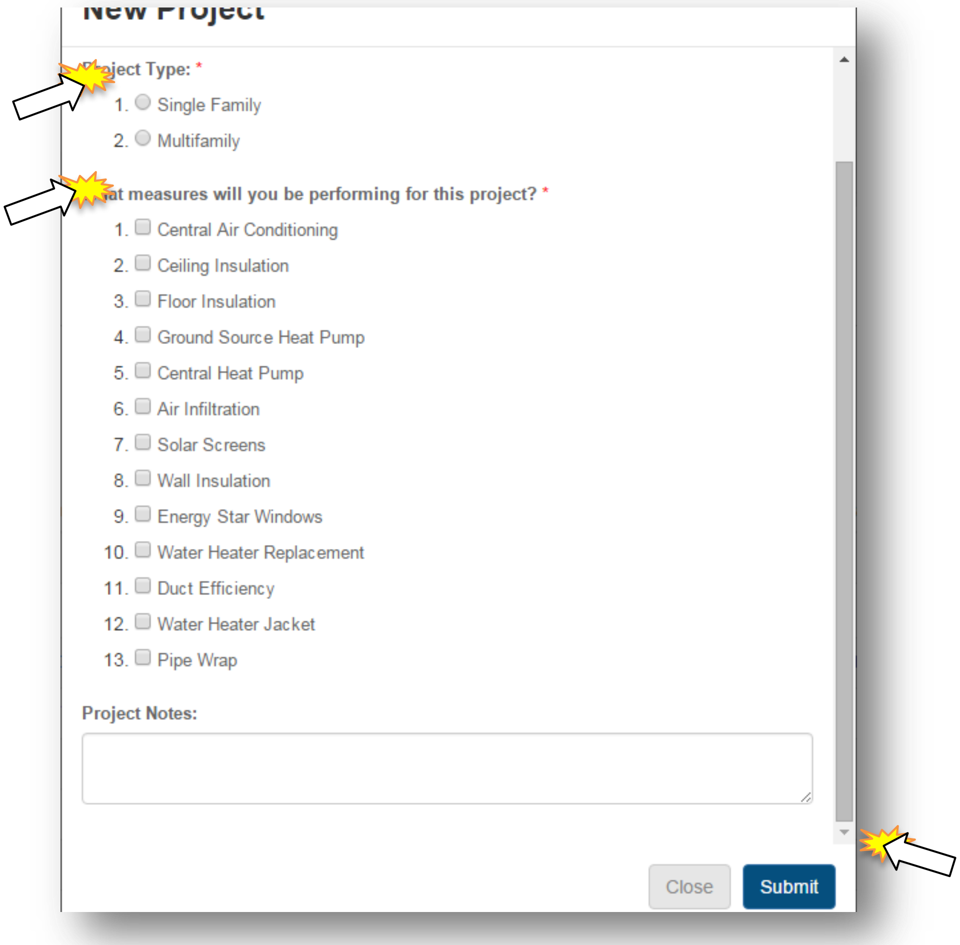
1. Log in as a Market Actor
2. Go to Projects -> Project List



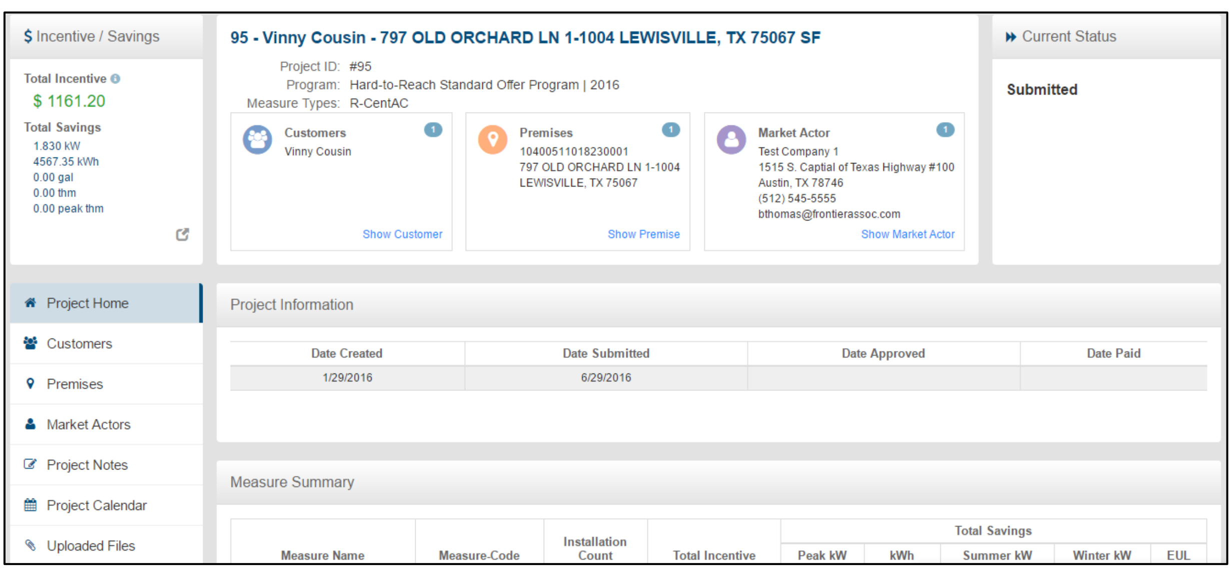
3. Click on the ***New Project*** button
   a. New Project box will appear
4. Select the applicable Program



5. Select the project type
   a. Single Family
   b. Multifamily
6. Select the *desired* measures to be performed
   a. ***Please Note:*** The measures displayed reflect all available program measures regardless of what you were approved for at the Enrollment stage. Please refer to your Enrollment Approval email for a list of your approved measures.
7. Enter any notes about the project

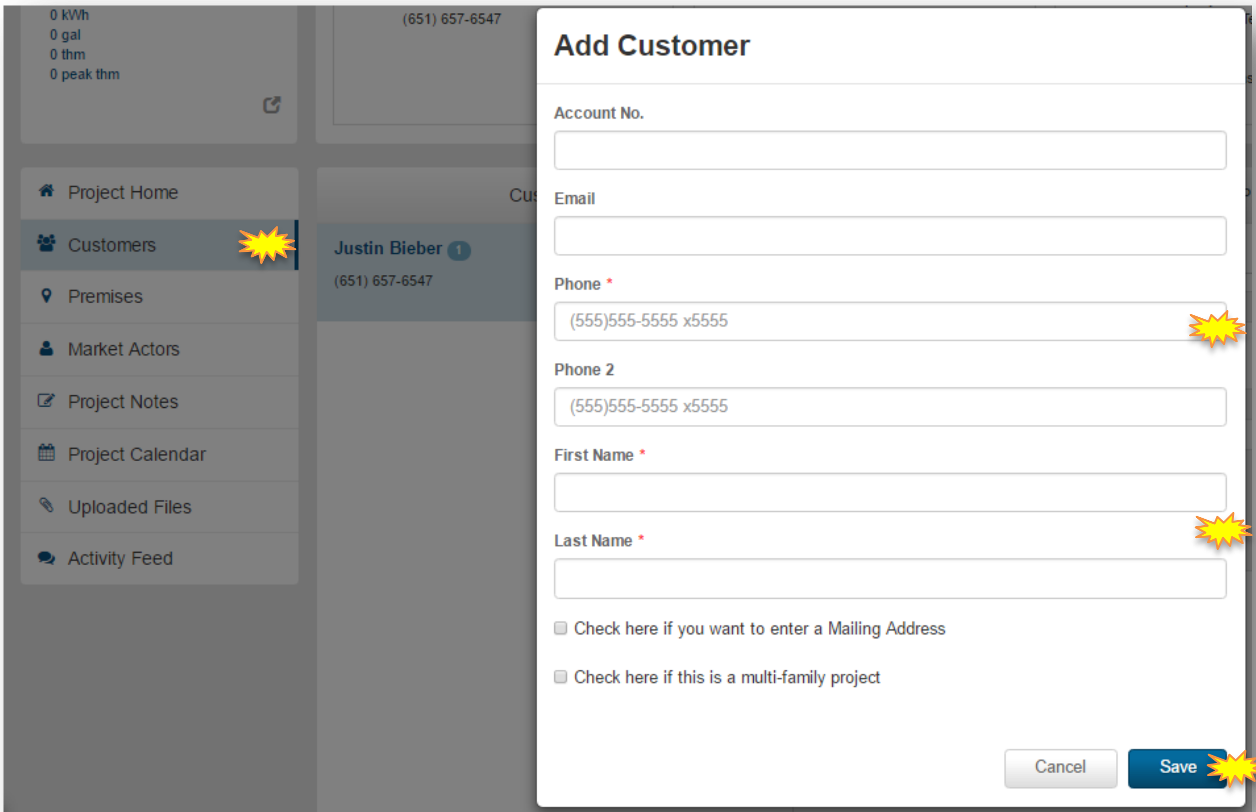


8. Click ***Submit***
   a. New project home page will appear:



Add Customer

1. Click the ***Add Customer*** link
    a. Add Customer modal will appear

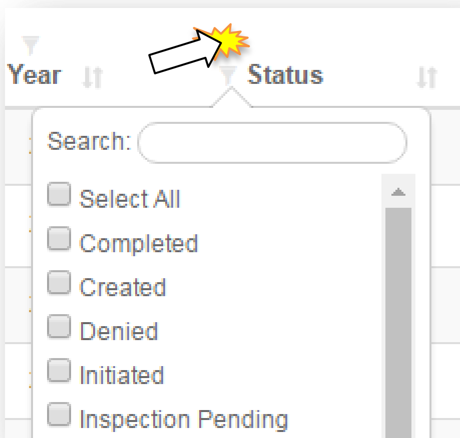


2. Enter all required information
3. Is a separate mailing address needed?
    a. Yes – Fill out all information required for the separate mailing address
    b. No – ignore checkbox
4. Is the project a Multifamily project?
    a. Yes – Fill out all required community information fields that appear
    b. No – ignore checkbox
5. Click ***Save***

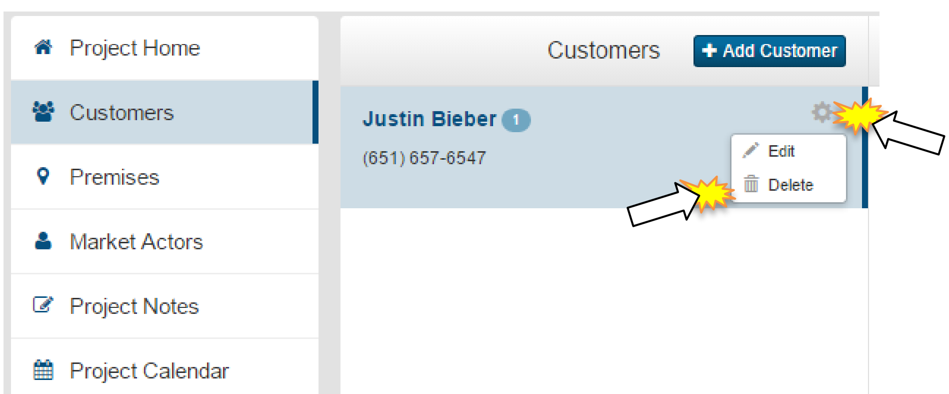
Edit Customer

Customer data can be edited while the project is in Created and Work Completion Pending statuses. Customer data is unable to be edited while waiting on Administrator approvals.

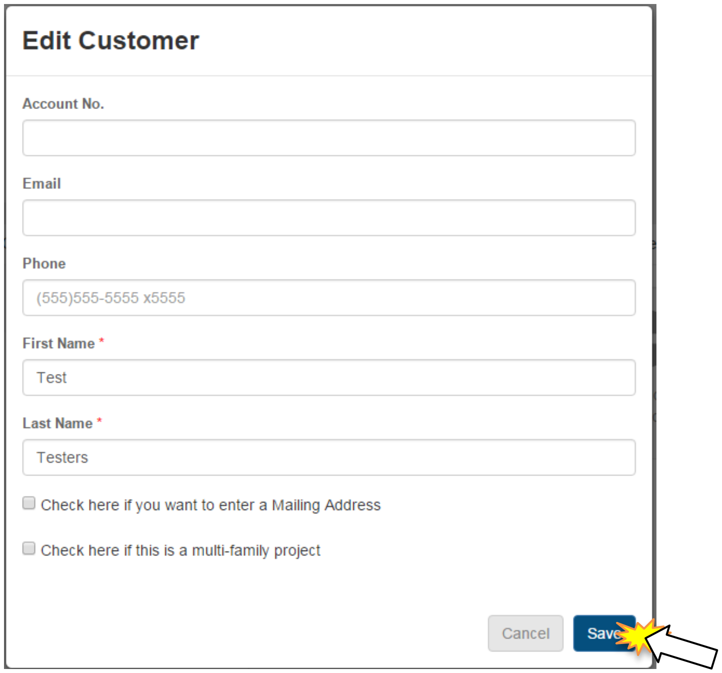
1. Log in as a Market Actor
2. Navigate to a Created or Work Completion Pending project in the project list.
    a. You may use the filter options at the top of each column to narrow the visible projects.



3. Click on the Customer tab
4. In the Customer selection, click the drop-down menu in the top right corner



5. Select ***Edit***
    a. Edit Customer modal will appear
6. Make desired changes

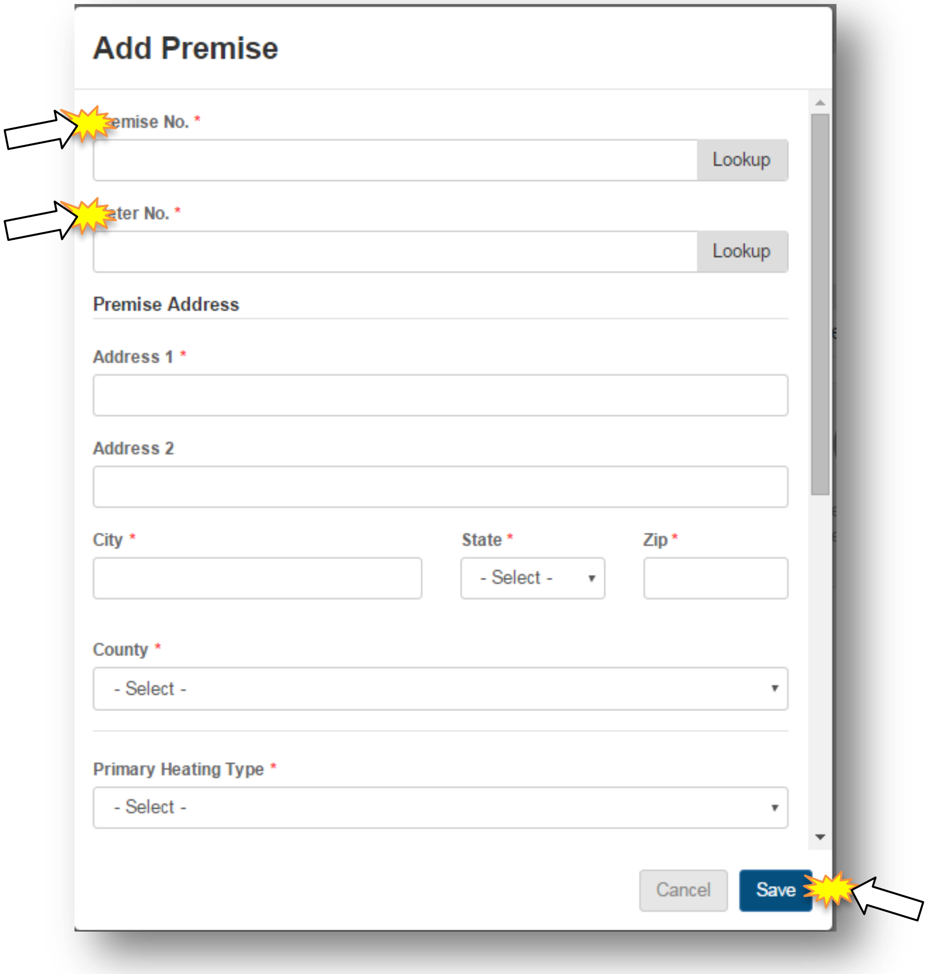


7. Click ***Save***

Adding a Premise

1. Go to Customers tab
2. Click on the ***Add Premise*** button

3. Is the project multifamily? ***Please note***: If Multifamily was not chosen at the beginning, it will not be considered by the system to be a multifamily project
   a. No – enter all required information for the project premise
   b. Yes – Premise information should be pre-populated

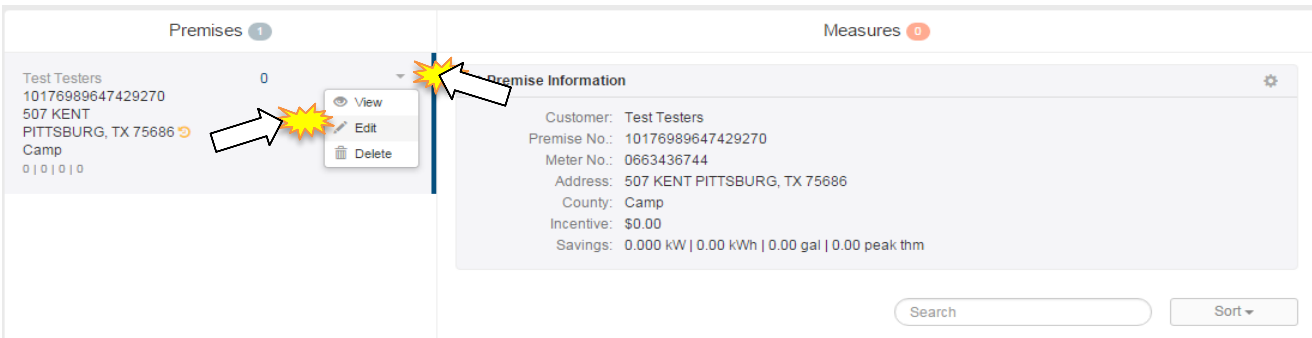


4. Required fields are: Premise no., Meter no., Address 1, City, State, Zip, County, Heating Type, Cooling Type, Water Heating Type, Year Built, and Building Type.
5. Click ***Save***
6. Is the project multifamily?
   a. No – See next section
   b. Yes – Click on the Add Premise button and repeat steps 3 & 4

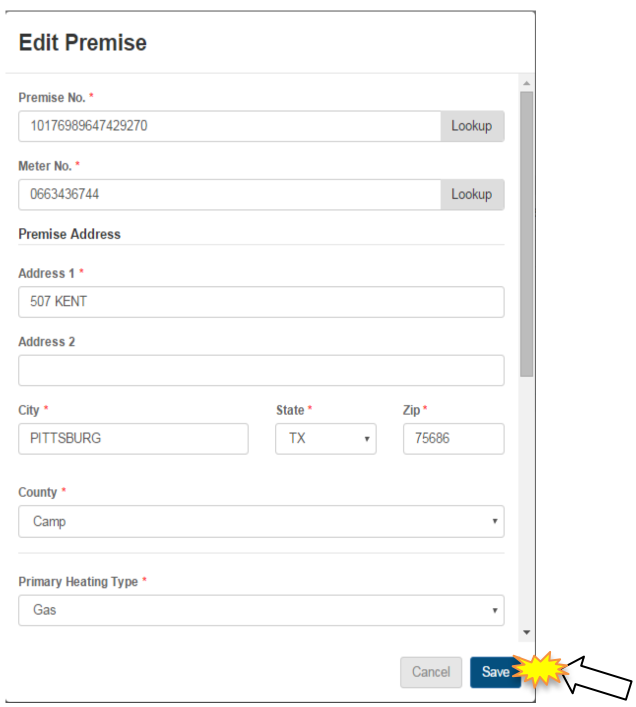
Edit Premise

Premises can be edited while the project is in Created status only. Once Project Authorization has been requested, the option will no longer appear.

1. Go to the Project List
2. Select a project
3. Click on the Premises tab
4. In the Premise selection, click the drop-down menu in the top right corner



5. Select ***Edit***
    a. Edit Premise modal will appear
6. Make desired changes

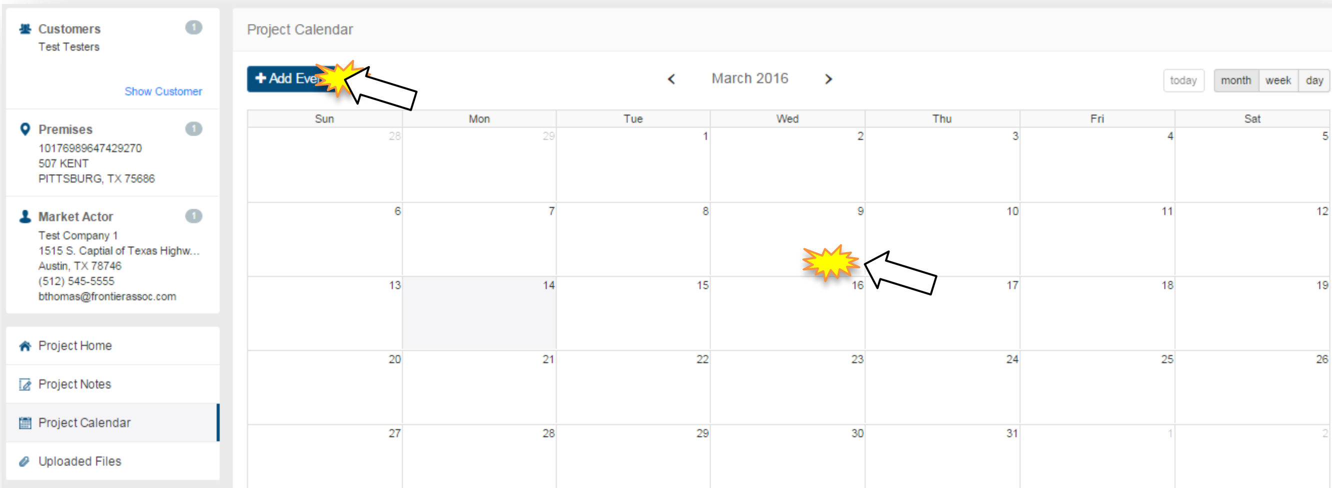


7. Click ***Save***

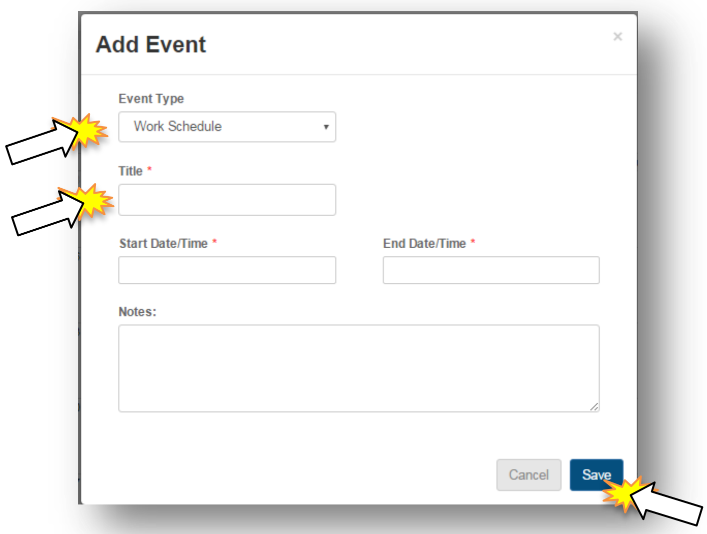
Add Work Schedule to Project Calendar

Work Schedules are a required item in order to request project authorization.

1. Go to Project Calendar
2. Add a Work Schedule
    a. Either click the ***Add Event*** button or
    b. Select a date and time frame using the mouse on the calendar itself



3. Enter a work event title
4. Enter a date and time, if not pre-populated
5. Enter any notes and click ***Save***

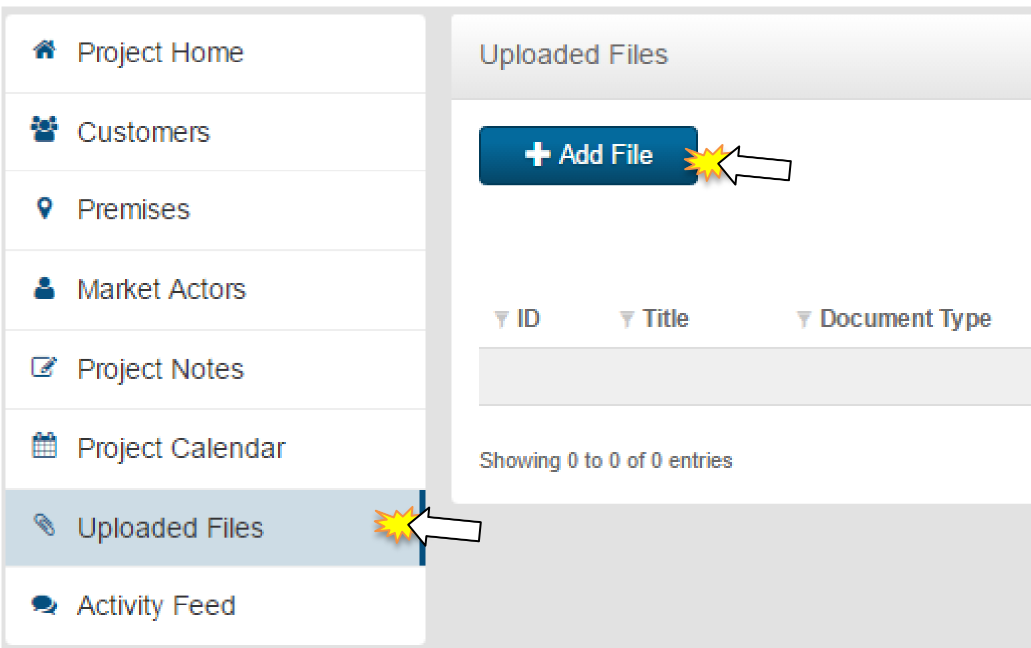


Required Project Documents

There are two types of document uploads for Projects. Project Documents are general documents that pertain to the project (photos, misc. documents) and are utility-specific. Premise Documents apply to any documentation associated with the Premise (Host Customer Agreements, Field Notes etc.). Please see your Utility specific Program Guide for more information and a list of the required documents.

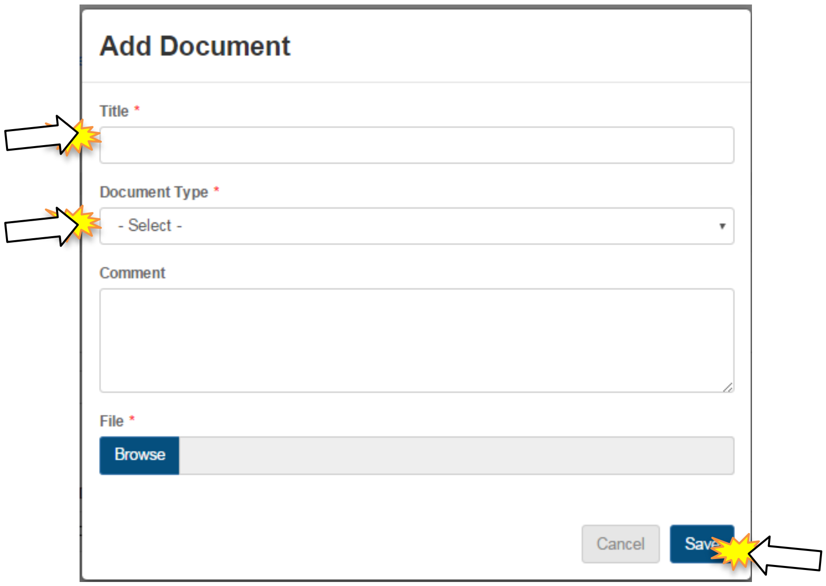
General Project Document Upload

1. Navigate to the Project List
2. Select a project
3. Click on the ***Uploaded Files*** tab at the bottom left



4. Click on the ***Add File*** button

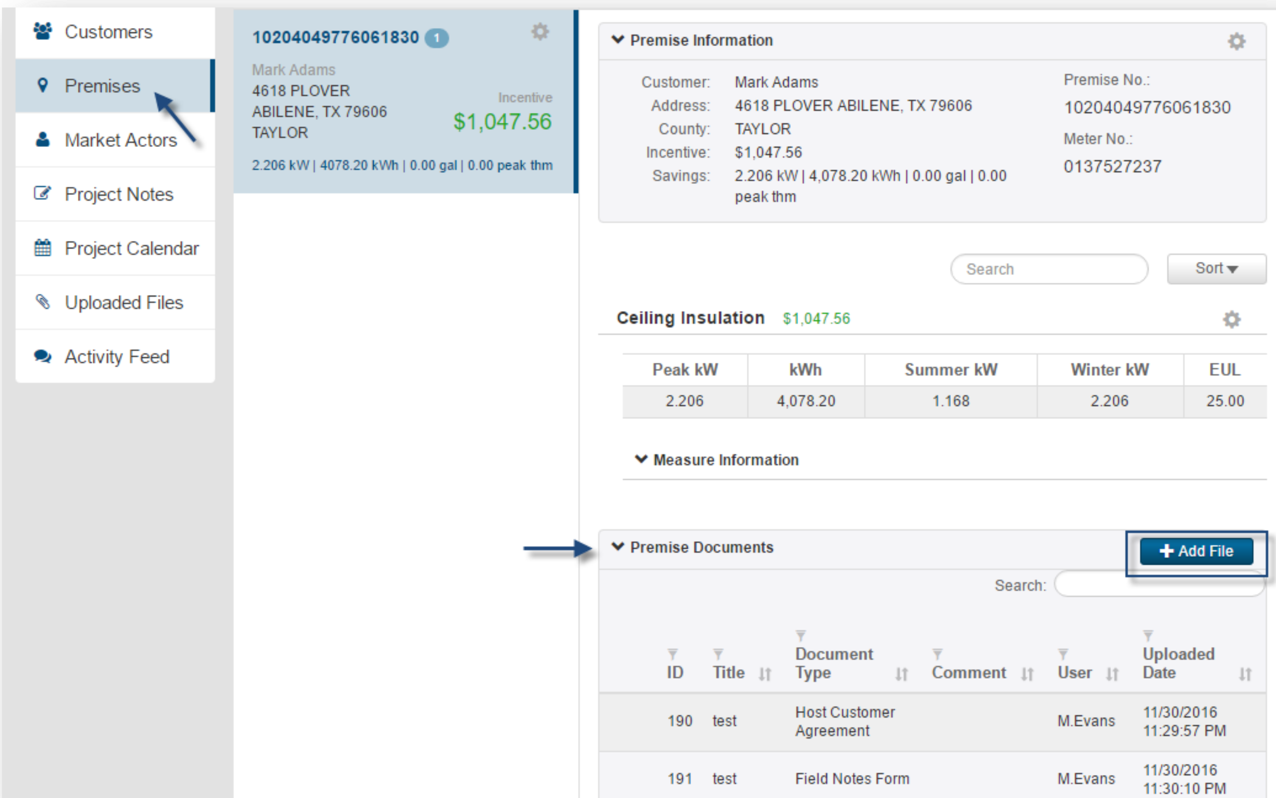
5. Enter title information
6. Select File Type
7. Enter any notes related to the file
8. Click ***Browse*** and select the file to Upload



9. Click ***Save***

Premise Document Upload

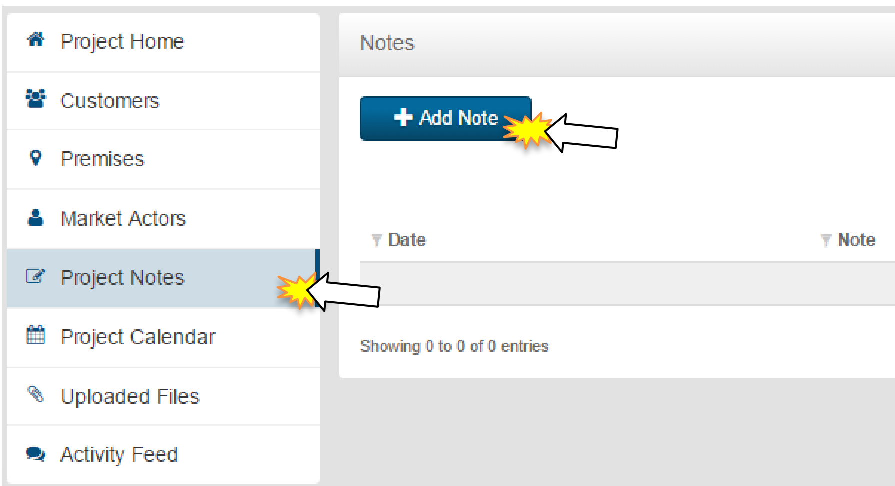
1. Navigate to the Project List
2. Select a project
3. Click on the ***Premise*** tab at the bottom left
4. Premise Document Upload is associated with each premise entered
    a. Multi-Family projects with more than one premise will require premise documents uploaded for each premise per the Utilities Program Manual.



Creating Project Notes

Project Notes, like Project Documents, are made at the Project level. Any notes added should contain the same or similar naming conventions as project documents to identify and relate the notes back to specific premises or customers.

1. Navigate to the Project List
2. Select a project
3. Click on the Project Notes tab at the bottom left



4. Click on the ***Add Note*** button
   a. Add Note modal will display
5. Enter note information
6. Click ***Save***
   a. Note will display in the Project Notes section

Request Project Authorization

Projects can be submitted for approval if the following information has been provided:

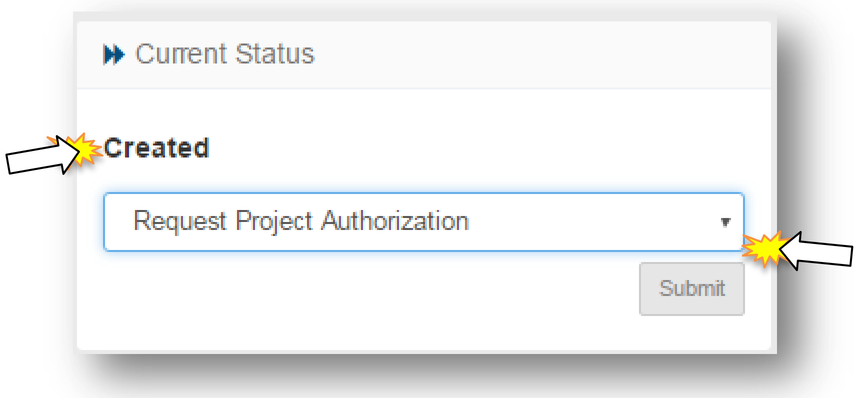
- Customer information
- Premise (1+) information
- Work Schedule
- Required Project documents (varies depending upon Utility requirements)

Projects will require Pre-Approval if any of the following criteria is met:

- Project is a Multi-Family project
- Project premise(s) have historical records associated with them

Follow the steps below to request Project Authorization:

1. Confirm Project Customer, Premise, and Work Schedule are all filled out
2. Go to the Current Status box at the top right of the project page
3. In the drop-down menu, select Request Project Authorization
4. Click the ***Submit*** button
   a. Confirmation of request project authorization will appear
   b. Project status will change to either Pre-Approval Pending or Work Completion Pending



5. You will receive an automated confirmation email.

If all information is entered and the project does not require administrator approval, the project will move directly into Work Completion Pending status. If the project requires approval, it will enter into Pre-Approval Pending status. Once an administrator has reviewed the project details, the project will be approved, denied, or sent back for more information.

Project Denied/Sent Back

Projects may be denied or sent back by utility administrators due to a variety of reasons. You will receive an automated email if and when these actions take place that will contain administrator notes on why the project was sent back or denied.

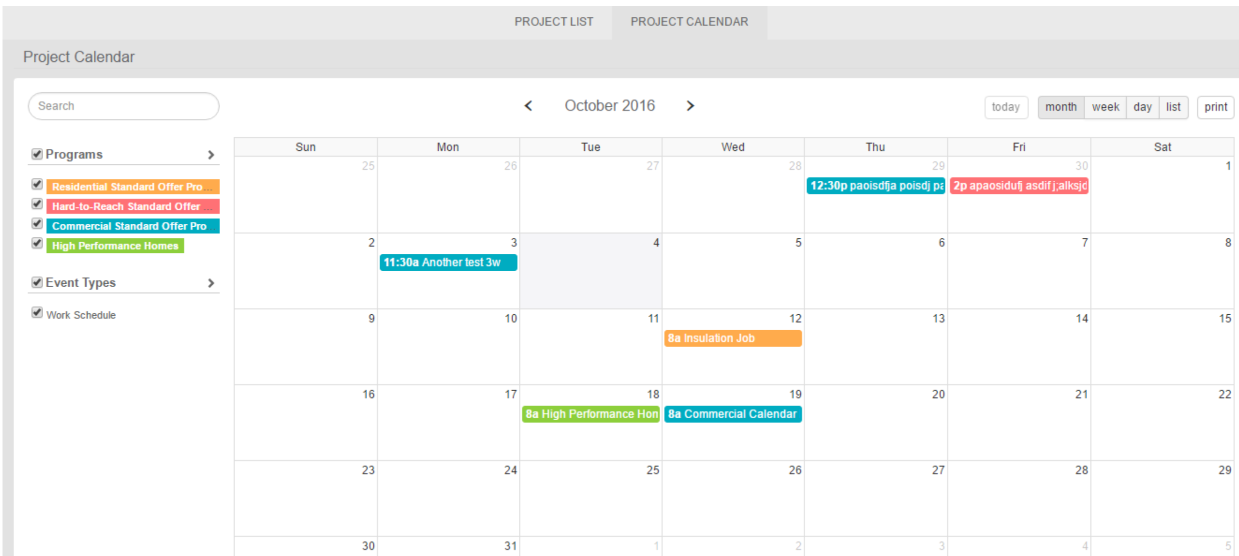
If a project is denied, you may contact the utility to determine if next steps are necessary.

If a project is sent back, please review the notes on the project. If steps are taken to remedy the issues with the project, the project may be re-submitted by the Market Actor for another review.

PROJECT CALENDAR

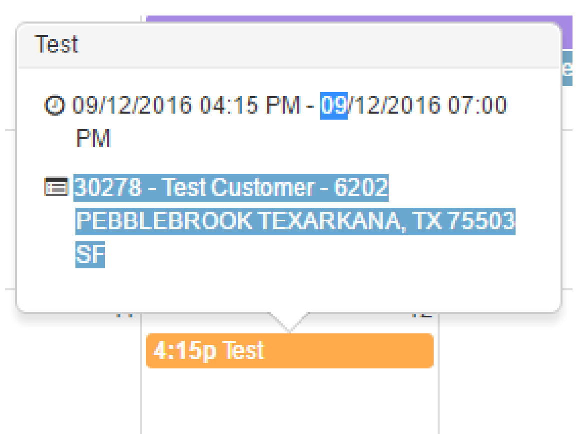
The Project Calendar is a tool that allows Market Actors to see all their project calendar entries in one consolidated calendar page. The Project Calendar has 4 views available – Month (default), Week, Day, and List.

To navigate to the project calendar, simply log in as a Market Actor and click on ***Projects***. Then click on the ***Project Calendar*** sub-menu item.



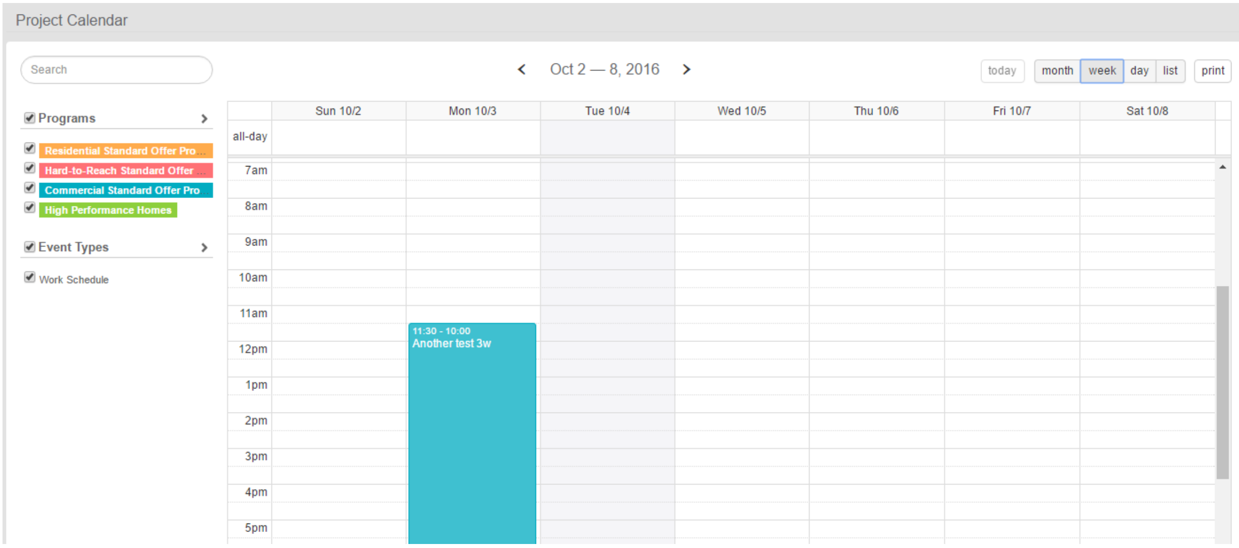
As a default view, the month calendar will display will all programs selected. If you are enrolled in specific programs, only those programs and their applicable work events will display.

Click on a ***Work Calendar Event*** to view more details. The exact time and project name will display on a pop-up box in the calendar. Click on the ***Project Name*** to open the project detail page in another tab.

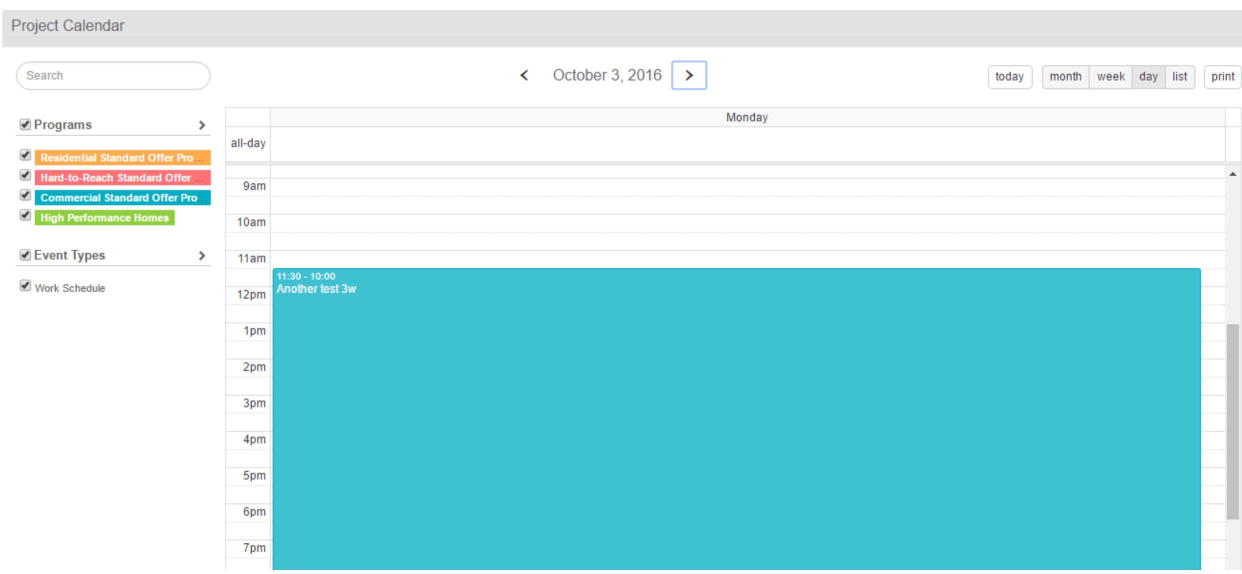


To view the other calendar items, simply click on the view desired at the top left of the calendar pane.

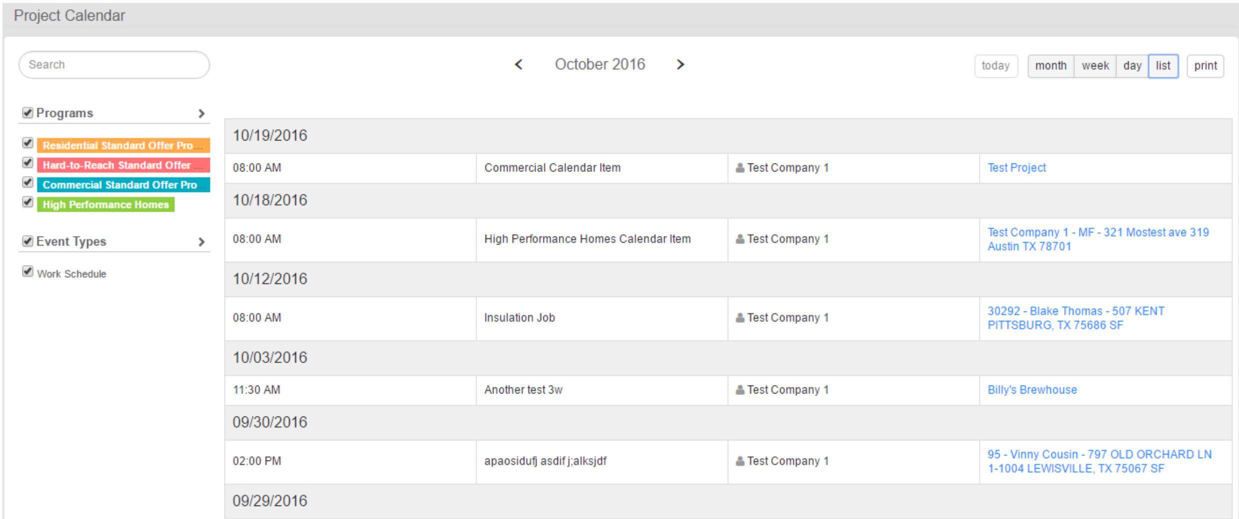
Click ***Week*** to view the calendar in a week-long view.



Click ***Day*** to view the calendar for a single day.



The calendar can also be viewed as a list of entries. The entries can be clicked on to take the user to the project detail pages. Click ***List*** to view the calendar in list mode.

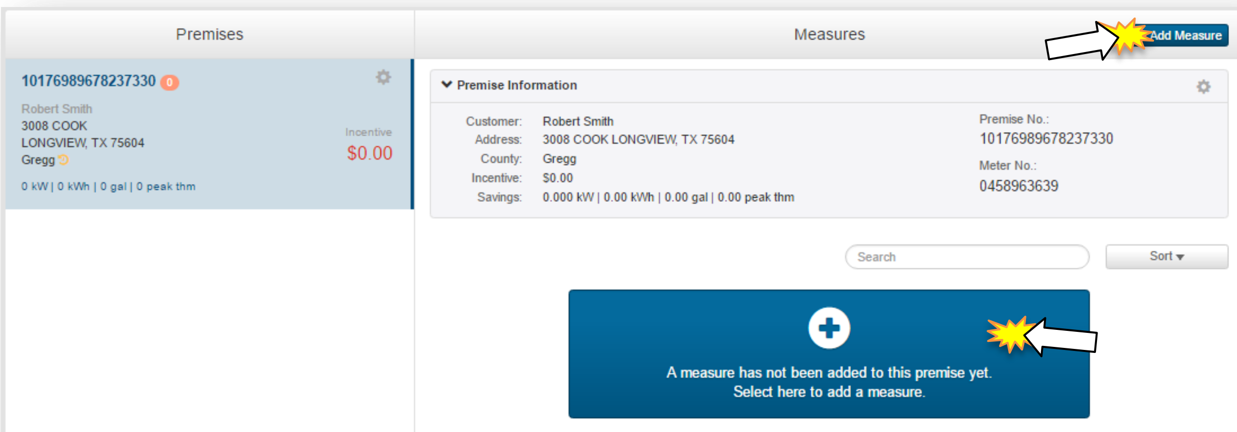

Project Calendar
Search
October 2016
today
month
week
day
list
print
Programs
Residential Standard Offer Pro
Hard-to-Reach Standard Offer
Commercial Standard Offer Pro
High Performance Homes
Event Types
Work Schedule
10/19/2016
08:00 AM
Commercial Calendar Item
Test Company 1
Test Project
10/18/2016
08:00 AM
High Performance Homes Calendar Item
Test Company 1
Test Company 1 - MF - 321 Mostest ave 319 Austin TX 78701
10/12/2016
08:00 AM
Insulation Job
Test Company 1
30292 - Blake Thomas - 507 KENT PITTSBURG, TX 75686 SF
10/03/2016
11:30 AM
Another test 3w
Test Company 1
Billy's Brewhouse
09/30/2016
02:00 PM
apaosidufj asdif j;alksjdf
Test Company 1
95 - Vinny Cousin - 797 OLD ORCHARD LN 1-1004 LEWISVILLE, TX 75067 SF
09/29/2016

P3 Work Completion Pending

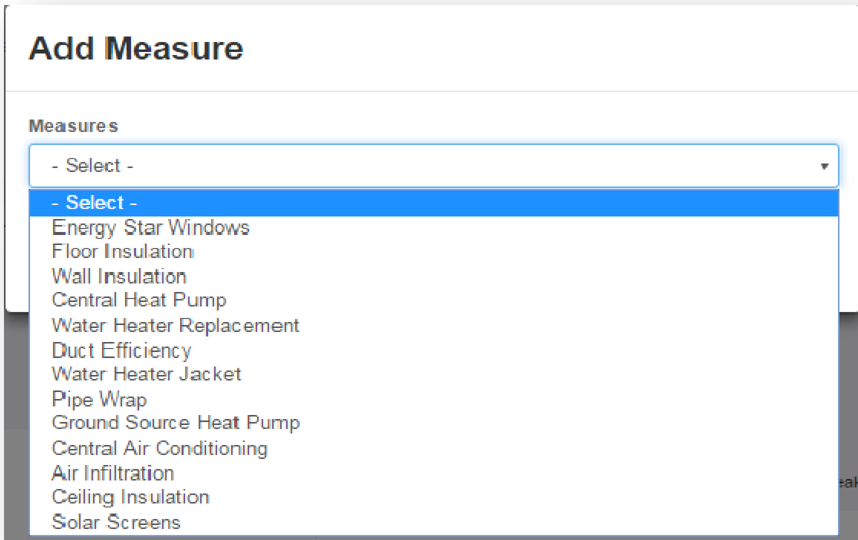
Measures can be added to each premise in a project after the project has entered the Work Completion Pending Status. The measures available will be dependent entirely upon what has been approved for the market actor at the program enrollment level, and what has been approved for that project. For example: a market actor may be approved for central air conditioning installation, but a premise for a project may have historical records associated with it that show that measure was performed not that long ago. If the administrator does not approve that measure for the property, it will not display as an option to enter.

Adding Measures

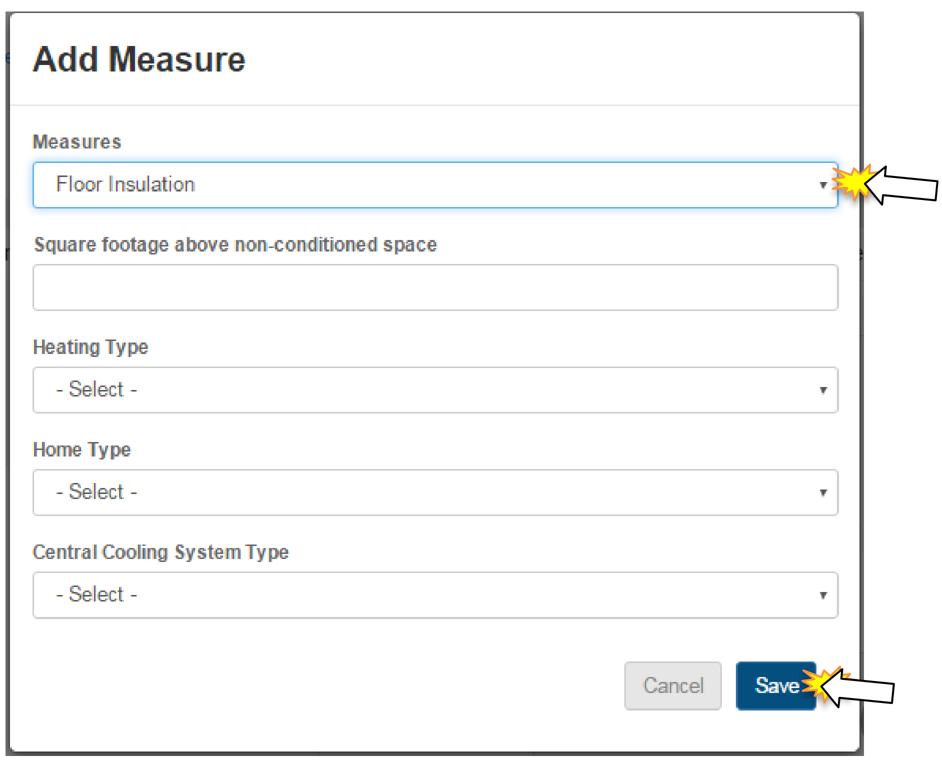
1. Navigate to the Project List
2. Select a project that is in Work Completion Pending status
3. Click on the Premises tab
4. Click on the ***Add Measure*** button
    a. Add Measure modal will appear



5. Select the measure to add
    a. Once selected, the information fields relating to that measure will appear below



6. Enter all information

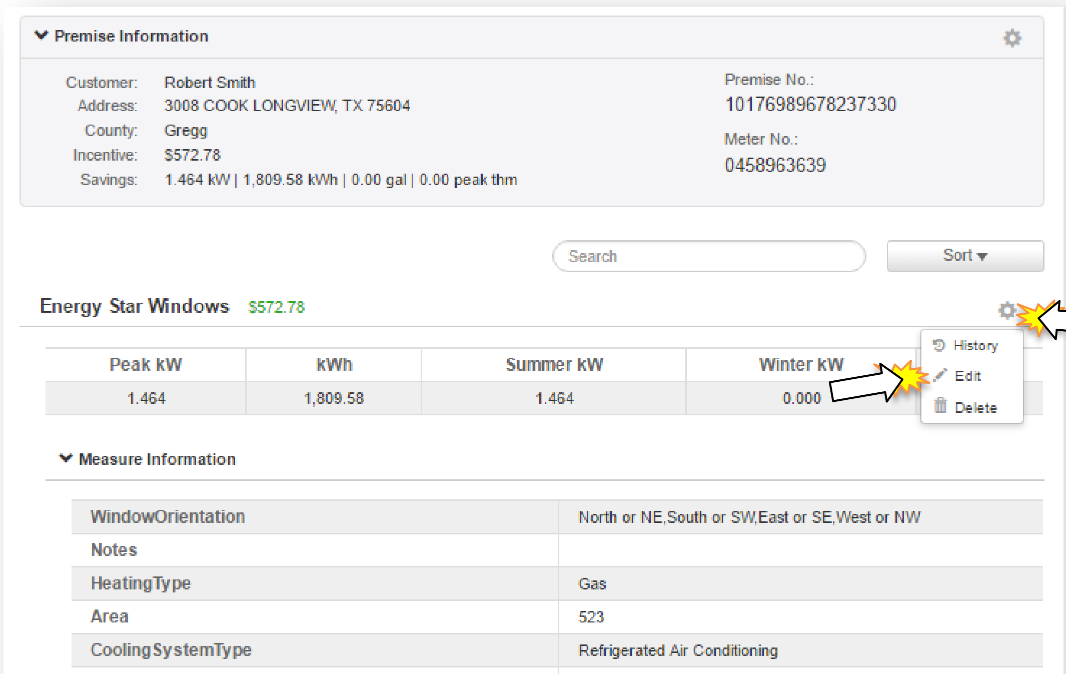


7. Click ***Save***

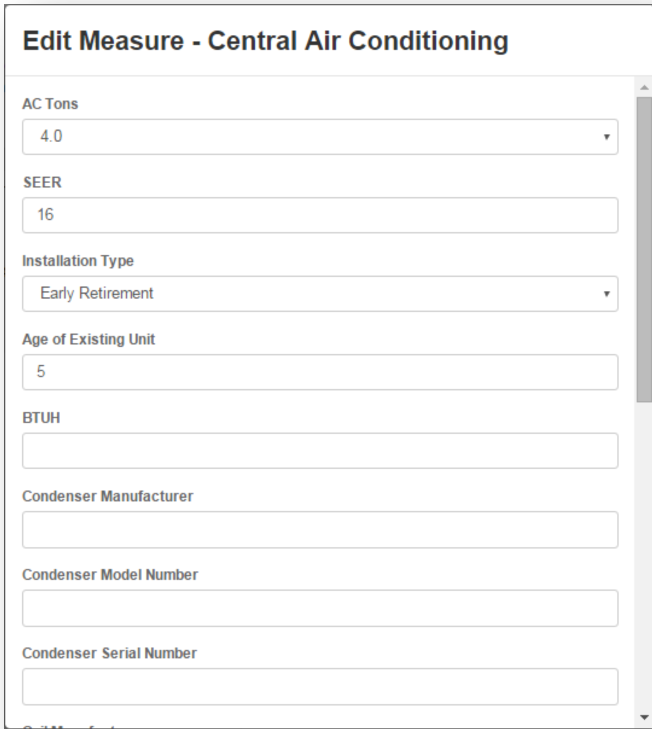
8. Measure information should appear under the premise information with all kW, kWh savings, and the incentive amount

Editing/Updating a Measure

1. Navigate to the Project List
2. Select a project that is in Work Completion Pending status
3. Click on the Premises tab
4. Select a measure to edit and click on the gear icon associate with it



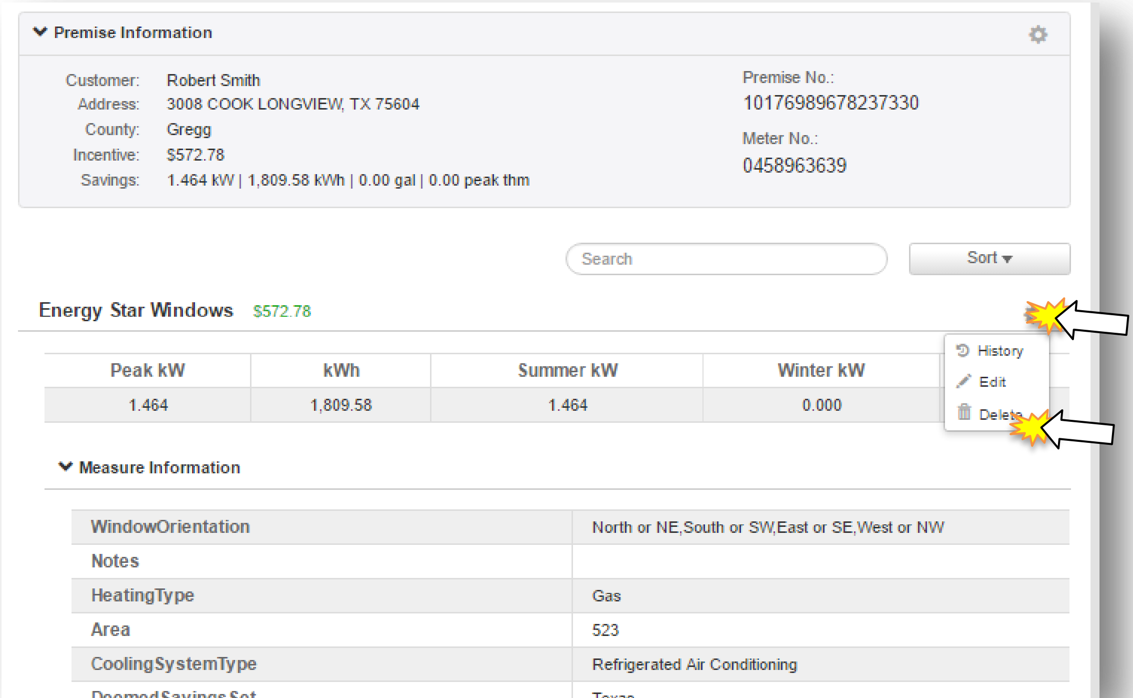
5. Click ***Edit***
    a. Edit Measure modal will appear
6. Make changes to measure information



7. Click ***Save***
    a. kW, kWh, and incentive amount will all update based on the new information

Deleting a Measure

1. Navigate to the Project List
2. Select a project that is in Work Completion Pending status
3. Click on the Premises tab
4. Select a measure to edit and click on the gear icon associate with it



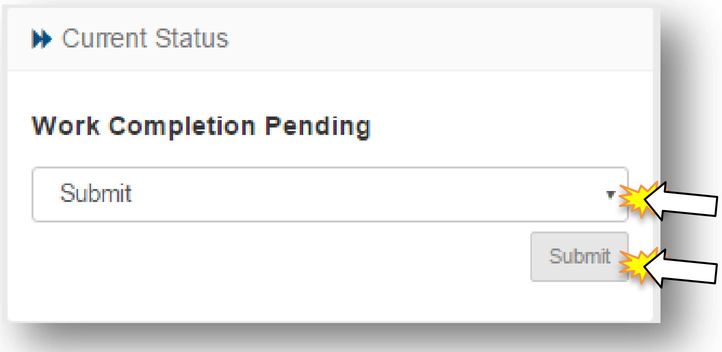
5. Click ***Delete***
    a. Delete Measure modal will appear
6. Click ***Delete***
    a. Measure will no longer appear on that premise information

P3 Requesting Final Approval

Requesting Final Approval is generally the final step that Market Actors take before the project is completed. The utility administrators will handle the project from the Submitted stage through the invoicing stage until it is marked as Completed.

Project Submittal

1. Confirm Project measures for each premise are completed
2. Go to the Current Status box at the top right of the project page
3. In the drop-down menu, select Submit
4. Click the ***Submit*** button
   a. Submission of project confirmation will appear
   b. Project status will be Submitted

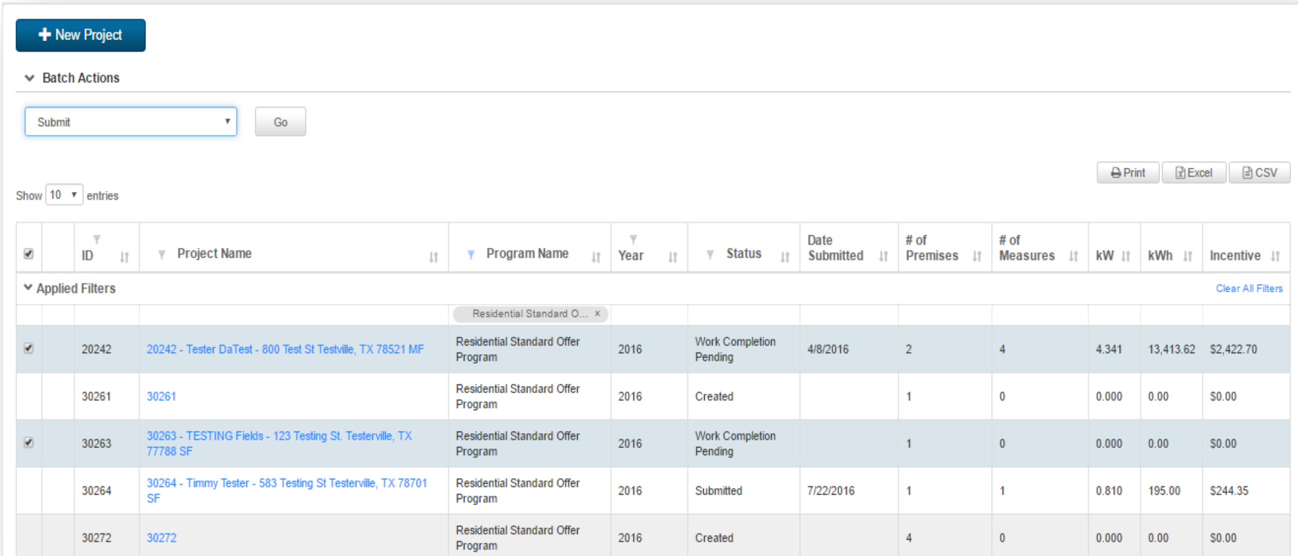


5. You will receive an automated email confirmation of Project submission.

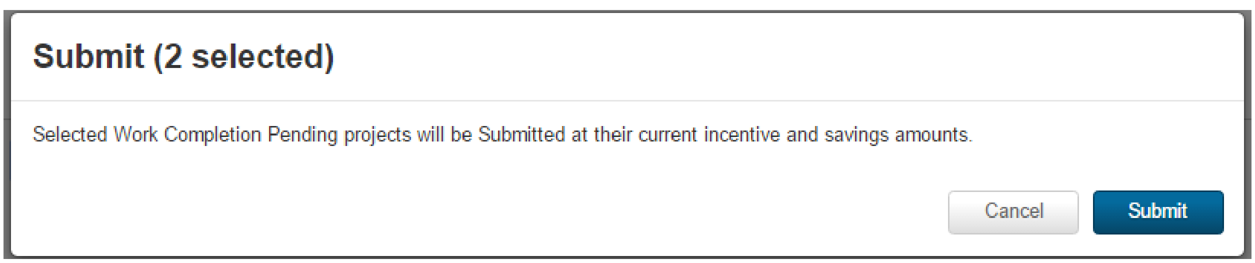
Depending on the information entered, the project may be flagged for Pre-Approval. Projects will be flagged if they are Multi-Family, the Premise Build Date is outside of the program parameters, or if the project is flagged as potentially having the same measures performed in the history.

Market Actors – Submitting Projects via Batch Actions

1. Navigate to the project list
2. Filter the list to only include Res/HtR projects and only projects in Work Completion Pending status
3. Ensure all projects displayed have all required information needed to be submitted
4. Select the projects desired to be submitted
5. Click on the Batch Actions drop down menu
6. Choose Submit
7. Click Go



8. A modal will display that states what the batch action will accomplish
9. Click Submit
10. Confirmation will appear



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