



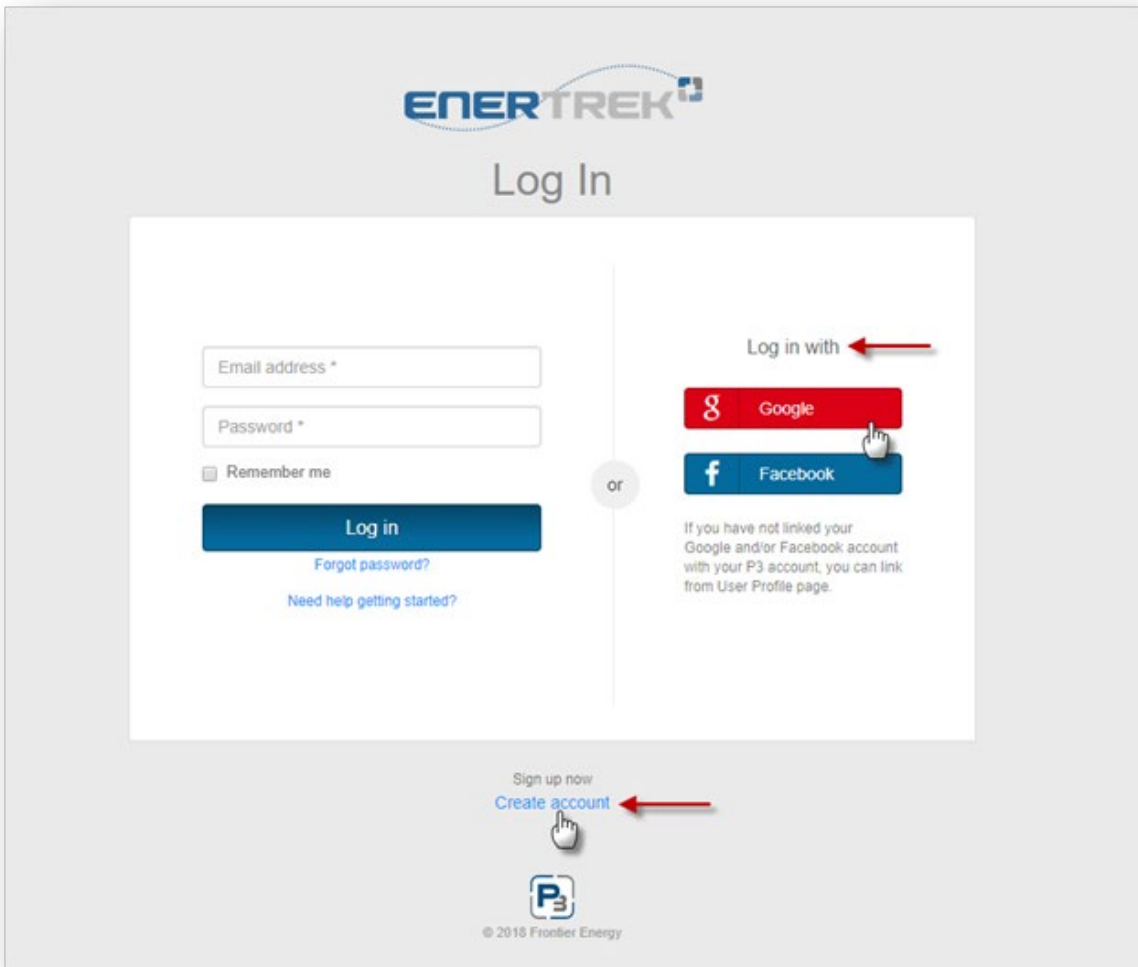
# P3 USER GUIDE FOR MARKET ACTORS HVAC RESIDENTIAL PROGRAM

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# Cleco P3 Registration Process

1. Navigate to: Cleco.p3.enertrek.com
2. There are three different ways to register in P3:
  - a. Standard registration using your email address
  - b. Registration linking your existing Google account
  - c. Registration linking your existing Facebook account



## Standard P3 registration with email address

3. Click the Create account link in blue
4. Enter all required 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

ENERTREK

### Sign up

First name \*

Last name \*

Email address \*

Password \*

Confirm password \*

Sign up

By signing up, you agree to the [Terms of Use](#)

[Need help getting started?](#)

Sign up with

Google

Facebook

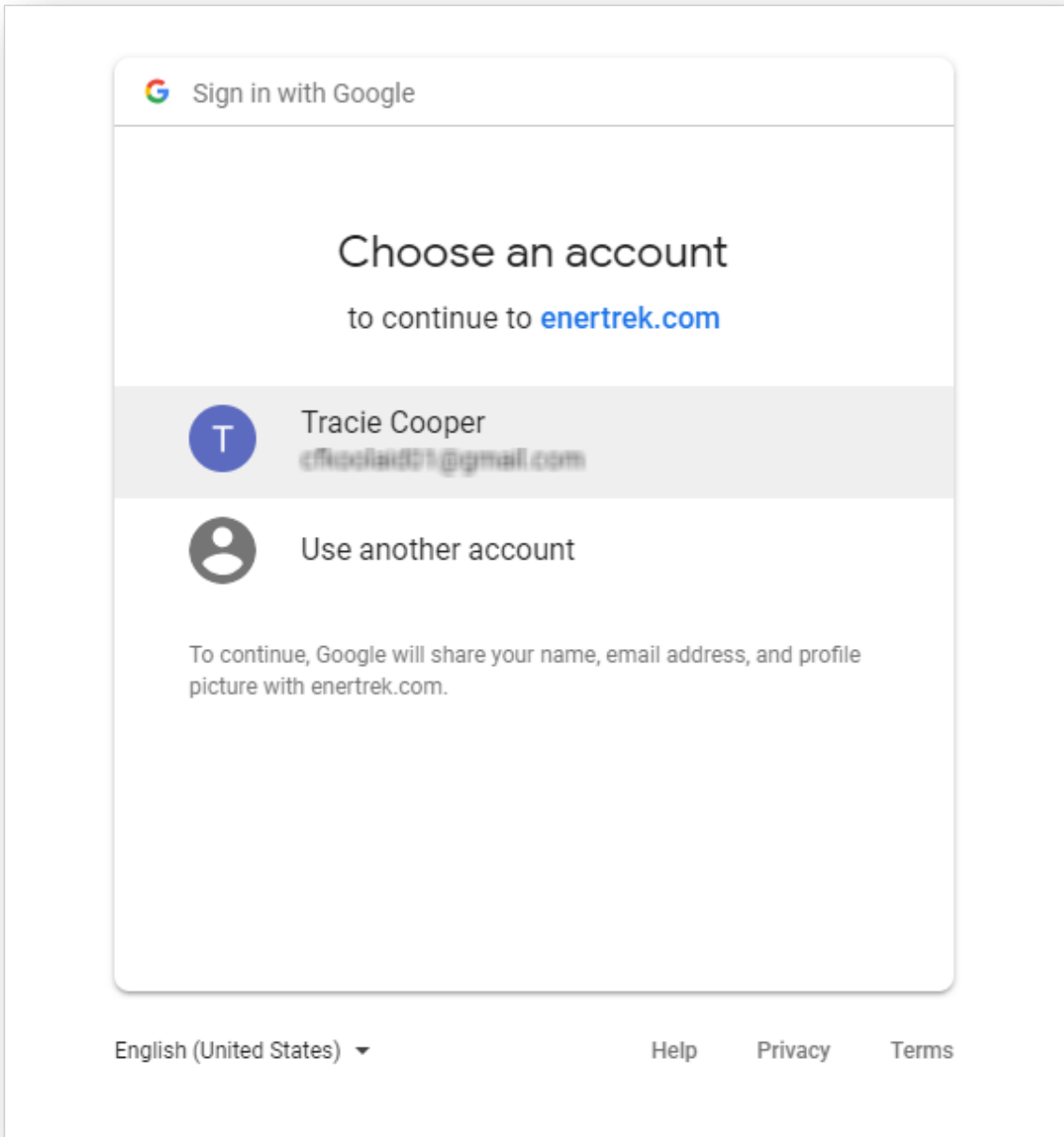
You can sign up P3 with your Google and/or Facebook account.

Have an account? [Log in](#)

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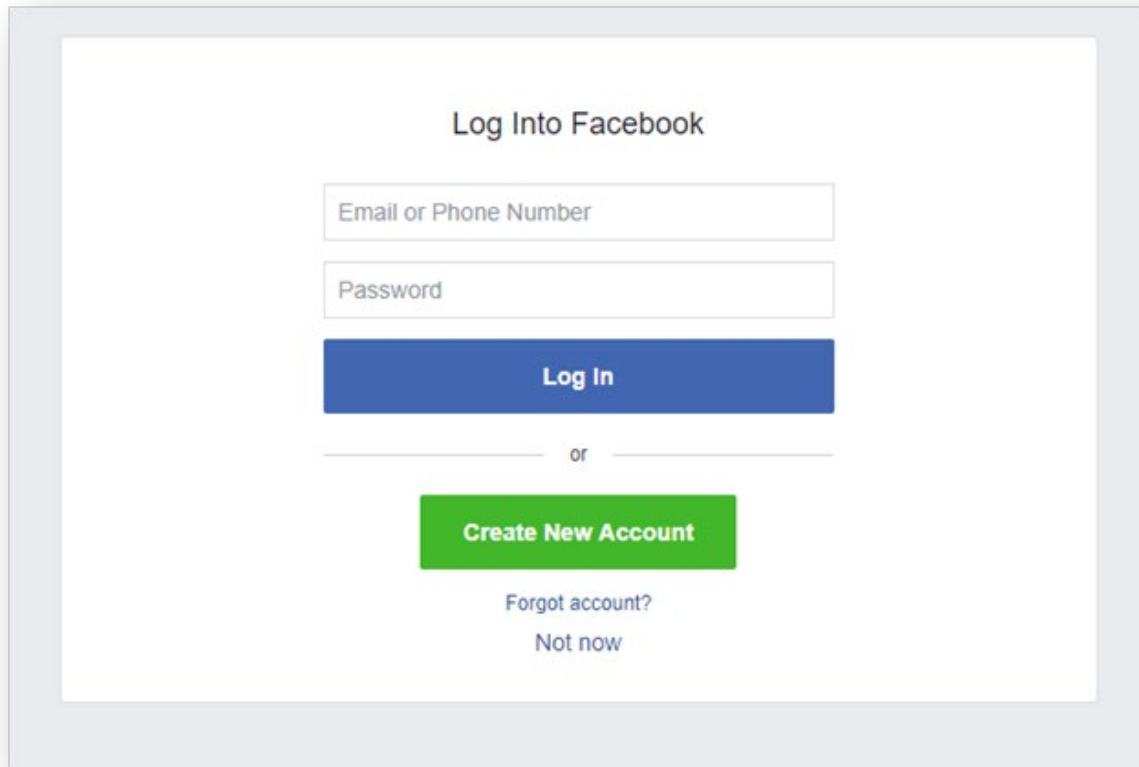
## P3 Registration via Google Account

1. You will need to enter your Google account username and password
  - a. Once your account is linked to P3 you will use these credentials to log in to P3



## P3 Registration via Facebook

1. You will need to enter your Facebook account username and password
  - a. Once your account is linked to P3 you will use these credentials to log in to P3

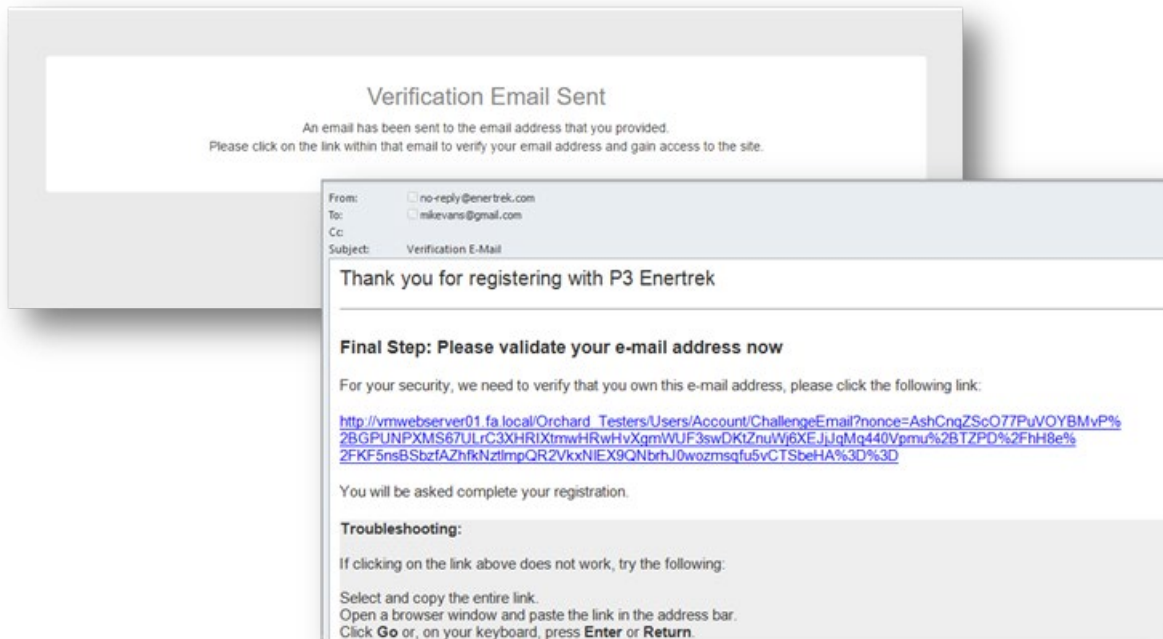


## Email validation

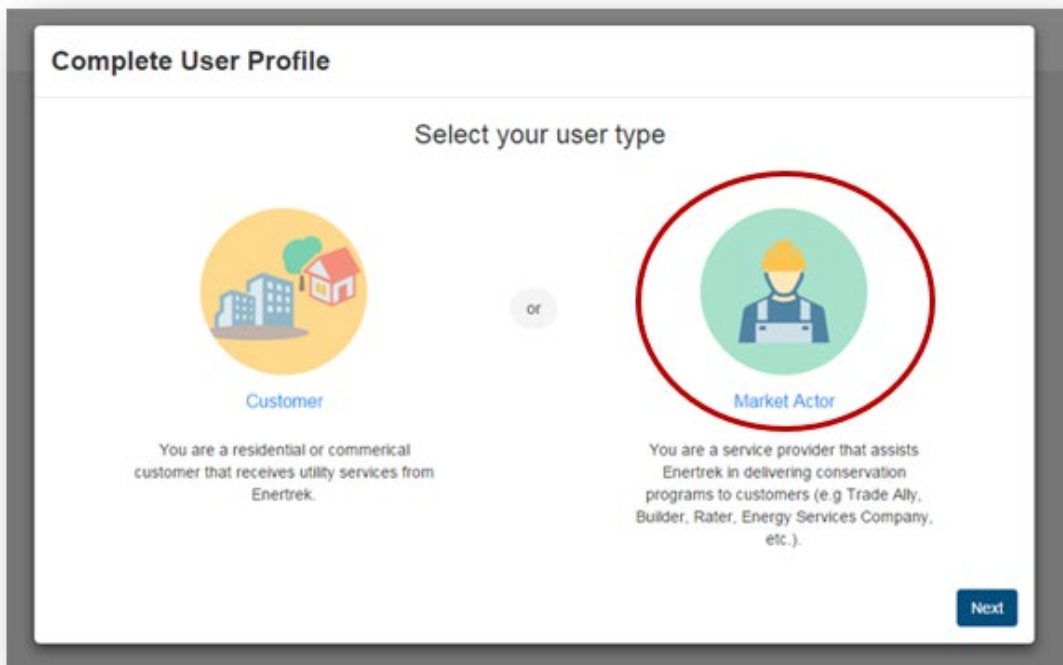
Regardless of which registration process you use; a verification email will be sent to the email address provided. Please check your spam/junk folders if you do not receive this email within 5 minutes

## P3 Company Profile Creation – Market Actor

1. Registered P3 users will receive a verification email to confirm the email address provided. Users will be prompted to select the link provided in the email to complete their P3 User Profile



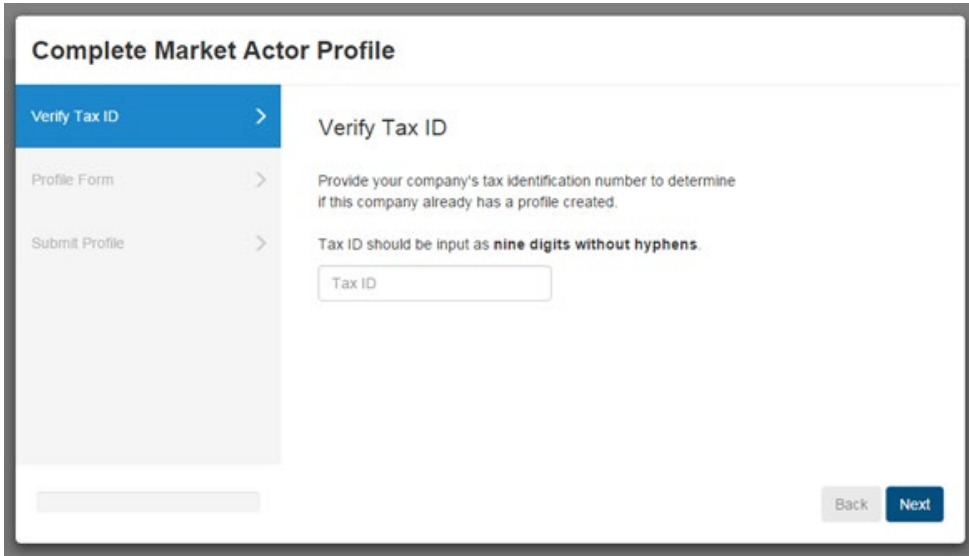
2. Upon clicking the link provided, users will be taken to the Cleco P3 database and asked to select the User type associated with their profile
  - a. Select the **Market Actor Icon**
  - b. Click the Next button





## Complete Market Actor Profile

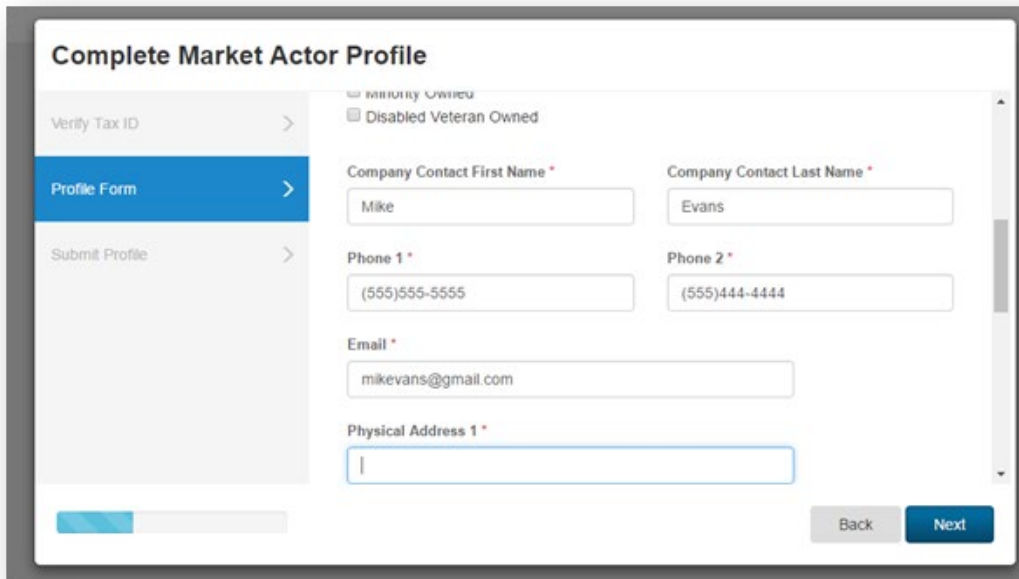
1. Enter your Companies Tax ID click the Next button



The screenshot shows the 'Complete Market Actor Profile' page. On the left is a navigation menu with three items: 'Verify Tax ID' (highlighted in blue), 'Profile Form', and 'Submit Profile'. The main content area is titled 'Verify Tax ID' and contains the following text: 'Provide your company's tax identification number to determine if this company already has a profile created.' Below this is a note: 'Tax ID should be input as **nine digits without hyphens.**' A text input field labeled 'Tax ID' is present. At the bottom right are 'Back' and 'Next' buttons.

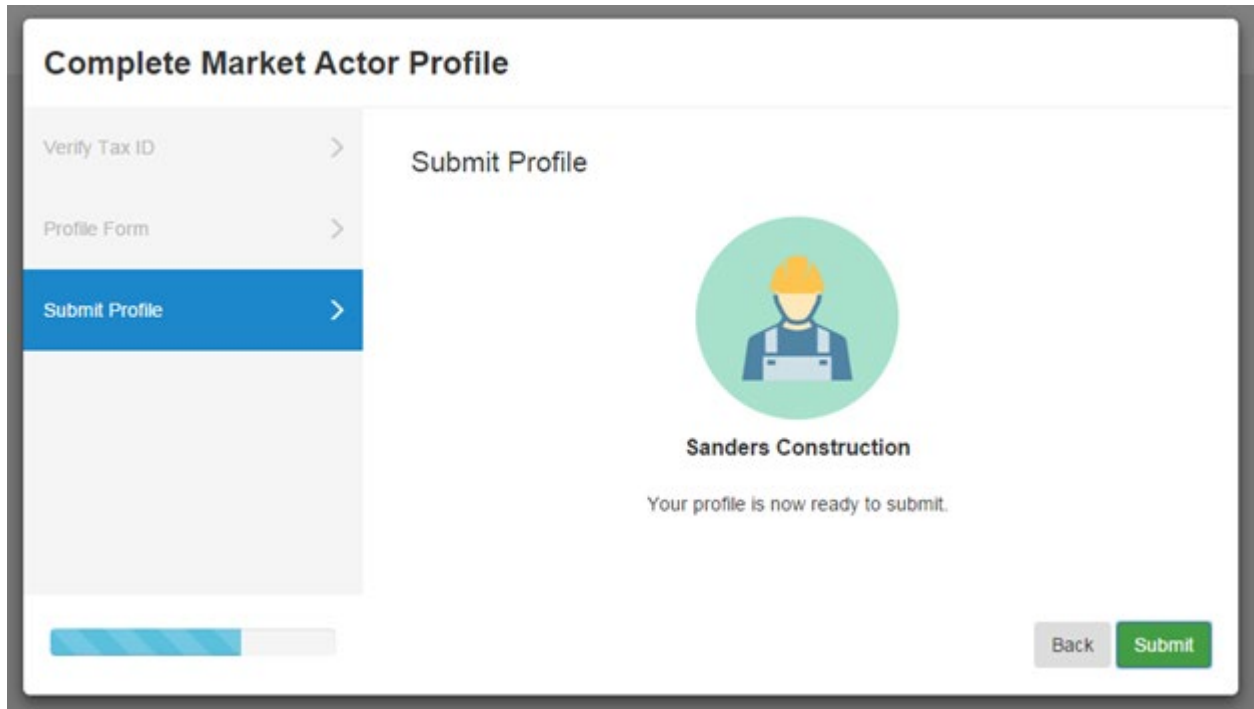
*\* Please note: If Tax ID entered already exists you will be provided a link to the individual that has registered your business with P3*

2. Provide Additional Company Information
  - a. Please note that all required fields are indicated with a red asterisk
  - b. Select the Next button to continue



The screenshot shows the 'Complete Market Actor Profile' page with the 'Profile Form' step selected in the navigation menu. The main content area contains several fields: 'Company Contact First Name \*' (filled with 'Mike'), 'Company Contact Last Name \*' (filled with 'Evans'), 'Phone 1 \*' (filled with '(555)555-5555'), 'Phone 2 \*' (filled with '(555)444-4444'), 'Email \*' (filled with 'mikevans@gmail.com'), and 'Physical Address 1 \*' (empty). There are also checkboxes for 'Minority Owned' and 'Disabled Veteran Owned'. At the bottom right are 'Back' and 'Next' buttons.

3. Click the Submit button to finish the Market Actor Profile set-up

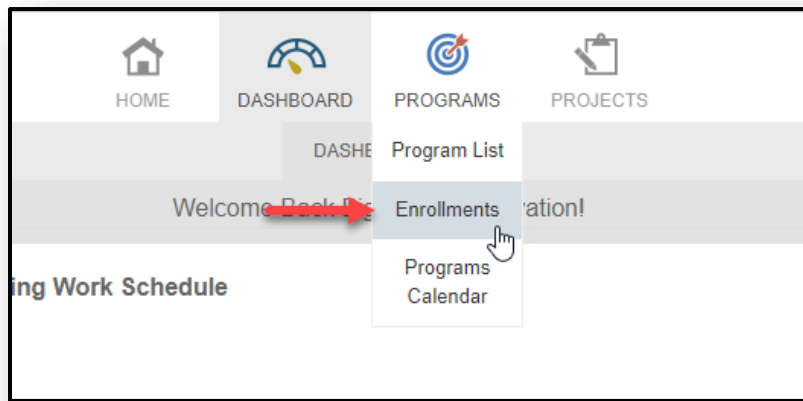


# Cleco HVAC Enrollment Application

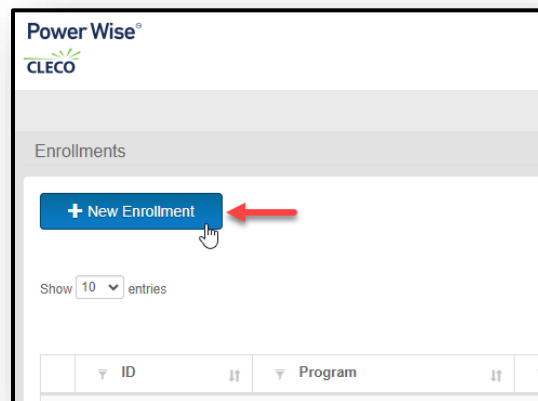
All HVAC contractors must first complete an enrollment application and be Approved for participation in the program.

Follow the steps below to complete the application:

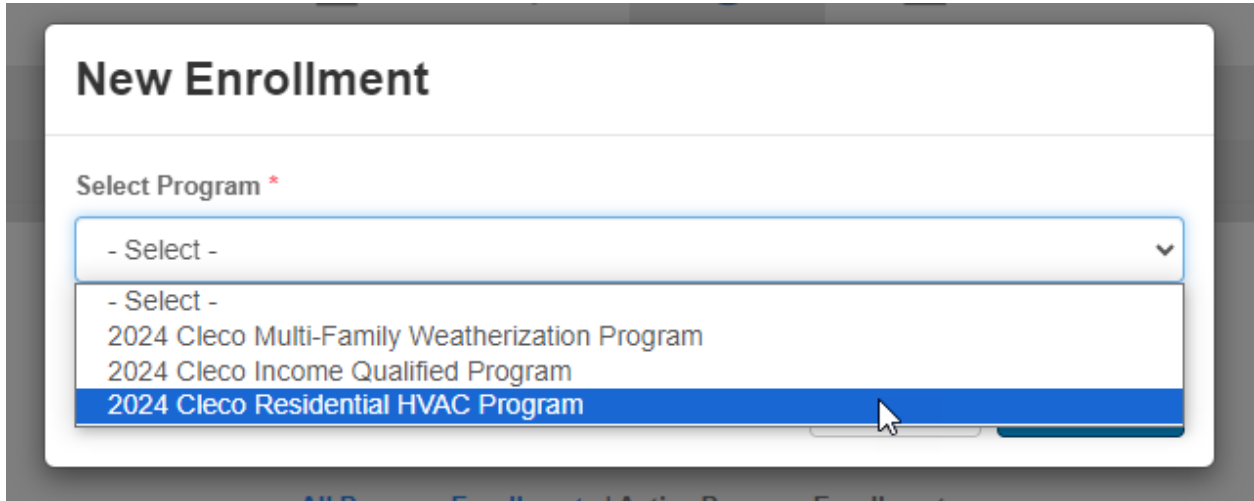
1. Navigate to the Programs tab on the top Navigation toolbar
  - a. Select Enrollments from the drop-down menu



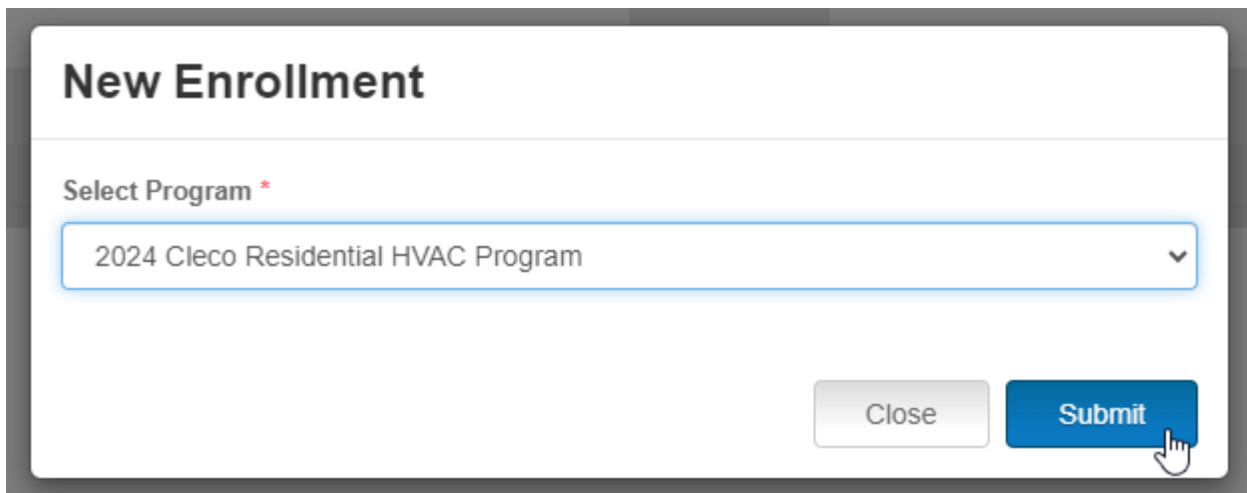
2. The Enrollments table will load
  - a. Click on the + New Enrollment button in blue



- 3. The new enrollment modal will appear
  - a. Select the 2024 Cleco Residential HVAC Program from the drop-down menu



- b. Click Submit



- 4. The HVAC Program application will load
- 5. All required fields will be indicated with a red asterisk \*

Cleco Residential HVAC Program Application

All required fields must be filled out in order for the application to be saved. To come back and fill out information later or if a field is not applicable, input "N/A".

(\* denotes a required field)

Comments - For Admin Use Only

**Target Customers**

Please select your target customers. \*

- 1.  Single Family
- 2.  Income Qualified

**Measure Types**

What measures will you install under this contract? Please check all measures that will be installed as part of this project. \*


- 1.  Central Air Conditioning (SEER2)
- 2.  Central Heat Pump (SEER2)

**Disclosure**

- 6. If you wish to participate in the **Income Qualified HVAC program**, please select the checkbox in the Target Customers section
  - a. Otherwise select Single Family only as your target customer

**Target Customers**

Please select your target customers. \*

- 1.  Single Family
- 2.  Income Qualified 


- 7. Click Submit to submit the application for Program Approval
- 8. Click Save to save the enrollment application and return to complete it another time

**Marketing - Please choose one of the following for your Marketing Plan:**

By selecting this option, I acknowledge that I have uploaded flyers, brochures, door hangers, or any other promotional material that I intend on using in promotion of the Cleco Power Wise Programs. I understand the marketing materials cannot be used until it is approved by Cleco Power Wise™.

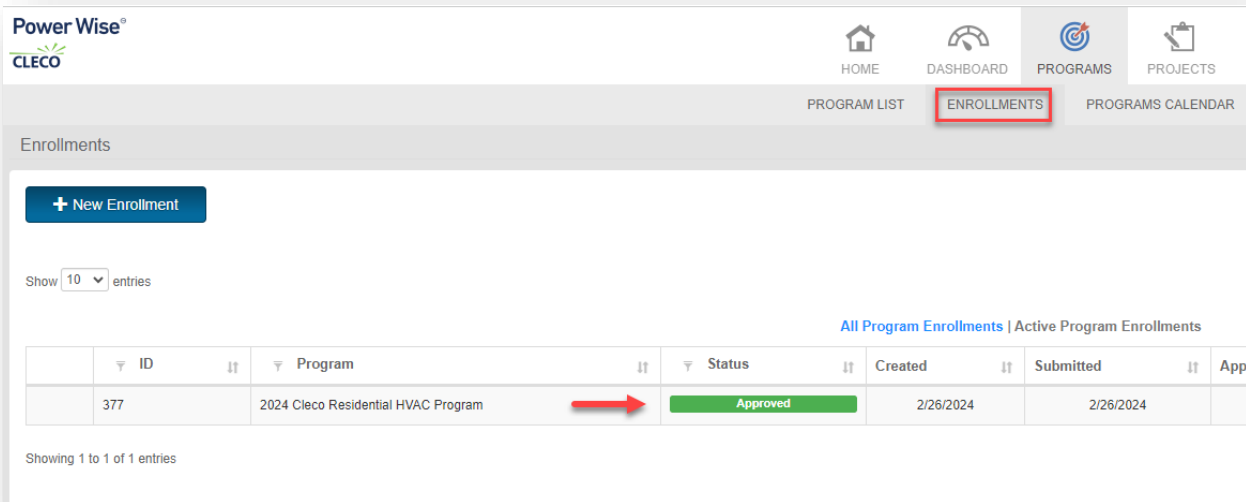
Please upload all marketing materials (i.e. flyers, brochures, door hangers, etc.) if this option is selected (pdf/jpg only)

By selecting this option, I acknowledge that I plan on only using Cleco provided brochures & flyers located on the Cleco Power Wise™ website



## Checking Enrollment Application Status

- 1. Users will receive an email once their application has been Approved by Cleco
- 2. Additionally, Users can log in at any time and check the status of their application by navigating to the Programs Icon and selecting Enrollments from the drop-down menu



Power Wise®  
CLECO

HOME DASHBOARD PROGRAMS PROJECTS

PROGRAM LIST **ENROLLMENTS** PROGRAMS CALENDAR

Enrollments

Show 10 entries

All Program Enrollments | Active Program Enrollments

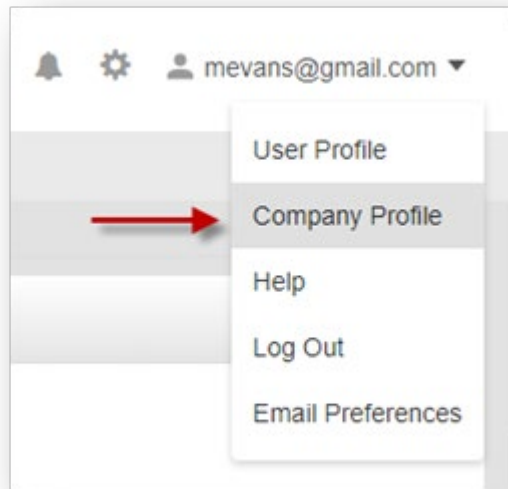
ID	Program	Status	Created	Submitted	Appr
377	2024 Cleco Residential HVAC Program	Approved	2/26/2024	2/26/2024	

Showing 1 to 1 of 1 entries

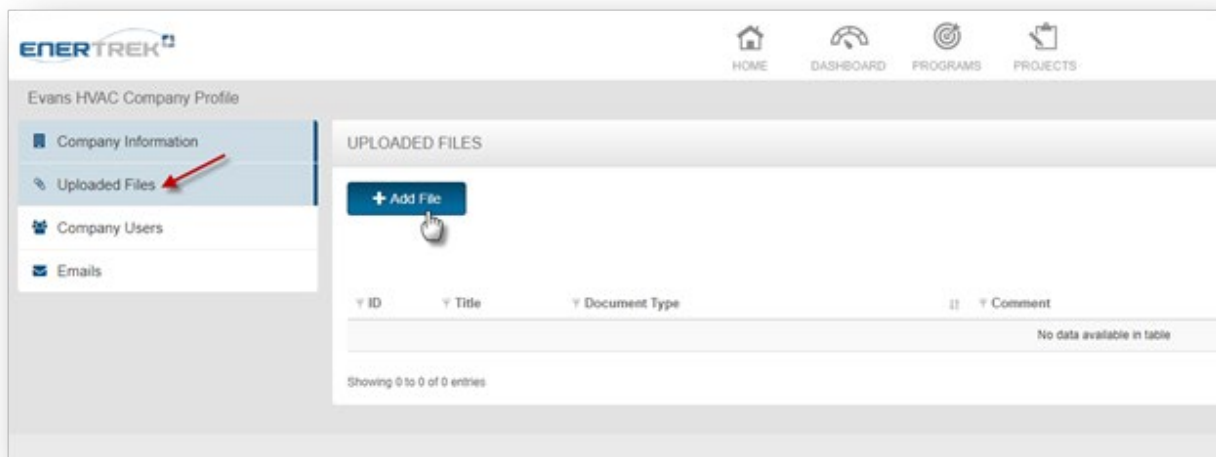
## Required Company Documents/Uploads

The Company Profile section is where users will upload certifications, licenses, W9s and any other required documentation relating to their HVAC Enrollment Application.

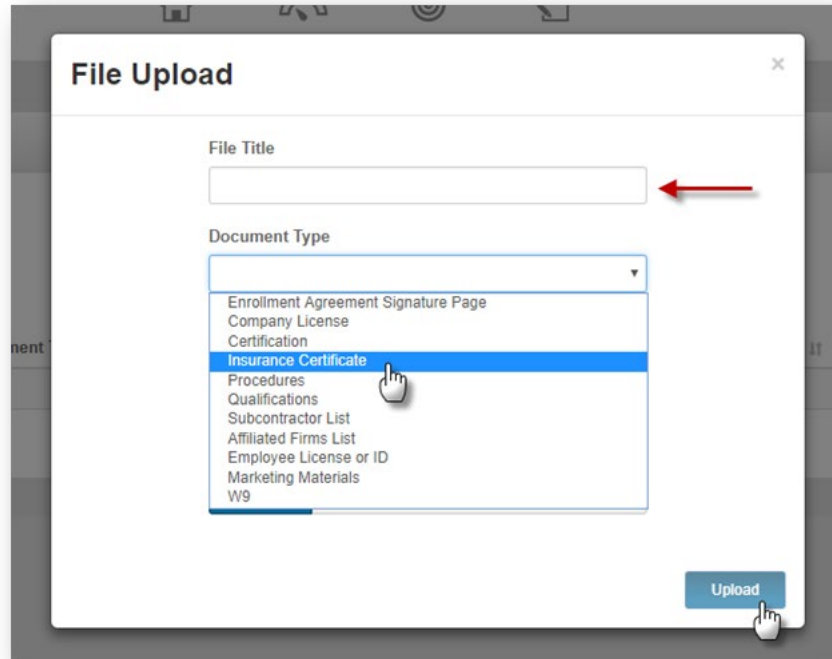
1. Click on Company Profile from the drop-down menu at the top right of the page under your Username:



2. Go to the Uploaded Files tab
3. Select the + Add File button in blue

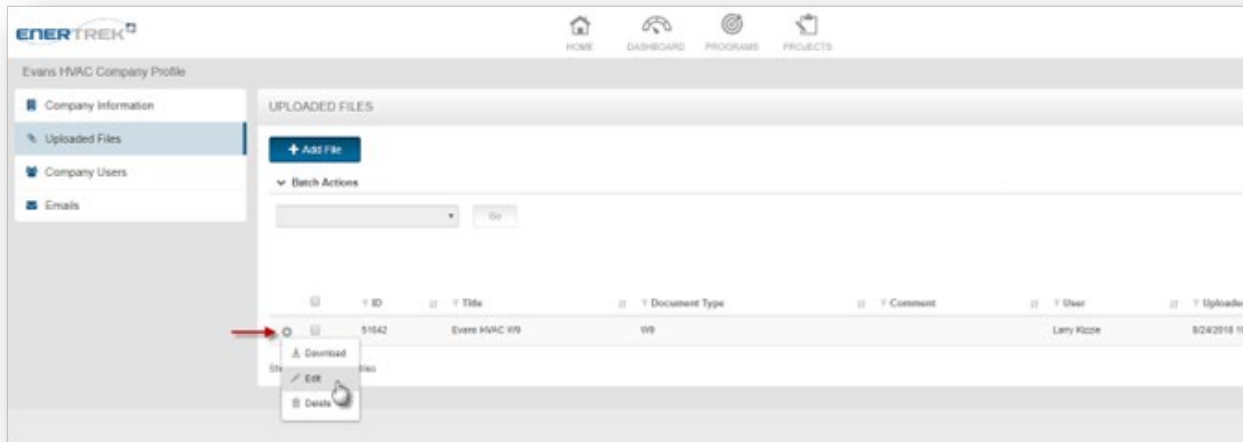


4. The File Upload modal will appear
  - a. Enter the file title
  - b. Select the type of file being uploaded
  - c. Enter any notes associated with the file
  - d. Select the file by clicking the Browse button
  - e. Select Upload



5. Repeat steps 3- 4 for each required document
6. Files uploaded will be displayed on Uploaded Files table
7. Use the Gear icon to the left of the document upload to Download, Edit or Delete the document





## Project Checklist

Once your enrollment application has been approved you can begin to create projects in P3. Below is a checklist of the information you will need prior to creating your project in P3.

### Customer information

- a. Customer first and last name
- b. Customer phone number
- c. Customer email address
- d. Customer Meter Number

### Home Information

- a. Existing Heating Type
- b. Existing Cooling Type
- c. Square footage
- d. Year Built
- e. Building Type
- f. Foundation Type

### Measure (HVAC) Information

- a. Single Family installations only
- b. What measure (HVAC type) was installed at location
  - i. Central AC (SEER2)
  - ii. Central Heat Pump (SEER2)

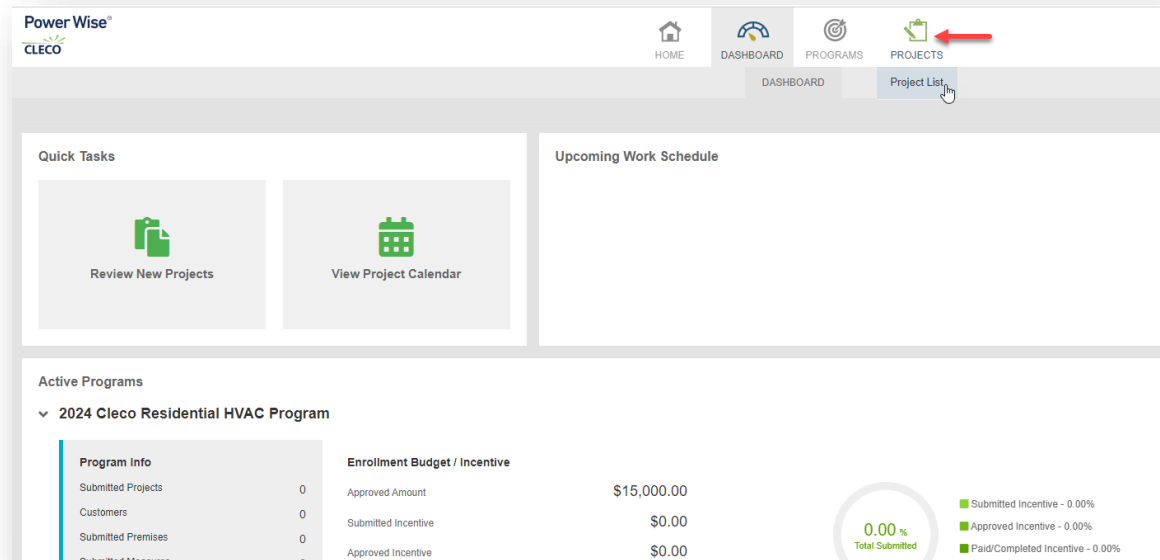
- c. AHRI Number and AHRI Certificate for upload
- d. Photo of new unit (outside nameplate)
- e. Photo of new unit (inside nameplate)
- f. Photo of retired unit nameplate (Early Retirement only)
- g. Proof of existing unit functionality

### Required Documents

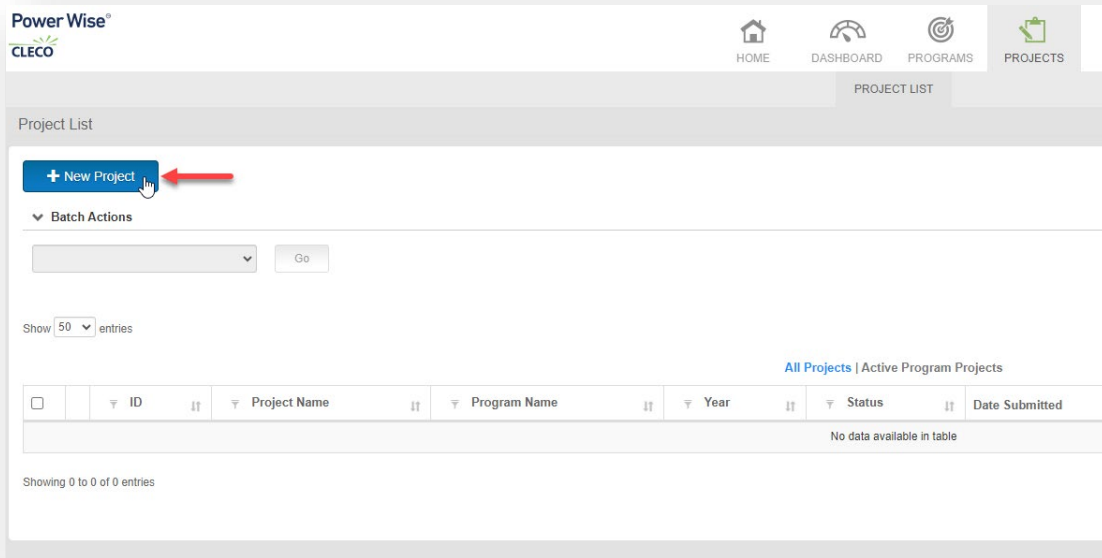
- a. Customer Invoice
- b. Signed Participant Agreement
- c. Low-Income verification if applicable

## Creating Projects in P3

- 1. Navigate to the Programs Icon at the top of the page
  - a. Select Project List from the drop-down menu

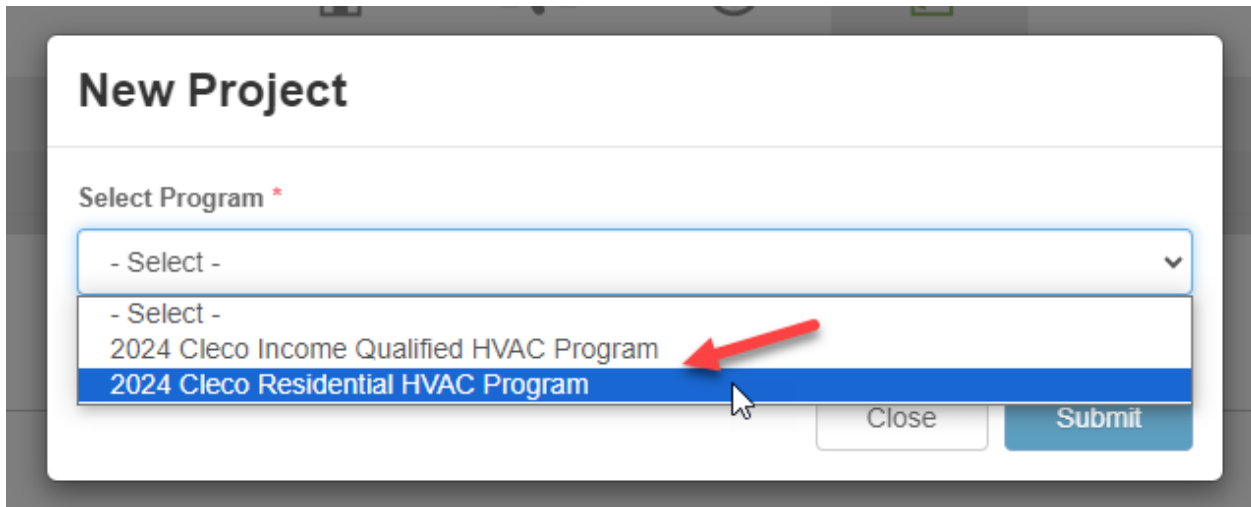


- 2. Once the page loads – Click the + New Project button in blue to the far-left of the screen



## New Project Modal

1. Select the HVAC Program from the drop-down menu
  - a. Click Submit



3. The New Project Modal will expand, and all required fields will be indicated with a red asterisk \*
  - a. The top portion of the modal reflects the following:
    - i. Customer First and Last Name
    - ii. Customer contact information

- iii. Measures performed at location
- iv. Low-Income eligibility (*Required for all Income Qualified projects only*)

**New Project**

Fill out the following information to create your project

Customer First Name \*  Customer Last Name \*

Phone \*  Phone 2  Email

How did you verify Low-Income eligibility? \*  
- SELECT -

What measures will you be performing for this project? \*

- 1.  Central Air Conditioning (SEER2)
- 2.  Central Heat Pump (SEER2)

Required only for Income Qualified customers

## Cleco Meter Lookup

The bottom portion of the New Project Modal allows you to enter the Customers Meter Number and perform a lookup. This lookup will validate the meter and the address to ensure the customer is a valid Cleco customer.

1. Enter the customer meter number in the Meter No. field (users can omit zeros before the meter number)
2. Click the Lookup button

**New Project**

Premise Address - Please verify Meter number

Meter No. \*   Premise Number

Address 1 \*  Address 2

City \*  State \*  Zip \*  Parish \*

3. If the Meter Number entered is valid, the address information will automatically populate in the modal

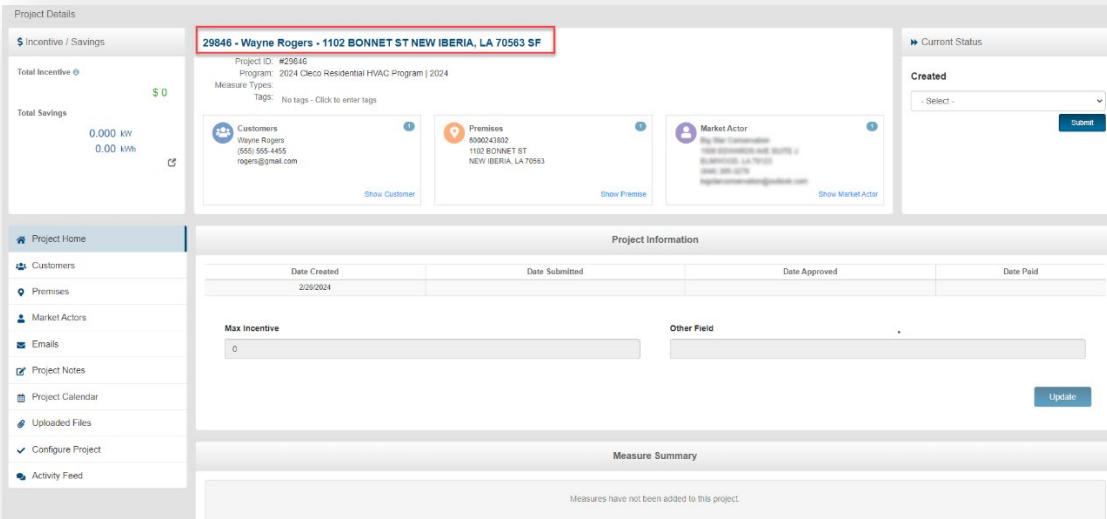
The screenshot shows a 'New Project' modal form. At the top, it says 'Premise Address - Please verify Meter number'. Below this, there are four main sections: 'Meter No.' with a text input containing '00000000168332318' and a 'Lookup' button; 'Premise Number' with a text input containing '600243802'; 'Address 1' with a text input containing '1102 BONNET ST'; and 'Address 2' with an empty text input. At the bottom, there are four dropdown menus: 'City' (NEW IBERIA), 'State' (LA), 'Zip' (70563), and 'Parish' (Iberia).

- 4. Enter required premise data & press submit
  - a. Existing Heating and Cooling Types
  - b. Square Footage of home
  - c. Year built
  - d. Building Type and Foundation type

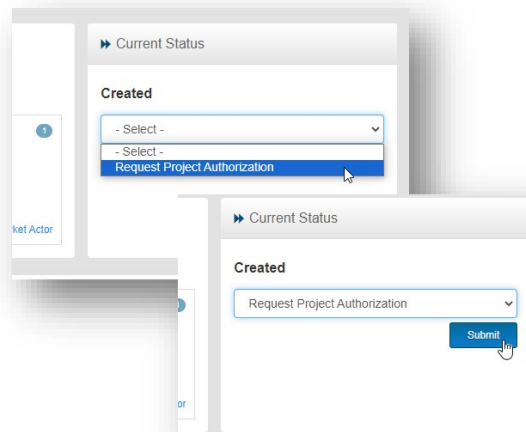
The screenshot shows a form for entering premise data. It has four dropdown menus: 'Primary Heating Type' (currently '- SELECT -'), 'Primary Cooling Type' (currently '- SELECT -'), 'Building Type' (currently '- SELECT -'), and 'Foundation Type' (currently '- SELECT -'). There are two text input fields: 'Square Footage' and 'Year Built'. At the bottom right, there are two buttons: 'Close' and 'Submit'.

## Project Pre-Approval (if applicable)

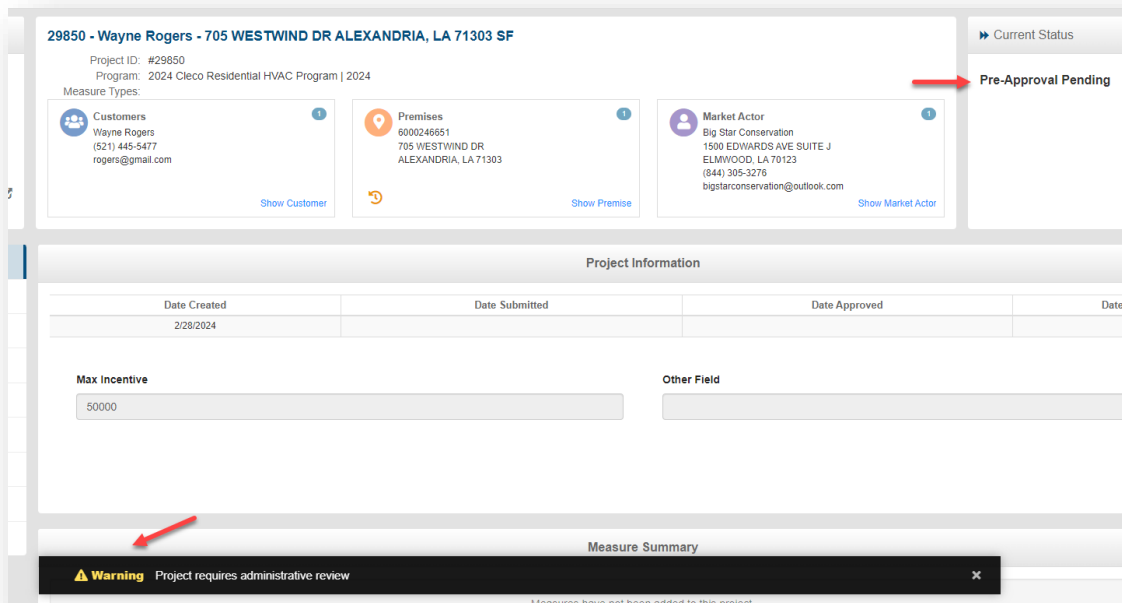
1. The page will load, and you will be taken to the Project Home Page
  - a. The Project Id and Project Reference will be listed at the top of the page
  - b. Verify that the information is correct on the screen



2. Next step will be to transition the project to Request Project Authorization (Pre-Approval – if applicable)
  - a. At the top-right of the screen – Select “Request Project Authorization” from the drop-down menu



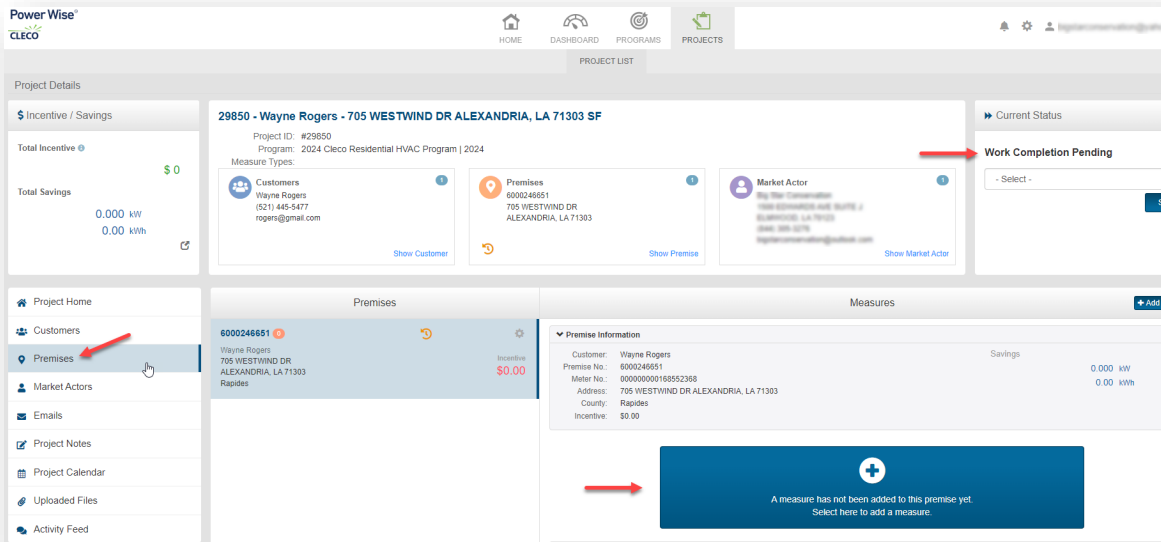
- 3. If the Project does not require Pre-Approval, it will move directly to Work Completion Pending and you can begin the process of adding measure(s) to the project.
- 4. However, some projects will require Pre-Approval by the Program Administrator
  - a. If the project requires Pre-Approval a notification will appear at the bottom of the screen
  - b. The project will show a status of “Pre-Approval Pending”
  - c. Projects require Pre-Approval for the following reasons:
    - I. Work has been completed at this home in the past
    - II. The meter number entered is a Commercial meter number



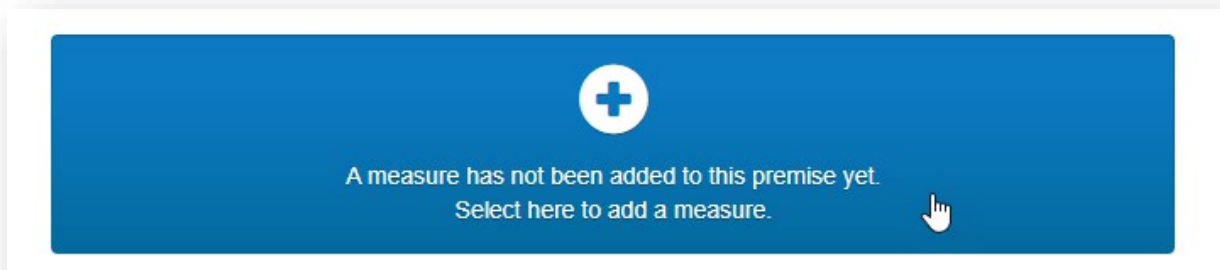
- 5. Once the Project has been Pre-Approved, you will receive an email notification and the project will be moved to the Work Completion Pending status.
- 6. Now your project is ready to add the HVAC measure(s) and upload the required documents

## Adding HVAC Measures

1. The Project must be in Work Completion Pending status to add Measures
2. On the left-hand navigation bar select Premises
3. Once the page loads you should see a large + Measure button in blue

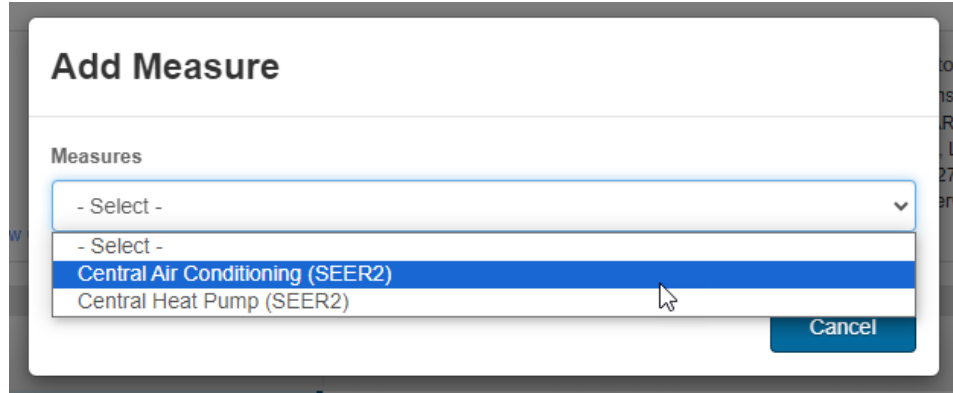


4. Click the + Measure button

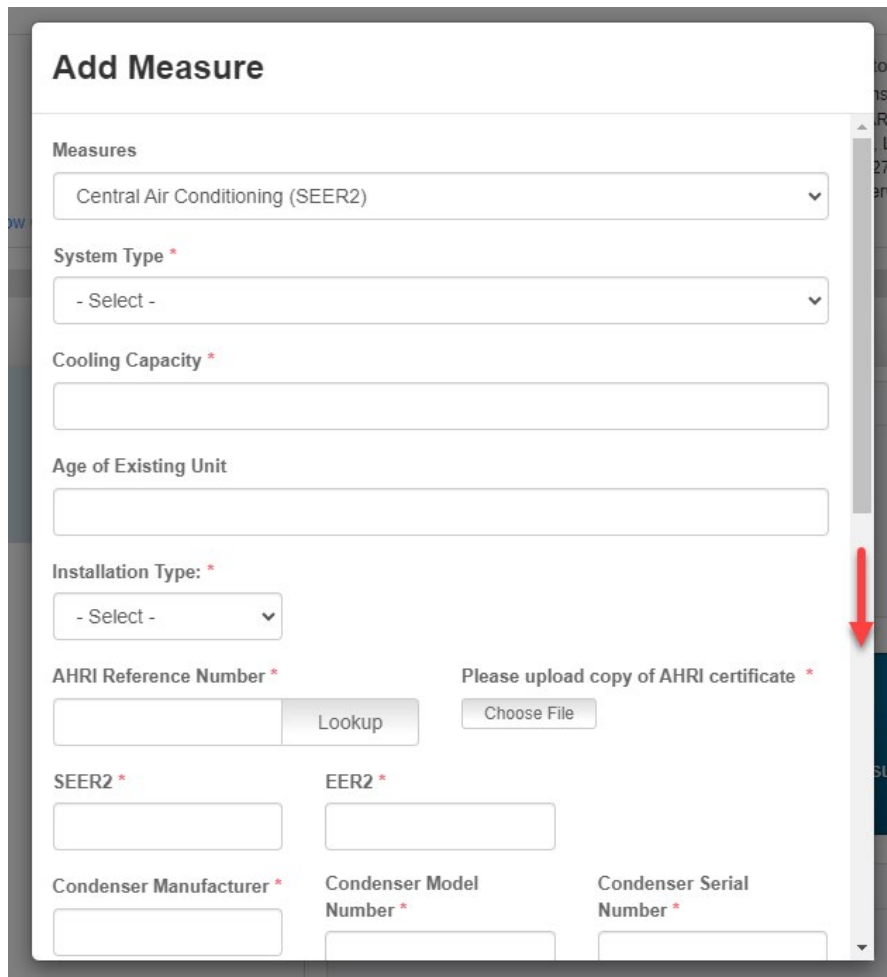


5. The Add Measure modal will appear
6. Select the Measure from the drop-down menu





- 7. The Add Measure modal will expand, and all required fields will be indicated with a red asterisk \*
  - a. Please note that you will need to use the scroll bar in the modal to view the entire form



## AHRI Lookups

1. Enter the AHRI Number in the 'AHRI Reference Number' field and click the Lookup button. AHRI Lookup must be used for both Central AC and Central HP measures.

The screenshot shows a web form with the following elements:

- Installation Type:** A dropdown menu with the text "- Select -".
- AHRI Reference Number:** A text input field containing the number "208773246".
- Lookup:** A button with a mouse cursor hovering over it.
- Please upload copy of AHRI certificate:** A section with a "Choose File" button.
- SEER2:** An empty text input field.
- EER2:** An empty text input field.

2. The AHRI Lookup feature will automatically provide the following data
  - a. Cooling Capacity (Btuh) and Heating Capacity for Central HP
  - b. SEER2, EER2, and HSPF2 for Central HP
  - c. Condenser Manufacturer and Model number
  - d. Coil Manufacturer and Model number

The screenshot shows the same form as above, but with the following data populated in the fields:

- SEER2:** 16
- EER2:** 12
- Condenser Manufacturer:** AMERICAN STANDAF
- Condenser Model Number:** 4A7A6036N1
- Condenser Serial Number:** (empty)
- Coil Manufacturer:** AMERICAN STANDAF
- Coil Model Number:** 4TXCB006DS3
- Coil Serial Number:** (empty)

A red rectangular box highlights the SEER2, EER2, Condenser Manufacturer, Condenser Model Number, Coil Manufacturer, and Coil Model Number fields.

3. Enter remaining required data

### Uploading documents and photos to the Measure Form

1. Required documents such as the AHRI Certificate and Photos (indoor/outdoor nameplate) will be required when entering the measure details. Required documents vary depending upon installation type (Replace on Burnout or Early Retirement)
2. Below are some examples of required uploads:

<b>Photo of new unit - outside nameplate *</b> <input type="button" value="Choose File"/>	<b>Photo of new unit - inside nameplate *</b> <input type="button" value="Choose File"/>	<b>Please provide proof of existing unit functionality (Photo of gauges showing that the system is currently working and/or customer responses documenting the condition of the replaced unit(s))</b> <input type="button" value="Choose File"/>
--	---	---

3. Click on the 'Choose File' button and navigate to the document on your computer
  - a. All uploaded documents will be displayed and can be replaced by clicking the Replace File button

<b>Photo of new unit - outside nameplate *</b>  <b>IMG_0048.JPG</b> <input type="button" value="Replace File"/>	<b>Photo of new unit - inside nameplate *</b>  <b>IMG_0048.JPG</b> <input type="button" value="Replace File"/>	<b>Please provide proof of existing unit functionality (Photo of gauges showing that the system is currently working and/or customer responses documenting the condition of the replaced unit(s))</b>  <b>a2585576573_65.jpg</b> <input type="button" value="Replace File"/>
--	---	---

## Saving the Add Measure form

1. Click the Save button at the bottom of the form when all data has been entered and all required documents/photos have been uploaded

The screenshot shows the 'Add Measure' form with the following fields and content:

- Existing System Type:** Packaged AC (dropdown)
- Existing Heating Type:** Electric Resistance (dropdown)
- Existing System Manufacturer:** Rheem (text input)
- Existing Cooling Capacity:** 35000 (text input)
- Photo of retired unit nameplate - Early Retirement only:** Choose File button
- Photo of new unit - outside nameplate \*:** IMG\_0048.JPG (file name), Replace File button
- Photo of new unit - inside nameplate \*:** IMG\_0048.JPG (file name), Replace File button
- Additional photo upload:** a2585576573\_65.jpg (file name), Replace File button
- Notes:** Empty text area
- Buttons:** Cancel and Save (with a red arrow pointing to it)

2. Any required fields that are missed will be highlighted in Red.
3. Provide the missing data and click Save again

The screenshot shows the form with the following validation errors highlighted in red:

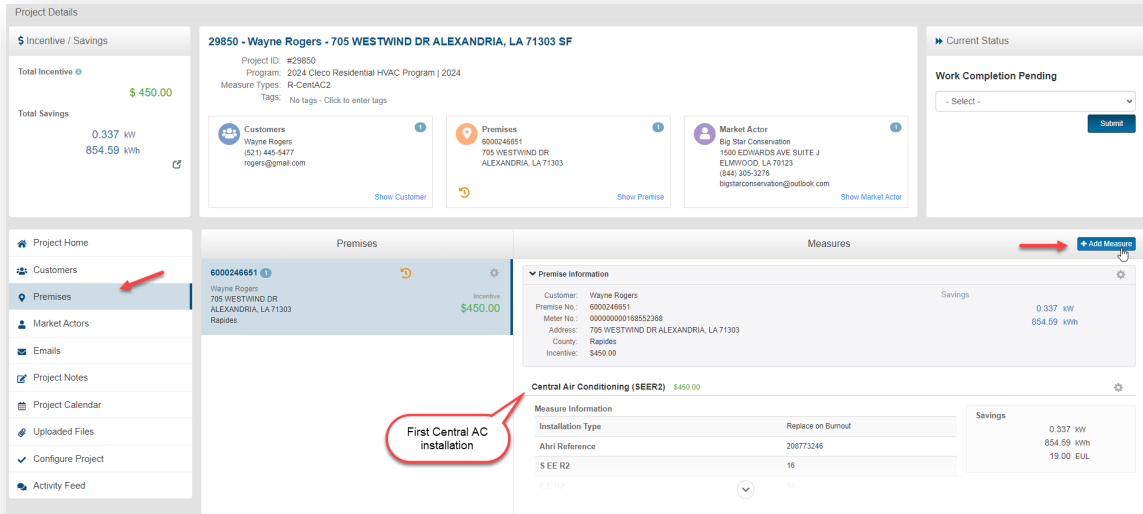
- Installation Type \*:** - Select - (dropdown), error message: "An option is required for InstallationType."
- Please upload copy of AHRI certificate \*:** Choose File button, error message: "The file: Please upload copy of AHRI certificate is required"

Other fields shown include:

- AHRI Reference Number \*:** 208773246 (text input), Lookup button
- SEER2 \*:** 16 (text input)
- EER2 \*:** 12 (text input)

## Adding more than one HVAC installation to a Project (if applicable)

1. While still on the Premise tab locate the + Add Measure button in blue to the far right of the screen
  - a. The button will be smaller after adding the first measure



2. The Add Measure Modal will appear
  - a. Repeat Steps 5 & 6 to add second installation to project

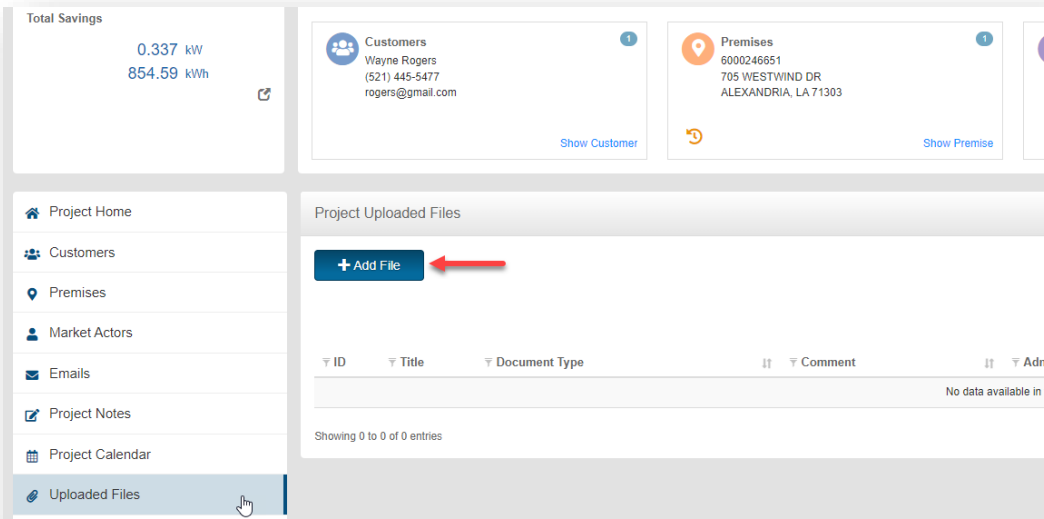
The 'Add Measure' modal form is shown with the following fields and options:

- Measures:** A dropdown menu with 'Central Air Conditioning (SEER2)' selected.
- System Type:** A dropdown menu with '- Select -' selected.
- Cooling Capacity:** An empty text input field.
- Age of Existing Unit:** An empty text input field.
- Installation Type:** A dropdown menu with '- Select -' selected.
- AHRI Reference Number:** A text input field with a 'Lookup' button next to it.
- Please upload copy of AHRI certificate:** A 'Choose File' button.
- SEER2:** A text input field.
- EER2:** A text input field.
- Condenser Manufacturer:** A text input field.
- Condenser Model Number:** A text input field.
- Condenser Serial Number:** A text input field.

A red arrow points to the bottom right corner of the modal form.

## Project Required Documents

1. All Projects regardless of Program Type (Residential/Income Qualified) will require the following documentation:
  - a. Signed Residential Participant Agreement (RPA)
  - b. Customer Invoice
2. Upload required documents by selecting 'Uploaded Files' on the left navigation bar
  - a. Select the + Add File button in blue



3. The Add Document modal will load

The 'Add Document' modal form contains the following fields and controls:

- Title \***: A text input field.
- Document Type \***: A dropdown menu with the option '- Select -'.
- Comment**: A text area for entering a comment.
- Admin only**: A checkbox that is currently unchecked.
- File \***: A file selection field with a blue 'Browse' button.
- Buttons**: 'Cancel' and 'Save' buttons at the bottom right.

4. All required fields are indicated with a red asterisk \*

**Add Document**

Title \*  
Agreement

Document Type \*  
Participant Agreement  
- Select -  
Participant Agreement  
Before and After Photos  
AHRI Certificate  
Inspection Documents  
All Bills Paid Affidavit  
Additional Files and Photos

Admin only

File \*  
Browse

Cancel Save

- 5. Click on the Browse button and navigate to the document on your computer
  - a. The uploaded document will be displayed on the table
  - b. Repeat steps 1-5 to upload each required document

Project Uploaded Files

+ Add File

Batch Actions

Go

Search:

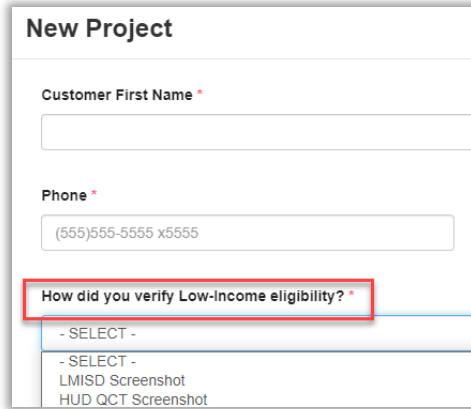
<input type="checkbox"/>	ID	Title	Document Type	Comment	Admin Only	User	Uploaded Date
<input type="checkbox"/>	129874	Agreement	Participant Agreement		False	T.Cooper	3/6/2024 3:17:05 PM

Showing 1 to 1 of 1 entries

## Income Qualified HVAC Projects

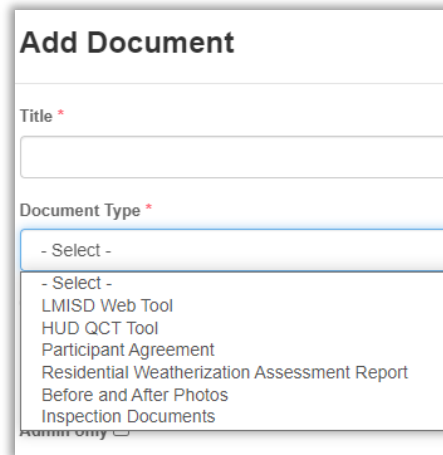
All Income Qualified HVAC projects will require that premise qualifies for Income Qualified.

1. In the New Project Modal you will be required to answer, “How did you verify Low-Income eligibility?”
  - a. [LMISD](#) Screenshot:
  - b. [HUD QCT](#) Screenshot:



The screenshot shows a 'New Project' form with the following fields: 'Customer First Name \*', 'Phone \*', and 'How did you verify Low-Income eligibility? \*'. The dropdown menu for the last field is open, showing options: '- SELECT -', '- SELECT -', 'LMISD Screenshot', and 'HUD QCT Screenshot'. The dropdown is highlighted with a red border.

2. Your response to this question will then determine which eligibility form will be required prior to submitting your project for approval.



The screenshot shows an 'Add Document' form with the following fields: 'Title \*' and 'Document Type \*'. The dropdown menu for the last field is open, showing options: '- Select -', '- Select -', 'LMISD Web Tool', 'HUD QCT Tool', 'Participant Agreement', 'Residential Weatherization Assessment Report', 'Before and After Photos', and 'Inspection Documents'.

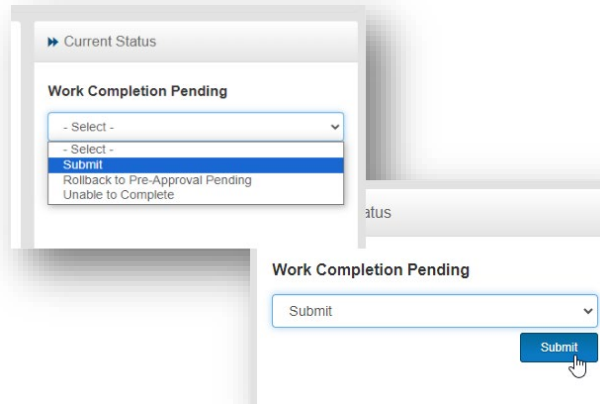
## Submitting your project for Approval

Once your enrollment application has been approved you can begin to create projects in P3. Below is a checklist of the information you will need prior to creating your project in P3.

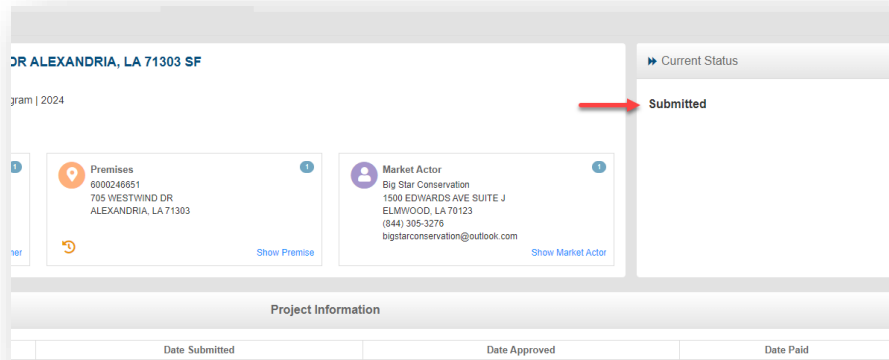
1. Confirm that the following is completed for your project:



- a. Measure(s) have been added to your project
  - b. Participant Agreement and Customer Invoice has been uploaded to your project in the “Uploaded Files” section
  - c. If Project is Income Qualified/Low-Income - Proof of Income Eligibility has been uploaded to the “Uploaded Files” section
2. If the answer is Yes to all the above, project is ready to submit
3. Navigate to top-right of the screen, select, & click ‘Submit’ from the drop-down menu



4. After your project has been submitted it will remain in this status until the Program Administrator Approves and invoices project.



5. System generated emails will be sent to you regarding the status of your project