



**P3 USER GUIDE FOR MARKET ACTORS
COMMERCIAL STANDARD OFFER PROGRAM**



Updated January 2017

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P3 INTRODUCTION

The P3 User Guide provides Market Actors in Commercial Standard Offer Program 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 Commercial 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.

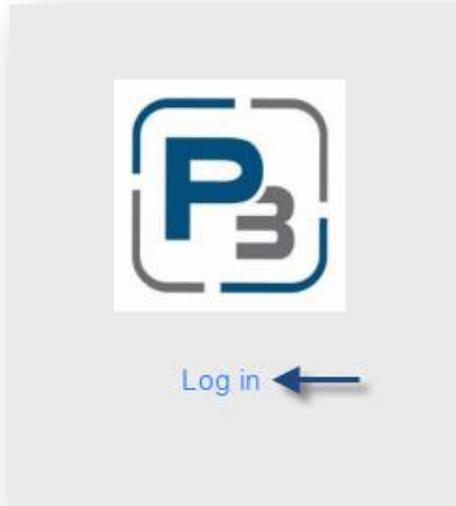
* The items in ***bold italics*** are selection items/buttons as they are displayed on the screen.

The online data tracking system used for the Commercial Standard Offer Program is ***EnerTrek® P3***, developed specifically for the various Incentives Programs being implemented by utilities. Henceforth, the online data tracking system will be referred to as P3.

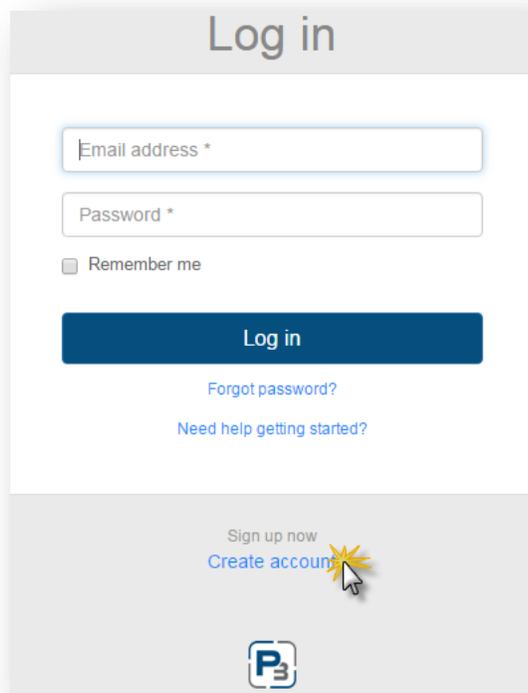


P3 REGISTRATION PROCESS

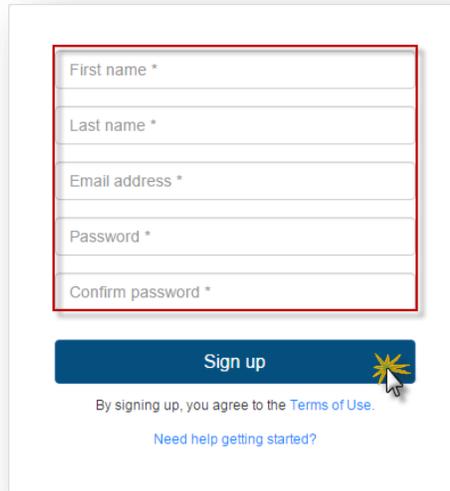
1. Navigate to: <https://<utilityname>.p3.enertrek.com>
2. Click on the Log In link



3. Click on the Create Account link

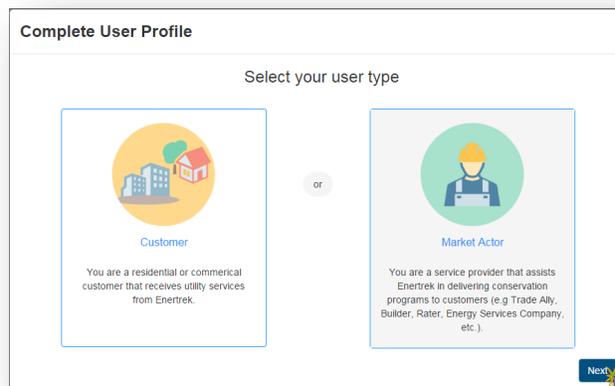


1. Enter all information (**Please note:** your email address and password entered will be your login credentials)
 - a. First Name
 - b. Last Name
 - c. Email address
 - d. Password
 - e. Confirm Password



A screenshot of a sign-up form. The form contains five input fields: "First name *", "Last name *", "Email address *", "Password *", and "Confirm password *". Below the fields is a blue "Sign up" button with a mouse cursor hovering over it. Under the button, there is a line of text: "By signing up, you agree to the [Terms of Use.](#)" and a link: "[Need help getting started?](#)".

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



A screenshot of the "Complete User Profile" modal. The title is "Complete User Profile". Below the title is the instruction "Select your user type". There are two options, each in a light blue box. The first option is "Customer", with an icon of a house and a person, and the text "You are a residential or commercial customer that receives utility services from Enertrak." The second option is "Market Actor", with an icon of a person wearing a hard hat and safety vest, and the text "You are a service provider that assists Enertrak in delivering conservation programs to customers (e.g. Trade Ally, Builder, Rater, Energy Services Company, etc.)." A "Next" button with a mouse cursor is located at the bottom right of the modal.

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**

Complete User Profile

Select your user type



Customer

You are a residential or commercial customer that receives utility services from Enertrek.

or



Market Actor

You are a service provider that assists Enertrek in delivering conservation programs to customers (e.g Trade Ally, Builder, Rater, Energy Services Company, etc.).

[Next](#)

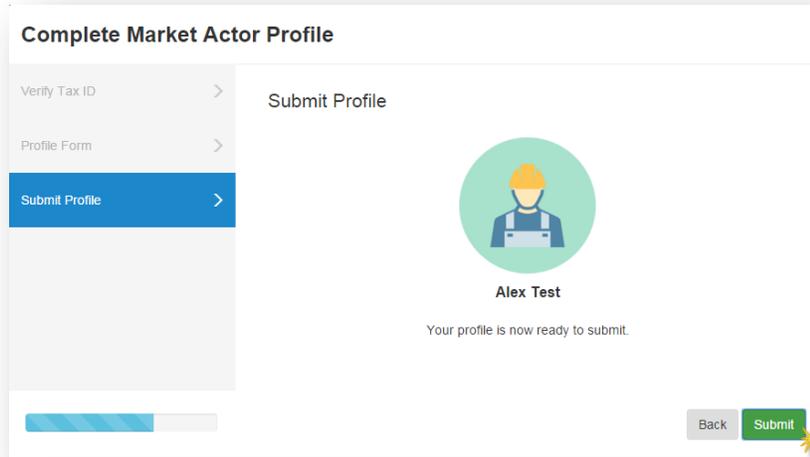
4. Enter Tax ID number & click **Next**

The screenshot shows the 'Complete Market Actor Profile' form with the 'Verify Tax ID' step selected. The left sidebar contains 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.' and 'Tax ID should be input as **nine digits without hyphens**.' Below this text is a text input field labeled 'Tax ID'. At the bottom right of the form, there are 'Back' and 'Next' buttons, with a yellow starburst icon pointing to the 'Next' button.

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

The screenshot shows the 'Complete Market Actor Profile' form with the 'Profile Form' step selected. The left sidebar contains three items: 'Verify Tax ID', 'Profile Form' (highlighted in blue), and 'Submit Profile'. The main content area is titled 'Profile Form' and contains the following text: 'Fill out your company's information below.' Below this text are three input fields: 'Company Name *' (with a red asterisk), 'Company DBA', and 'Company Type' (a dropdown menu with 'Corporation' selected). At the bottom left of the main content area, the text 'Tax ID: 555555555' is displayed. At the bottom right of the form, there are 'Back' and 'Next' buttons, with a yellow starburst icon pointing to the 'Next' button.

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.

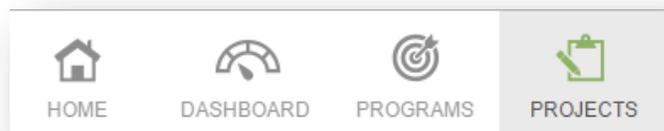
The Dashboard icon is where you will land after logging in.



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.

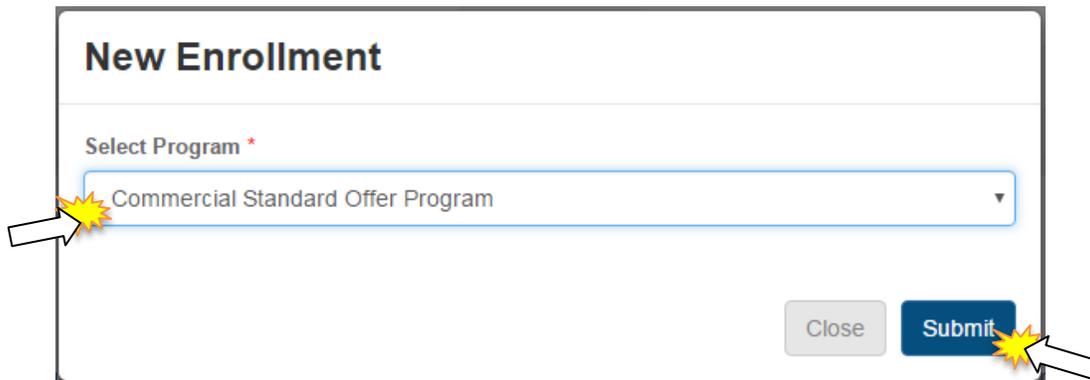


P3 PROGRAM ENROLLMENT

In order to get accepted into the Commercial program, 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 Utility specific 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 Commercial 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

Affiliated Firms

Does your company have any affiliated firms? *

- Yes
- No

If yes, I have uploaded my affiliated firms information under my company profile.

Insurance Acknowledgement

I acknowledge that my Certificate of Insurance must be sent directly to the Program Administrator by my insurance company agency with TNMP listed as an additional insured. *

Save Submit

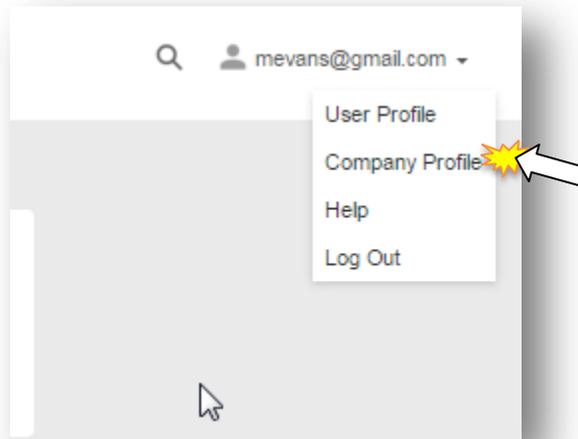
Please Note: The enrollment application will be processed and you will be notified via email upon approval or denial.

P3 PROGRAM ENROLLMENT – REQUIRED DOCUMENTS

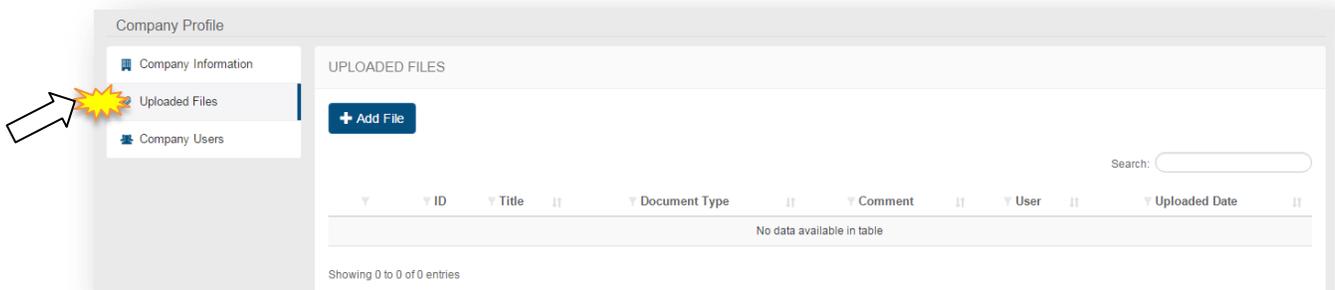
The Company Profile section is where Market Actors will upload certifications, licenses, W-9 and other documentation relating to the Enrollment Application.

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



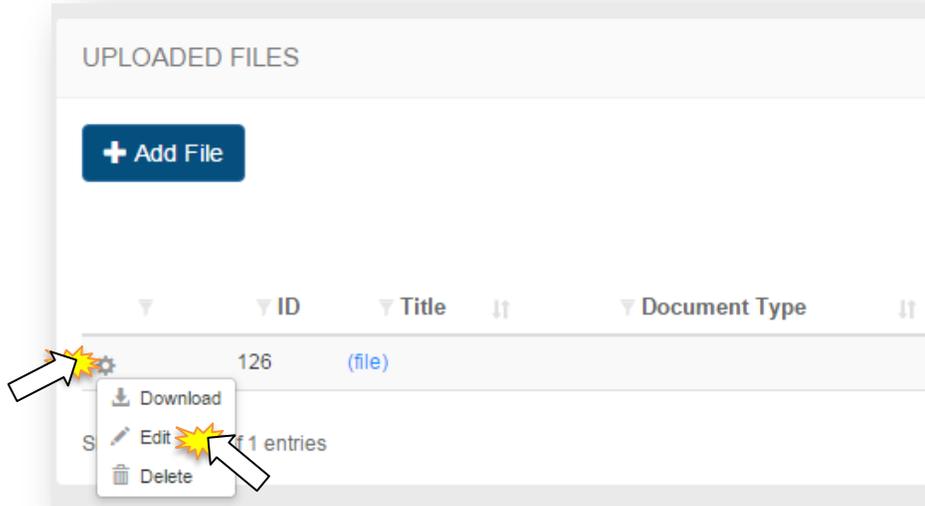
3. Click on the **Add File** button
4. Select the type of file being uploaded
5. Enter a title
6. Enter any notes associated with the file

The image shows a 'File Upload' dialog box with a close button (X) in the top right corner. It contains four main sections: 'File Title' with a text input field, 'Document Type' with a dropdown menu, 'Comment' with a text area, and 'File' with a 'Browse' button. A blue 'Upload' button is located in the bottom right corner. Four white arrows with yellow starburst callouts point to the 'File Title' input, the 'Document Type' dropdown, the 'Browse' button, and the 'Upload' button.

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

Edit Market Actor Company Documents

1. Click on Company Profile from the 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.)

The screenshot shows the 'File Upload' modal form. It has a title bar with a close button. The form contains the following fields:

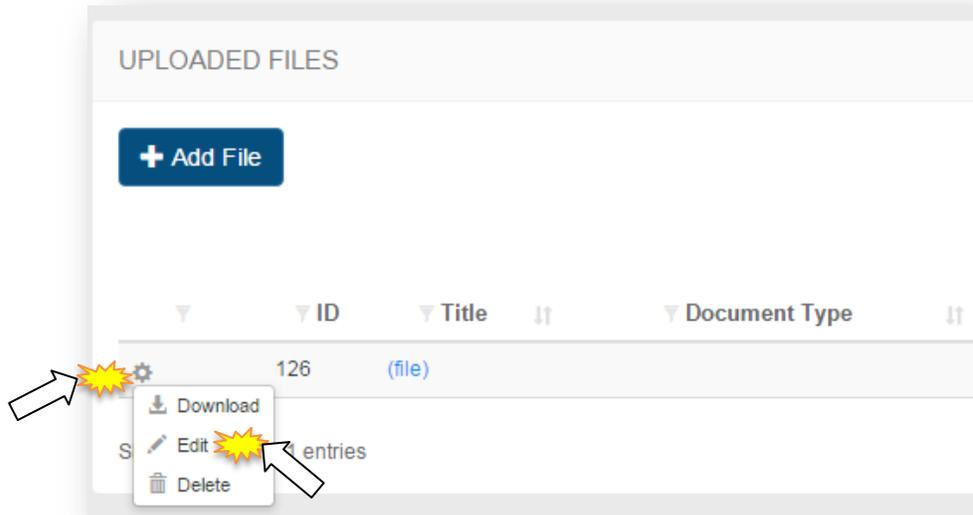
- File Title:** A text input field containing 'TestingDocuments'.
- Document Type:** A dropdown menu with 'Procedures' selected.
- Comment:** A text area containing 'test'.
- File:** A section with a 'Browse' button and 'Unchanged' text.

An 'Edit' button is located at the bottom right of the modal.

7. Click **Edit**

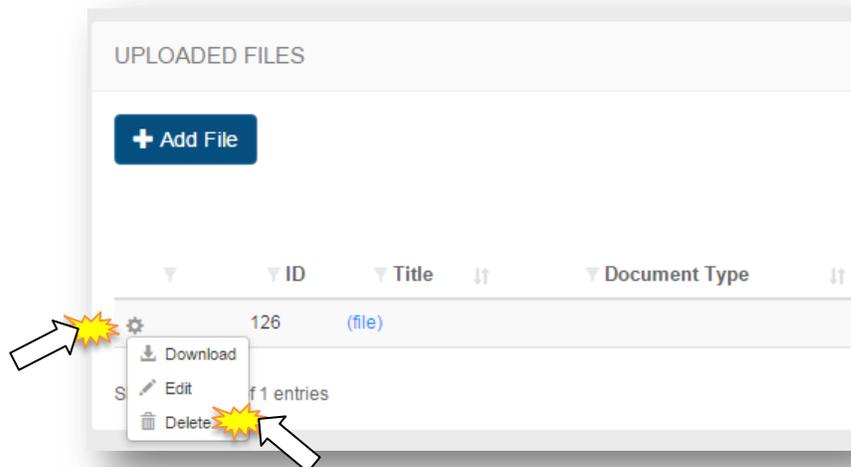
Download Market Actor Company Documents

1. Click on Company Profile from the 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

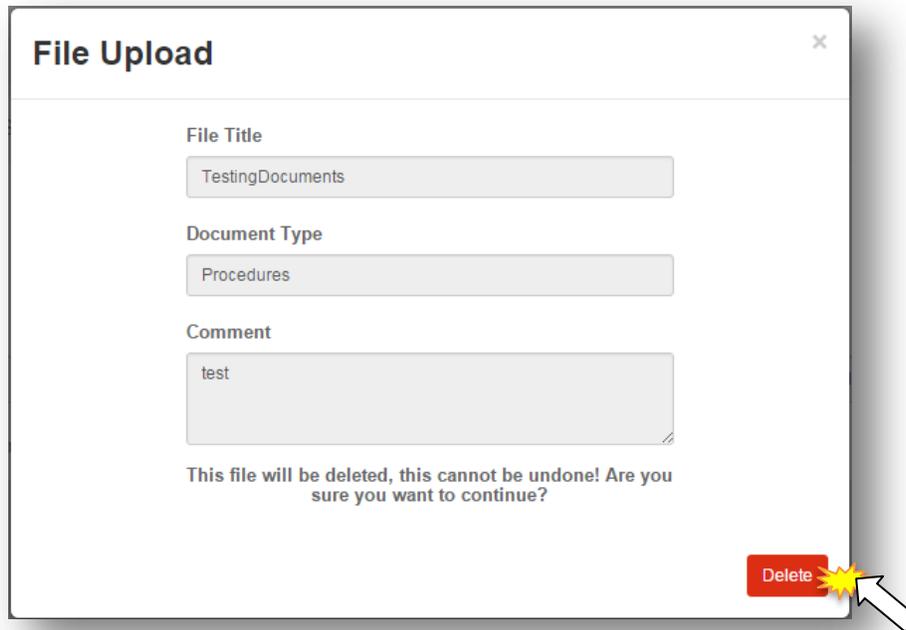


Delete Market Actor Company Documents

1. Click on Company Profile from the 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 screenshot shows the Market Actor Dashboard interface. At the top, there is a 'DASHBOARD' tab and a welcome message: 'Welcome Back Test Company 1!'. The dashboard is divided into several sections:

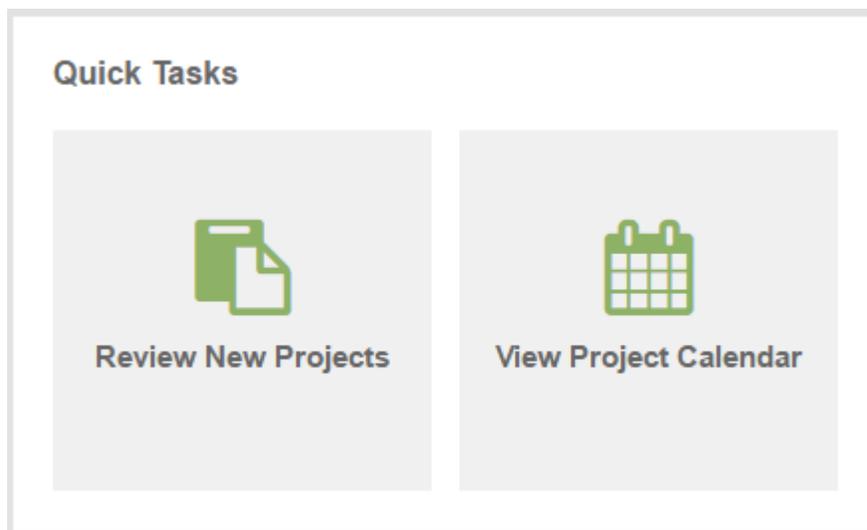
- Quick Tasks:** Contains two buttons: 'Review New Projects' (with a document icon) and 'View Project Calendar' (with a calendar icon).
- Upcoming Work Schedule:** Lists tasks for three days:
 - Wednesday, 10/12/2016:** 8:00 AM - 6:00 PM, [30292 - Blake Thomas - 507 KENT PITTSBURG, TX 75686 SF](#)
 - Tuesday, 10/18/2016:** 8:00 AM - 3:30 PM, [Test Company 1 - MF - 321 Mostest ave 319 Austin TX 78701](#)
 - Wednesday, 10/19/2016:** 8:00 AM - 3:00 PM, [Test Project](#)
- Active Programs:** Shows the 'Residential Standard Offer Program' with a summary table:

Program Info		Enrollment Budget / Incentive	
Submitted Projects	2	Approved Amount	\$60,000.00
Customers	2	Submitted Incentive	\$792.05
Submitted Premises	2	Paid Incentive	\$0.00
Submitted Measures	2	Budget Remaining	\$59,207.95

 A circular progress indicator shows '0.08% Submitted'.
- Activity Feed:** Includes a 'Display' dropdown menu set to 'All' and a list of recent activity:
 - 10/4/2016 10:37:34 AM: Measure: C-LightCtrl Updated for Premise: 9825 South Bend Dr. Austin, TX 78749 in Project: 20243 admin admin
 - 10/4/2016 10:37:34 AM: Measure: C-LFluorescent Updated for

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.

Activity Feed

Display

All ▼

10/4/2016 10:37:34 AM
Measure: C-LightCtrl Updated for
Premise: 9825 South Bend Dr. Austin, TX
78749 in Project: 20243 admin admin

10/4/2016 10:37:34 AM
Measure: C-LFluorescent Updated for
Premise: 9825 South Bend Dr. Austin, TX
78749 in Project: 20243 admin admin

10/4/2016 10:37:34 AM
Measure: C-LED Updated for Premise:
9825 South Bend Dr. Austin, TX 78749 in
Project: 20243 admin admin

10/4/2016 10:37:34 AM
Measure: C-IBLED Updated for Premise:
9825 South Bend Dr. Austin, TX 78749 in
Project: 20243 admin admin

- 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.

Upcoming Work Schedule

Wednesday, 10/12/2016
 8:00 AM - 6:00 PM [30292 - Blake Thomas - 507 KENT PITTSBURG, TX 75686 SF](#)

Tuesday, 10/18/2016
 8:00 AM - 3:30 PM [Test Company 1 - MF - 321 Mostest ave 319 Austin TX 78701](#)

Wednesday, 10/19/2016
 8:00 AM - 3:00 PM [Test Project](#)

[View Project Calendar](#)

- 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.

▼ **Commercial Standard Offer Program**

Program Info

Submitted Projects	4
Customers	4
Submitted Premises	4
Submitted Measures	37

Enrollment Budget / Incentive

Approved Amount	\$500,000.00
Submitted Incentive	\$14,685.55
Paid Incentive	\$0.00
Budget Remaining	\$485,314.45

+ Create Project

View Projects

View Project Calendar

Overall Program Budget

Program Budget Amount	\$1,000,000.00
Program Budget Remaining	\$840,765.58

Market Actor Saving

Submitted Total	33.732 kW
Submitted Total	226,357.13 kWh

▼ **Measure Detail** 37 Installations

Measure Name	Measure Code	Premises	Measures	kW	kWh	Incentive
Integrated-ballast LED Lamps	C-IBLED	4	4	32.602	226046.58	14414.60
Halogen	C-Halogen	4	4	0.000	0.00	0.00

- 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 PROJECT STAGES

The P3 Commercial workflow is comprised of six distinct stages. Below are the stages to create Commercial projects and move them through the process to final submittal.

- Project Initiation (Adding Customer/Premise/Survey Form)
- Submit Project for Pre-Approval
- Work Completion Pending
- Submit Project for Final Approval
- Project Approval
- Project Payment

P3 Project Navigation

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.

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.

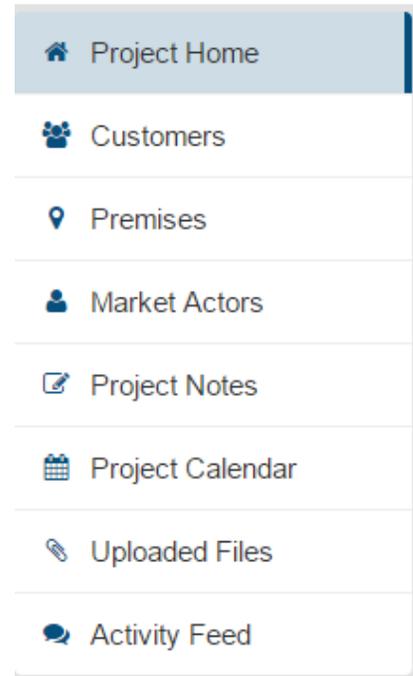
The Premises tab contains premise (site) information and is where measures are added.

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 calendar events are added. Calendar events are required to request project authorization.

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

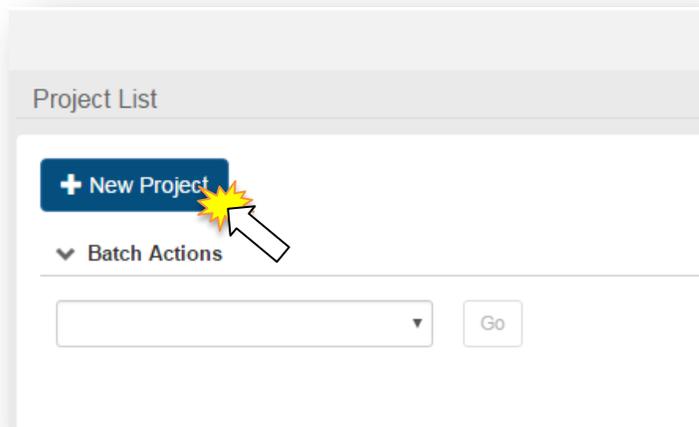


PROJECT INITIATION

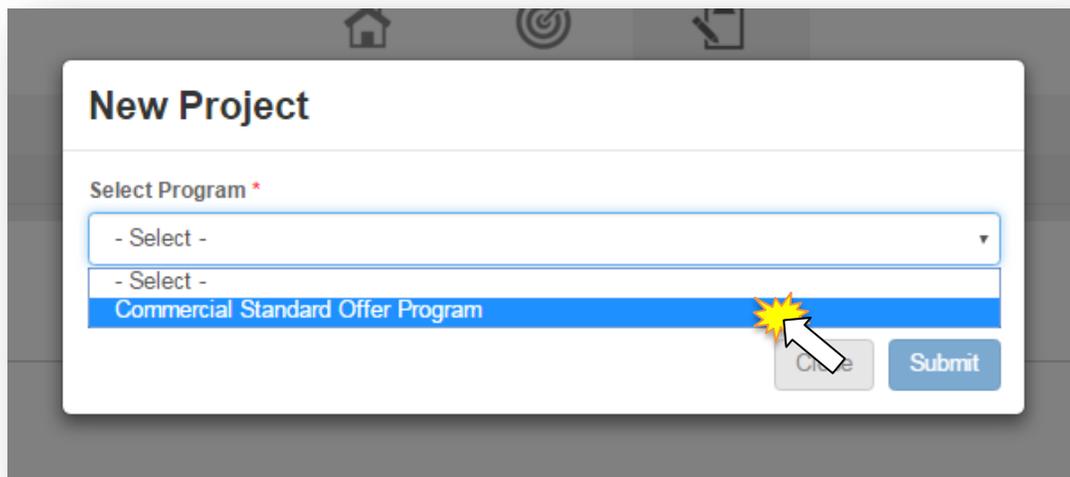
Below are the steps outlining the creation of a Commercial Project including adding customers, premises and uploading Survey Forms.

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 modal will appear



1. Select Commercial Program



2. Select the project type
 - a. New Construction
 - b. Retrofit
 - c. Combination
3. Enter all information on the modal form to create the project

New Project

Select Program *
Commercial Standard Offer Program

Project Name *
[Empty text box]

Project Type *
New Construction

Project Contact Name *
[Empty text box]

Project Phone 1 *
(555)555-5555 x5555

Project Contact Phone 2
(555)555-5555 x5555

Project Description *
[Empty text box]

Is this project sponsored by the Customer (Self-Sponsored Project)? *
1. Yes, Customer Self-Sponsored
2. No, Independent Project Sponsor

Estimated Project Schedule:
Work Start Date *
[Empty text box]

Work End Date *
[Empty text box]

Close Submit

4. Click Submit

5. You will be taken to the Project Home Page

Project Details

\$ Incentive / Savings

Total Incentive *

\$ 4617.78

Total Savings

9.878 kW
68486.69 kWh
0.00 gal
0.00 tmm
0.00 peak tmm

Commercial User Guide Walkthrough

Project ID: #10200
Program: Commercial Standard Offer Program | 2016
Measure Types: C-Halogen, C-HID, C-IBCFL, C-IBCCFL, C-ModCFL, C-IBLED, C-LED, C-LFluorescent, C-LightCtrl

Customers 1

Tester Tester

[Show Customer](#)

Premises 1

00000
456 Main St
Austin, TX 78745

[Show Premise](#)

Market Actor 1

Test Company 1
1515 S. Capital of Texas Highway #100
Austin, TX 78746
(512) 545-5555
bthomas@frontierassoc.com

[Show Market Actor](#)

Current Status

Pre-Approval Pending

Project Home

Customers

Premises

Market Actors

Project Notes

Project Calendar

Project Information

Date Created	Date Submitted	Date Approved	Date Paid
3/11/2016	3/11/2016		

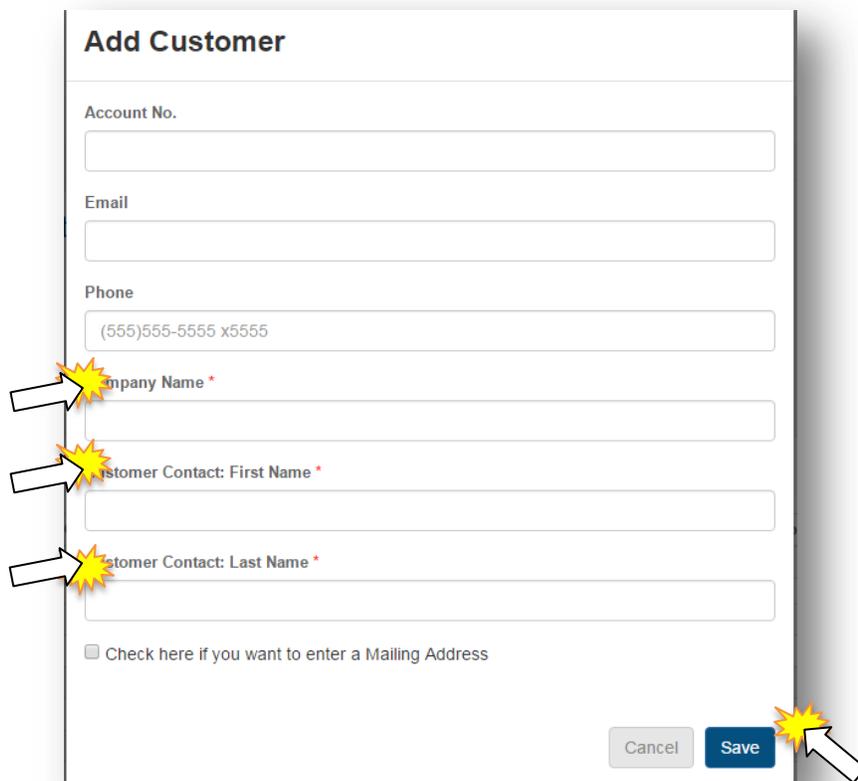
Measure Summary

Total Savings



Add Customer

1. Click on the Add Customer link
 - a. Add Customer box will appear
2. Enter all required information
 - a. Company Name
 - b. Customer First Name
 - c. Customer Last Name
3. Is a separate mailing address needed?
 - a. Yes – Fill out all information required for the separate mailing address
 - b. No – ignore checkbox



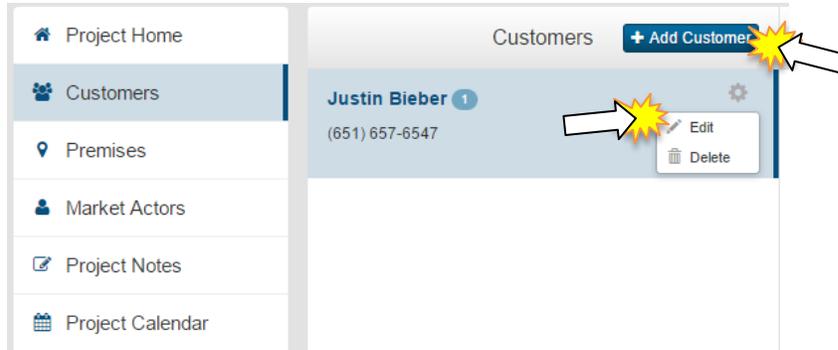
The screenshot shows a web form titled "Add Customer". The form contains several input fields: "Account No.", "Email", "Phone" (with a pre-filled number "(555)555-5555 x5555"), "Company Name *", "Customer Contact: First Name *", and "Customer Contact: Last Name *". There is a checkbox labeled "Check here if you want to enter a Mailing Address". At the bottom right, there are "Cancel" and "Save" buttons. White arrows with yellow starburst callouts point to the "Company Name *", "Customer Contact: First Name *", "Customer Contact: Last Name *", and "Save" buttons.

4. Click Save

Edit Customer

Customer data can be edited while the project is in Initiated and Work Completion Pending statuses. Once the project has been submitted for Final Approval, the customer data will not be editable.

1. Log in as a Market Actor
2. Navigate to a Created or Work Completion Pending project in the project list.
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

Add Premise

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



3. Select the Premise type
 - a. New Construction
 - b. Retrofit
 - c. Greenfield
4. Enter all information on the form regarding the premise

Add Premise

Construction Type *

- Select -

For New Construction projects please enter "00000" for the premise and meter numbers

Premise No. *

Lookup

Meter No. *

Lookup

Premise Address

Address 1 *

Address 2

City *

State *

- Select -

Zip *

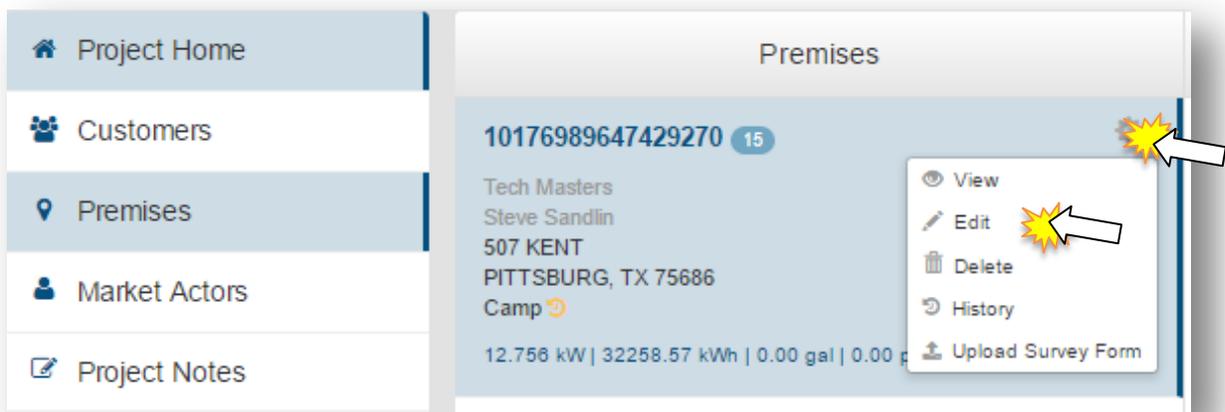


5. Click Save
6. Repeat Steps 1 to 5 when entering additional premises or if the Project includes Indoor and Outdoor Lighting and requires two Survey Form Uploads. **(Please see Upload Survey Form section on page 25 for more information)**

Edit Premise

Premises can be edited while the project is in Initiated and Work Completion Pending statuses. Once the project has been submitted for Final Approval, the premise data will not be editable.

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

Edit Premise

Construction Type *
Existing Building

For New Construction projects please enter "00000" for the premise and meter numbers

Premise No. *
4191489841984

Meter No. *
8419841954

Premise Address

Address 1 *
753 Grover St.

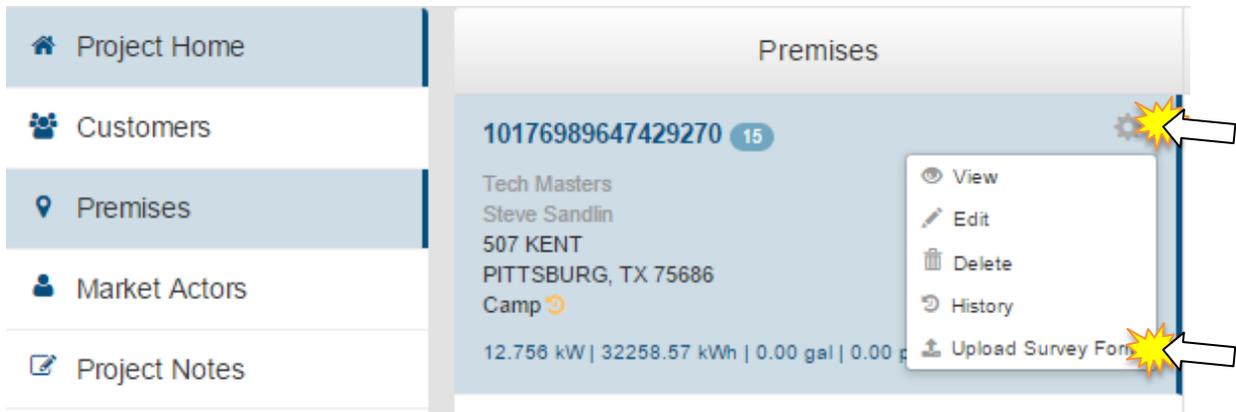
Address 2

7. Click Save

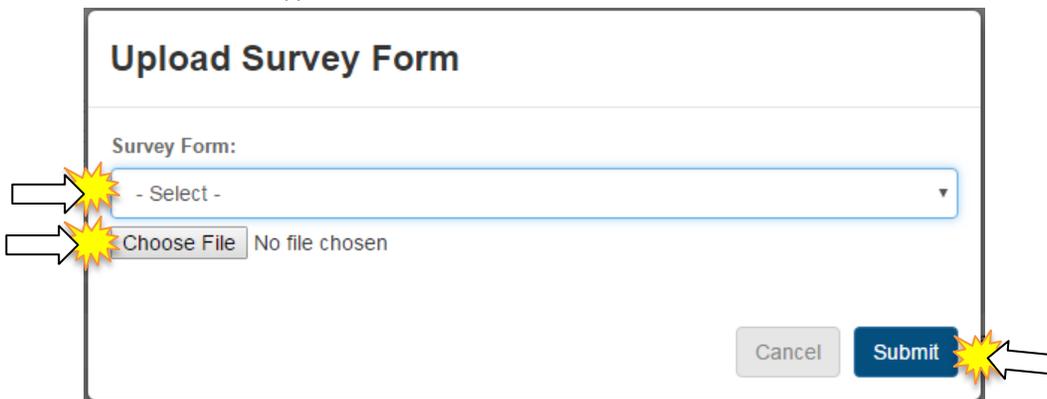
Upload Survey Forms

Commercial Programs have measures added via the Survey Form Upload. This form can be found on the Utility specific Program website, under the Documents section. Survey forms should be downloaded and filled out prior to beginning the Upload Survey Forms process.

1. Navigate to the Project List
2. Select a project that has the Customer and at least one premise added
3. Click on the Premises tab
4. In the Premise selection, click the drop-down menu in the top right corner



5. Select Upload Survey Form
 - a. Survey Form Upload modal will appear
6. Select the form type



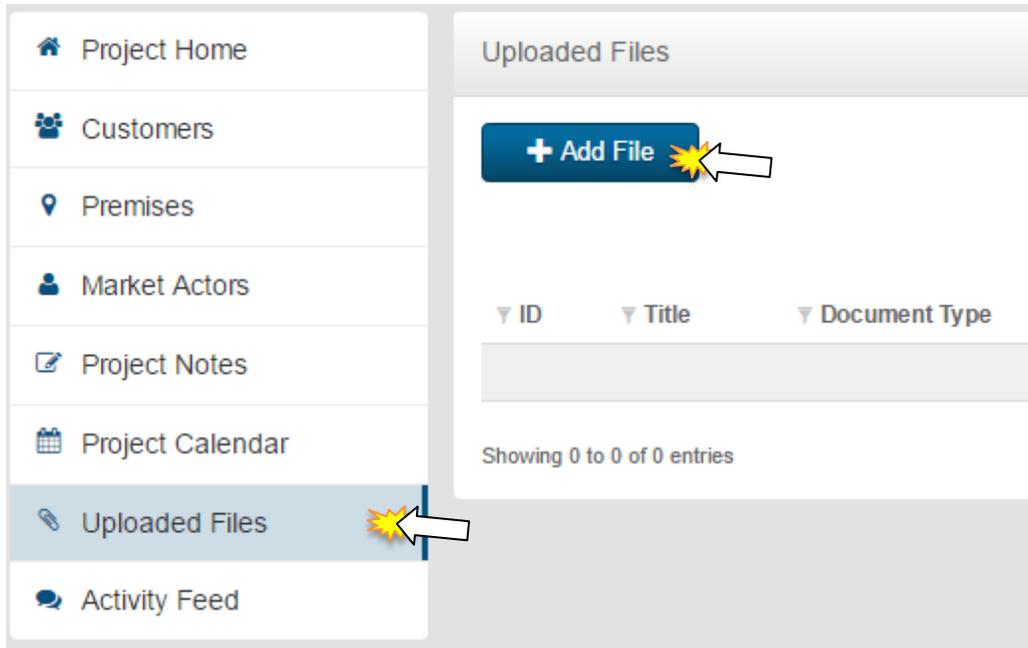
7. Click Browse & Select the file
8. Click Submit
 - a. File will be uploaded and viewable under the Uploaded Files section of the project
 - b. Premise will have measures added from the survey form
 - c. Incentives will be based on the information in the uploaded survey form and appear on the project
9. Repeat steps 4-8 for each additional premise

Uploading Project Documents

Project Documents are any documents that pertain to solely to the project itself. Examples are Commercial SOP agreements, installation notes, acknowledgments, and licenses. Please consult the Utility specific Commercial Program Manual for specific documents.

PLEASE NOTE: Documents are uploaded on a PROJECT basis. If premise-specific documents are uploaded, please use the title and notes section to designate the premise the document is related to. It is up to each Market Actor to determine their own naming conventions, as long as they clearly indicate the information.

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

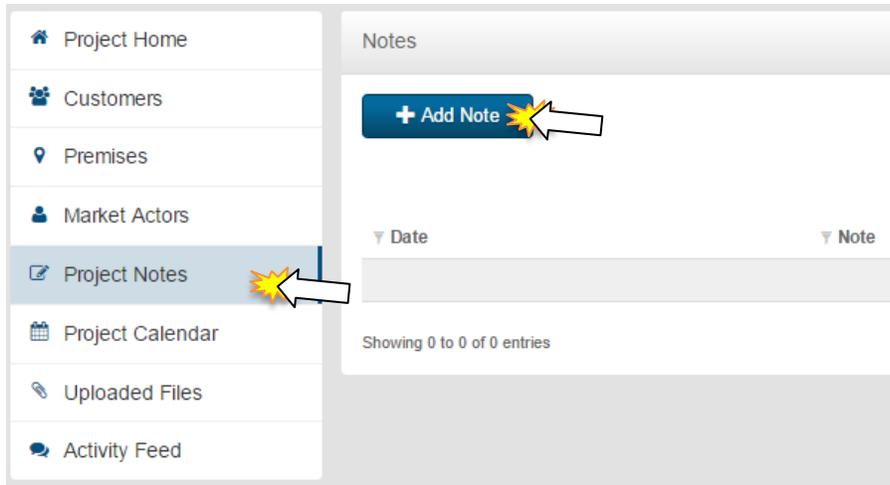
The screenshot shows a 'Add Document' form. It has four main sections: 'Title' with a text input field and a red asterisk; 'Document Type' with a dropdown menu showing '- Select -' and a red asterisk; 'Comment' with a large text area; and 'File' with a 'Browse' button and a red asterisk. At the bottom right, there are 'Cancel' and 'Save' buttons. A yellow starburst arrow points to the 'Save' button. Two other yellow starburst arrows point to the 'Title' and 'Document Type' fields.

9. Click Save

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

PROJECT PRE-APPROVAL

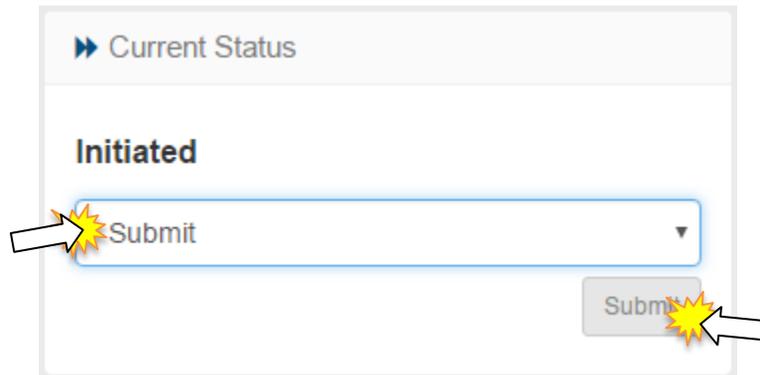
Project Pre-Approval requires that the following information has been added to the project:

- Customer information
- Premise (1+) information
- Survey Forms Uploaded
- Required Project documents

Follow the steps below to request Project Pre-Approval:

1. Confirm Project Customer, Premise, Survey Forms, and other documents are all filled out or uploaded
2. Go to the Current Status box at the top right of the project page

3. In the drop-down menu, select Submit



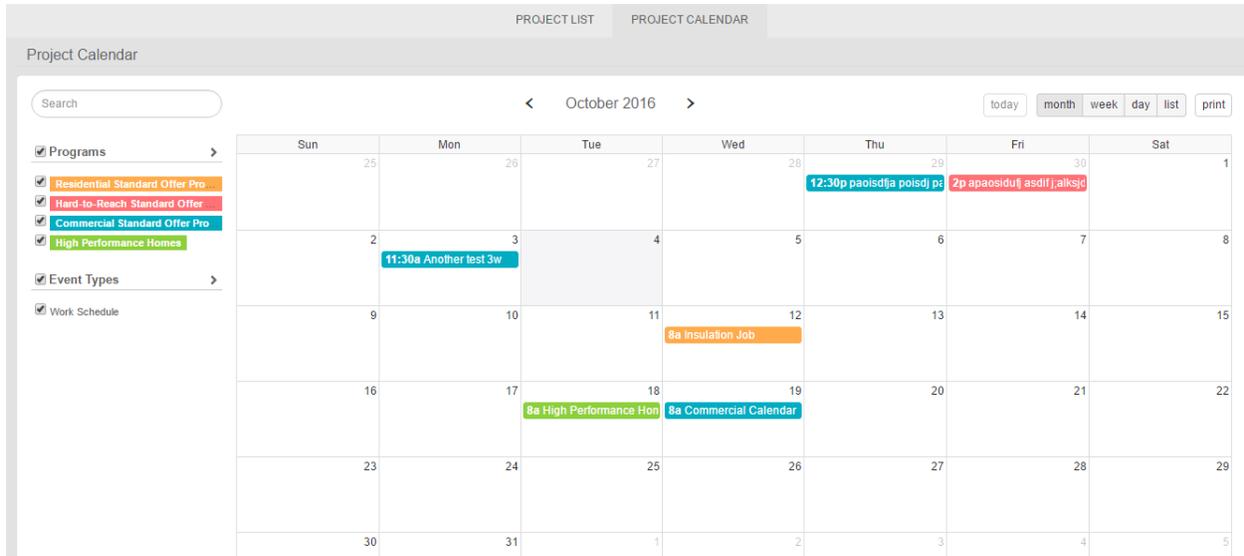
4. Click the Submit button
 - a. Confirmation message of request project Pre-Approval will appear on screen
 - b. Project status will change to Pre-Approval Pending
5. If any of the required information is missing you will receive a message on the screen indicating what requirements must be met in order to obtain project Pre-Approval.

Once an administrator has reviewed the project details, the project will be approved, denied, or sent back for more information. This is also where the Pre-Inspection generally takes place.

PROJECT CALENDAR

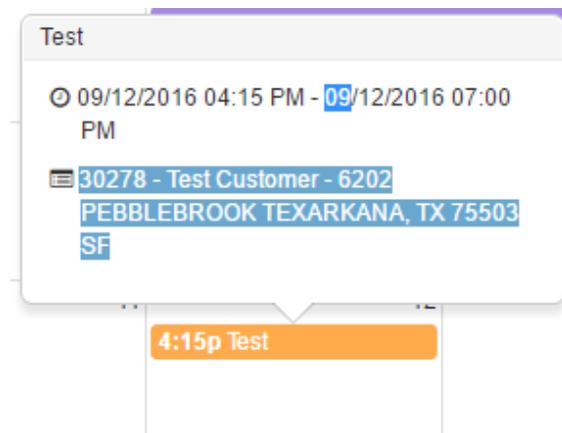
The Project Calendar is a tool that allows Market Actors to see all their project calendar entries in one consolidated calendar page. The Project Calendar has 4 views available – Month (default), Week, Day, and List.

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.



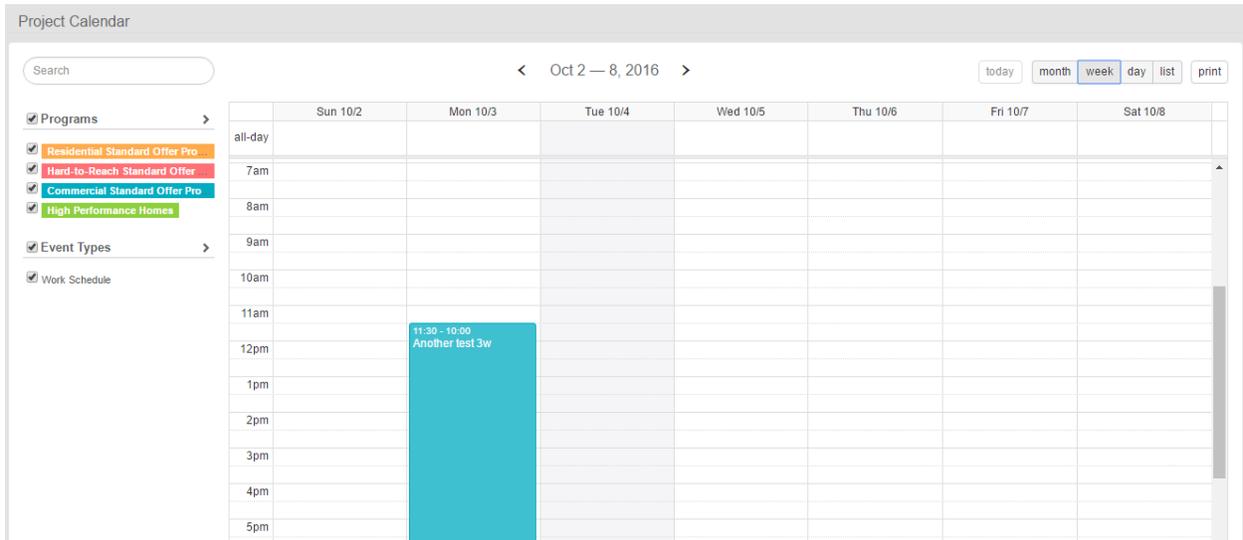
As a default view, the month calendar will display will all programs selected. If you are enrolled in specific programs, only those programs and their applicable work events will display.

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.

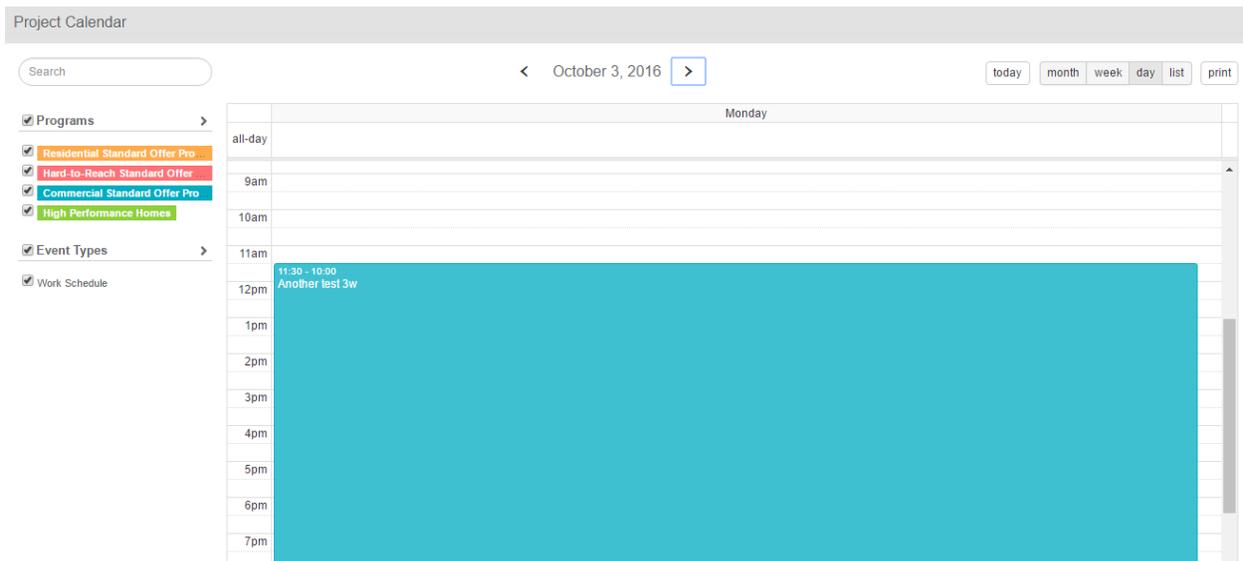


To view the other calendar items, simply click on the view desired at the top left of the calendar pane.

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

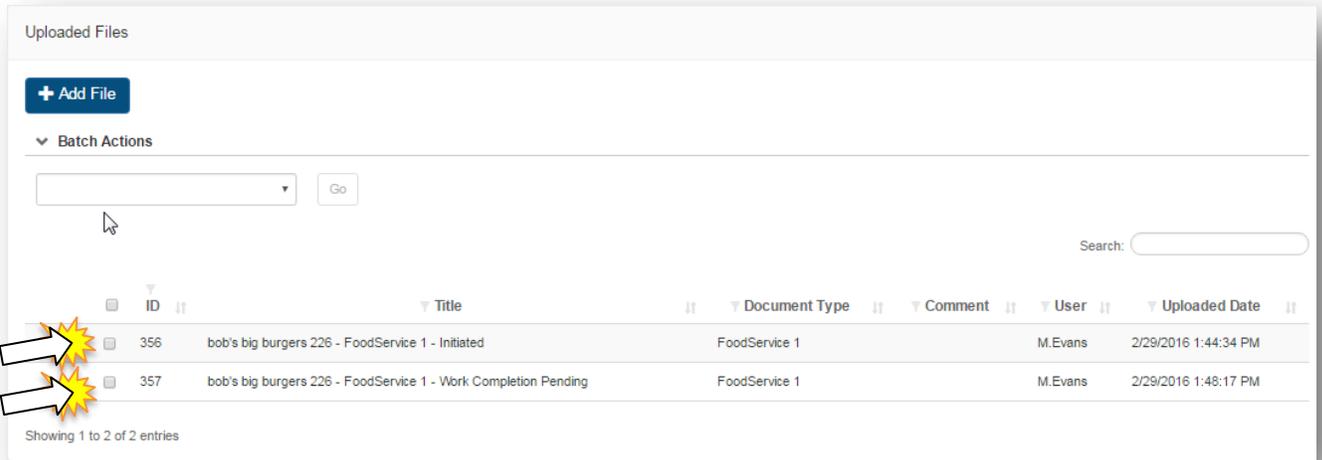
Search < October 2016 > today month week day list print

<input checked="" type="checkbox"/> Programs >				
<input checked="" type="checkbox"/> Residential Standard Offer Pro	10/19/2016			
<input checked="" type="checkbox"/> Hard-to-Reach Standard Offer	08:00 AM	Commercial Calendar Item	🏢 Test Company 1	Test Project
<input checked="" type="checkbox"/> Commercial Standard Offer Pro	10/18/2016			
<input checked="" type="checkbox"/> High Performance Homes	08:00 AM	High Performance Homes Calendar Item	🏢 Test Company 1	Test Company 1 - MF - 321 Mostest ave 319 Austin TX 78701
<input checked="" type="checkbox"/> Event Types >	10/12/2016			
<input checked="" type="checkbox"/> Work Schedule	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 asdifj,alksjdf	🏢 Test Company 1	95 - Vinny Cousin - 797 OLD ORCHARD LN 1-1004 LEWISVILLE, TX 75067 SF
	09/29/2016			



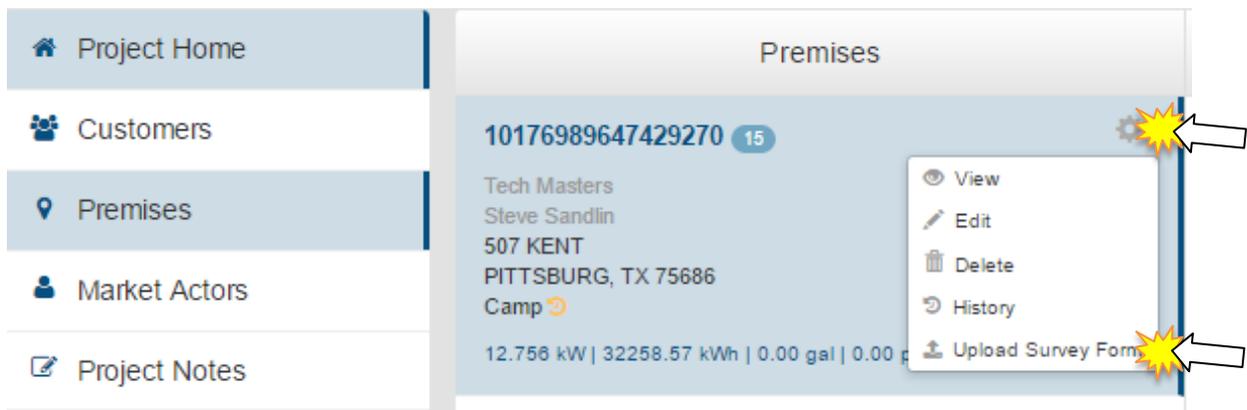
WORK COMPLETION PENDING

Once the project has been Pre-Approved it will move to Work Completion Pending status. It is during this stage that the work is completed and if necessary, a new Survey Form is uploaded to correctly represent the measures that were implemented. This new Survey Form upload will not overwrite the existing one uploaded during project initiation. Both Survey Forms will be available for viewing/deleting in the Uploaded Files section of the Project itself.



Editing/Updating 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. In the Premise selection, click the drop-down menu in the top right corner



5. Select Upload Survey Form
 - a. Survey Form Upload modal will appear
6. Select the form type
7. Click Browse & Select the file

The screenshot shows a modal window titled "Upload Survey Form". It contains a "Survey Form:" label above a dropdown menu currently set to "- Select -". Below the dropdown is a "Choose File" button and the text "No file chosen". At the bottom right, there are "Cancel" and "Submit" buttons. Three yellow starburst callouts with arrows point to the dropdown menu, the "Choose File" button, and the "Submit" button.

8. Click Submit
 - a. File will be uploaded and viewable under the Uploaded Files section of the project
 - i. Same file types will have the project status added to the name to identify when in the process they were uploaded
 - b. Premise will have measures updated from the new survey form uploaded
 - c. Incentives will be based on the information in the new uploaded survey form and appear on the project
9. Repeat steps 4-8 for each premise if more than one
10. Repeat steps 4-8 for each type of survey form if more than one

Deleting a Measure

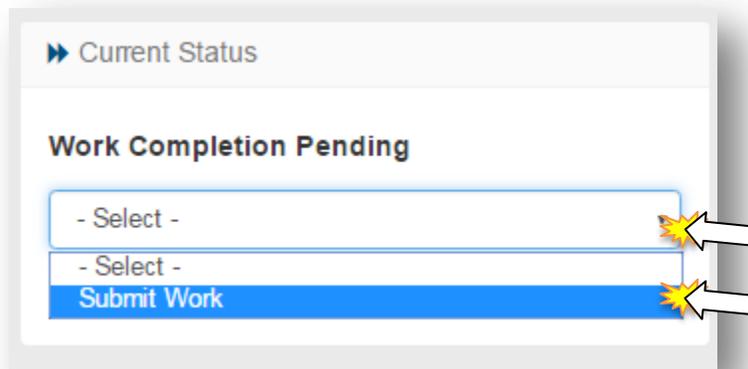
Measures are deleted through updating the survey form and performing the Edit/Update Measures steps. If a measure was on the original survey form uploaded, and is not on subsequent updated forms, then they will be removed from the project.

SOP Agreement

The Commercial SOP agreement will be sent to the Market Actor (Sponsor) at the Work Completion Pending stage. Your program Administrator will provide further instructions for uploading or returning a signed copy of the agreement.

SUBMITTING FOR FINAL APPROVAL

1. Confirm Project measures for each premise are completed
2. Confirm that additional documentation is not required. Please see the Utility specific Commercial Program manual for more information.
3. Go to the Current Status box at the top right of the project page
4. In the drop-down menu, select Submit Work
5. Click the Submit button
 - a. Submission of project confirmation will appear
 - b. Project status will be Final Approval Pending



6. The Project will be reviewed by the Program Administrator and either Approved, Sent Back for corrections or Denied. You will receive an email indicating the status and any additional notes if deemed necessary.

Project Approval

Approved Projects will be indicated with a status of Approved and Market Actor will be notified of Approved status by email

Project Sent Back

Projects that are Sent Back to a Market Actor require additional follow-up per the Program Administrator. Project will revert back to Work Completion Pending status to allow the Market Actor the opportunity to make the necessary changes. Project can then be submitted once again for Final Approval.

Project Denied

Projects that are denied by the Program Administrator are indicated with a status of Denied and Market Actor will not be able to make additional changes or updates to the Project.

Project Payment

Once a project has been approved it will be invoiced by the Program Administrator and payment made. Project status will be indicated as Payment Pending (Invoicing) and Paid. Market Actor will receive email notification once Payment has been made.

