

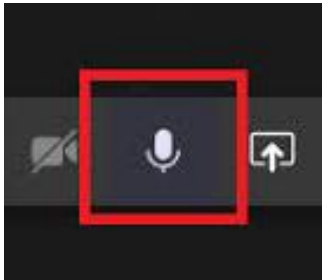


## **SMART Source<sup>SM</sup> Solar PV Program**

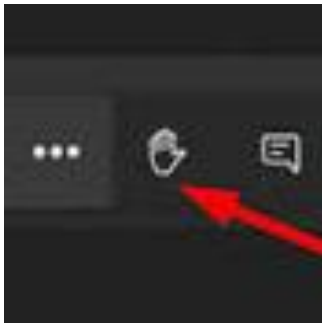
### **2021 Kickoff**

**Thursday, December 17, 11 a.m. Central**  
**Please keep your line muted!**

# Housekeeping



Please keep your line muted



Raise your virtual hand or ask questions using the text messaging in Teams (your messages will be viewable by all participants)



We'll try to address all questions at the end. If there are questions we can't address today, we'll follow up via email. Note this webinar is being recorded.

# Agenda

## What we'll cover:

- 2020 Successes and Challenges
- Key updates in 2021
- 2021 Program Overview
  - Utility service areas
  - Service provider/customer eligibility
  - Program budgets, incentive levels, limits
- Submitting your Enrollment Application on P3
- Seeking Your Input
- Contact and Questions

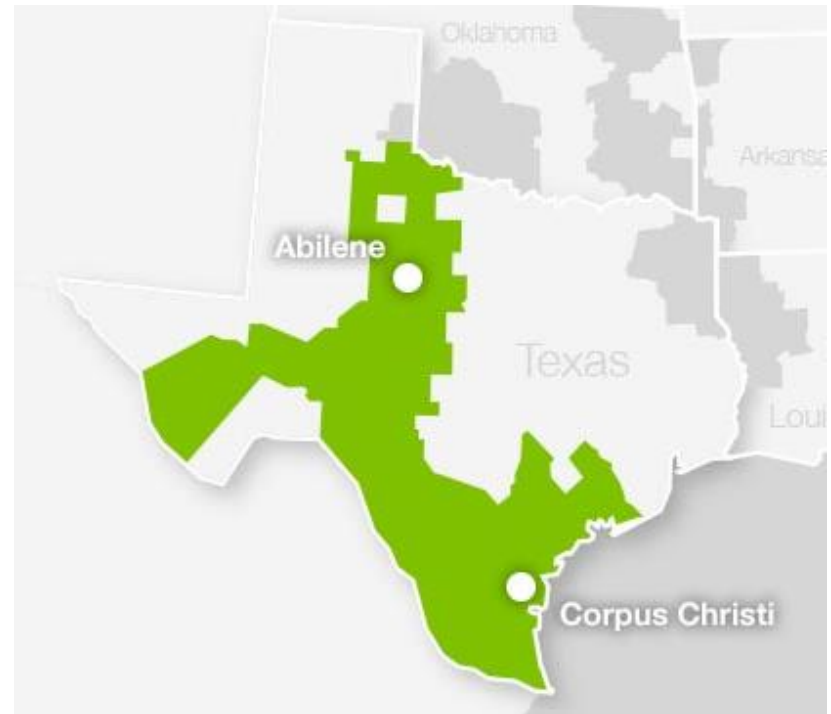
# 2020 Successes and Challenges

- Successes
  - 59 residential projects, 615 kWdc installed
  - 10 commercial projects, 848 kWdc installed
  - 2,047,000 kWh annual energy savings
  - 556 kW demand savings
  - Dealing with COVID-19
- Challenges
  - Late completions/extension requests
  - Commercial projects in western region
  - Dealing with COVID-19

# 2021 - Key Updates

# 2021 - Key Updates

- AEP Texas
  - Transitioning to a single AEP Texas
    - Central and North divisions merging
    - But still different budgets by region and for residential and commercial programs



# 2021 - Key Updates



**PROGRAM PORTFOLIO PORTAL**

- 100% Online Interface
  - P3 system will enable fully online:
    - Market actor (formerly “service provider”) application and enrollment
    - Project funding application and approval
    - Notification of final installation/inspection/payment
    - All documentation uploads required for each step

# 2021 - Key Updates

- P3 Enrollment application stage starts now, and continues through Dec. 31, 2020
  - In January 2021, Frontier will approve or deny enrollment applications, based on:
    - Past program performance
    - Geographic coverage offered
    - Services offered
  - Program will open for approved applicants to begin submitting projects for funding in 2021 (date tbd)
  - We'll offer an additional training webinar for approved applicants before this stage opens



# 2021 - Key Updates

- Program budgets will remain the same as last year
  - Considering iterative budget releases
    - 50% available on program start, 75% 3 months later, 100% by June 30;
    - We request your feedback on this idea

# 2021 - Key Updates

- Incentives offered:
  - Residential moving to new fixed incentive structure
  - Commercial retains existing tiered rate structure, no change to incentive rates, but no early completion bonus will be offered

# 2021 Programs Overview

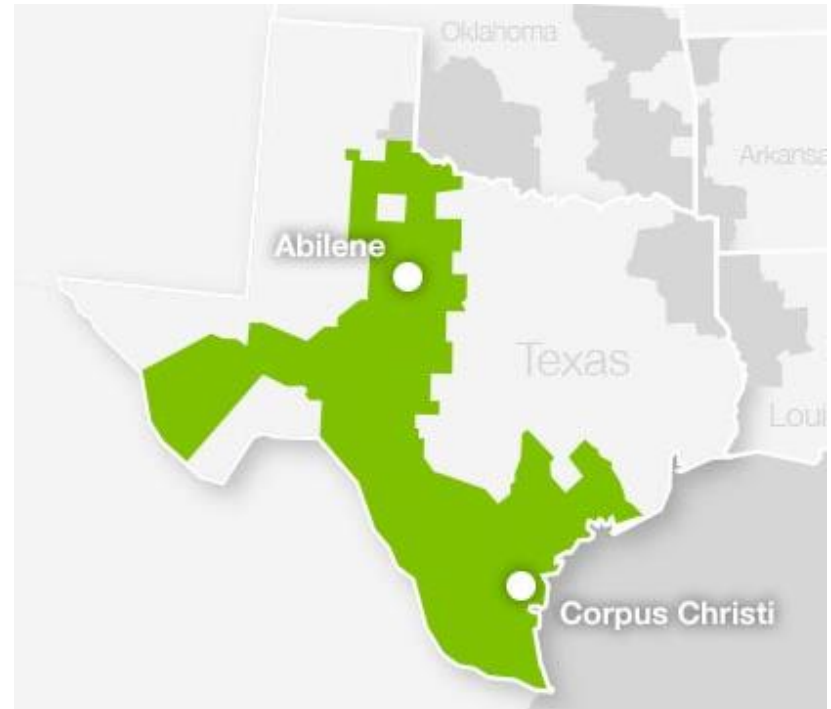
# 2021 Programs Overview

## AEP Texas Service Area

- New single service area (but still operate as if there are separate programs for TCC and TNC)
- Jim Fowler is the Program Manager, [jjfowler@aep.com](mailto:jjfowler@aep.com)

## Frontier Energy

- Administers the Program(s) for AEP Texas
- Key contacts are:
  - Rob Lovenguth, [rlovenguth@frontierenergy.com](mailto:rlovenguth@frontierenergy.com)
  - Tracie Cooper, [tcooper@frontierenergy.com](mailto:tcooper@frontierenergy.com)
  - Steve Wiese, [swiese@frontierenergy.com](mailto:swiese@frontierenergy.com)



# 2021 Programs Overview

## Market Actor eligibility

- Insurance and W9:
  - GL insurance with minimum limits of \$500k per occurrence and \$500k general aggregate; BI/PD \$500k general aggregate, should name Frontier Energy as additional insured
- Must agree
  - To comply with all program requirements
  - That only licensed electrical contractors and licensed electricians will offer, perform and permit all associated electrical work
- Minimum Qualification
  - TECL + NABCEP Certified Installer, or
  - TECL + qualified to sit for NABCEP Certified Installer exam, or
  - TECL + 40 hours solar training (min)



# 2021 Programs Overview

## Customer eligibility

- Served by AEP Texas at the distribution level
- First 9 digits of ESI ID on electric bill identify the distribution utility
  - 100327894 or 102040497
- Residential or commercial determined by rate class at meter
- P3 will allow ESI ID lookup to assist with data entry and eligibility determination

### AEP Texas

**100327894** **01234567**  
Company code Premise ID#

or

**102040497** **01234567**  
Company code Premise ID#

# 2021 Programs Overview

## 2021 Budgets

- Residential - \$270,000 total (divided by region)
- Commercial - \$253,590 total (divided by region)
- In both programs, TCC region budget is about double the TNC budget

## 2021 Incentive Levels

- Residential - fixed incentive structure
  - 3-4.999 kWdc = \$1,500
  - 5-7.499 kWdc = \$2,250
  - 7.5+ kWdc = \$3,000*– One time access to program (no future solar incentives for subsequent additions at same address/meter)*
- Commercial - retains existing tiered rate structure
  - \$0.50/Wdc for first 0-25 kWdc
  - \$0.25/Wdc for next 25-200 kWdc
  - \$0.00/Wdc for additional kWdc*– No early completion bonus*

# 2021 Programs Overview

## Project Size Limits

- Estimated annual energy production from all generation sources must be  $\leq$  estimated annual energy consumption

## Incentive Limits

- Maximum incentive per project/per customer
  - \$3,000 residential
  - \$56,250 non-residential (incentives up to 200 kWdc)
- Per service provider/project owner
  - Residential: 30% of available program funding
  - Commercial: \$56,250
- Open Season – limits removed July 1, 2021 if funding has not been claimed



# Program Websites

- **Existing program website**
  - <http://www.txreincentives.com/>
  - Public information, announcements
  - Program guidebook (when available)
- **P3**
  - <https://tcc.p3.enertrek.com> and <https://tnc.p3.enertrek.com>
  - Current budget and project status
  - All project data entry

# 2021 Tracking System

## P3 – Program Portfolio Portal

# P3 Registration

<https://tcc.p3.enertrek.com> and <https://tnc.p3.enertrek.com>

ENERTREK

Log In

Email address \*

Password \*

☐ Remember me

Log in

[Forgot password?](#)

[Need help getting started?](#)

Log in with

Google

Facebook

or

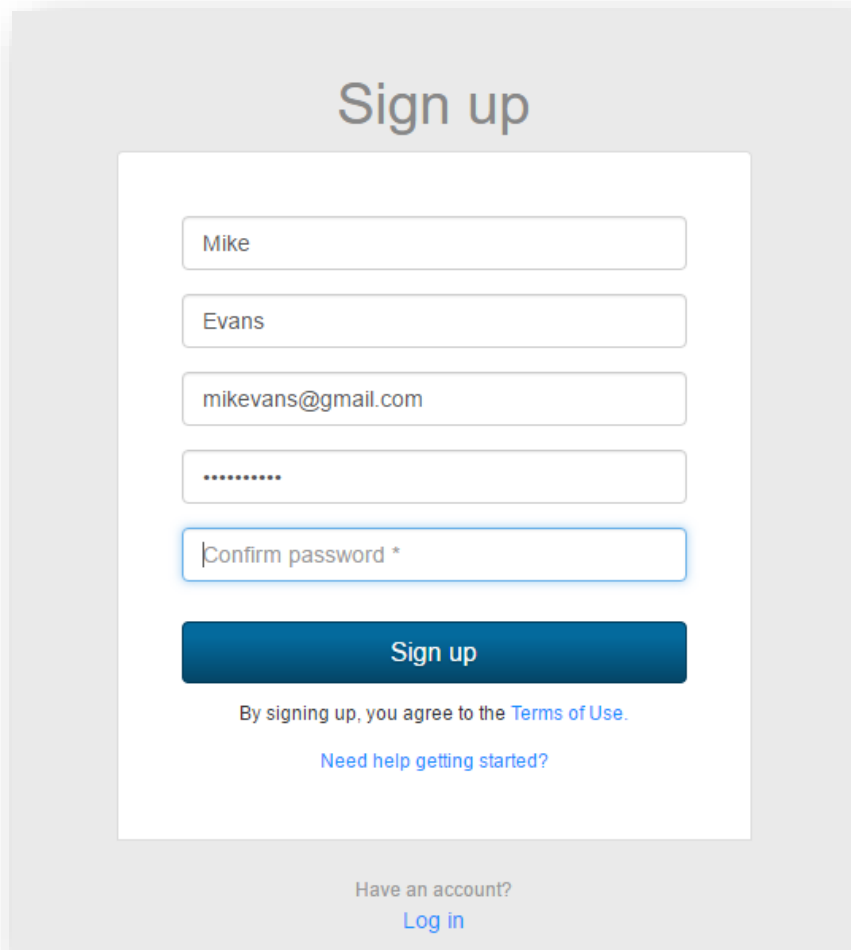
If you have not linked your Google and/or Facebook account with your P3 account, you can link from User Profile page.

Sign up now

[Create account](#)

- ★ Select the “Create account” link in blue on the login page
- ★ Or login using your Google or Facebook account

# P3 Registration



The screenshot shows a 'Sign up' form with the following fields and elements:

- Sign up** (Section Header)
- (First/Last Name)
- (Email Address)
- (Email Address)
- (Password)
- (Confirm Password)
- (Sign up Button)
- By signing up, you agree to the [Terms of Use](#).
- [Need help getting started?](#)
- Have an account? [Log in](#)

- ★ Users will be asked to provide the following:
  - ★ First/Last Name
  - ★ Email Address
  - ★ Password
- ★ Please note that the email address and password provided will be your username and password going forward when accessing P3



## Log in

☐ Remember me[Forgot password?](#)[Need help getting started?](#)[Sign up now](#)[Create account](#)

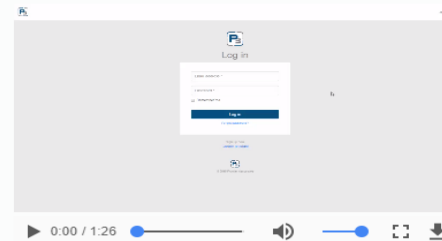
★ New P3 users can also access our P3 video tutorials by clicking the “Need help getting started?” link on the login page.

### Getting Started with P3

to get started with the P3 Platform, please watch the video tutorials below.

#### P3 Registration Process Video Tutorial

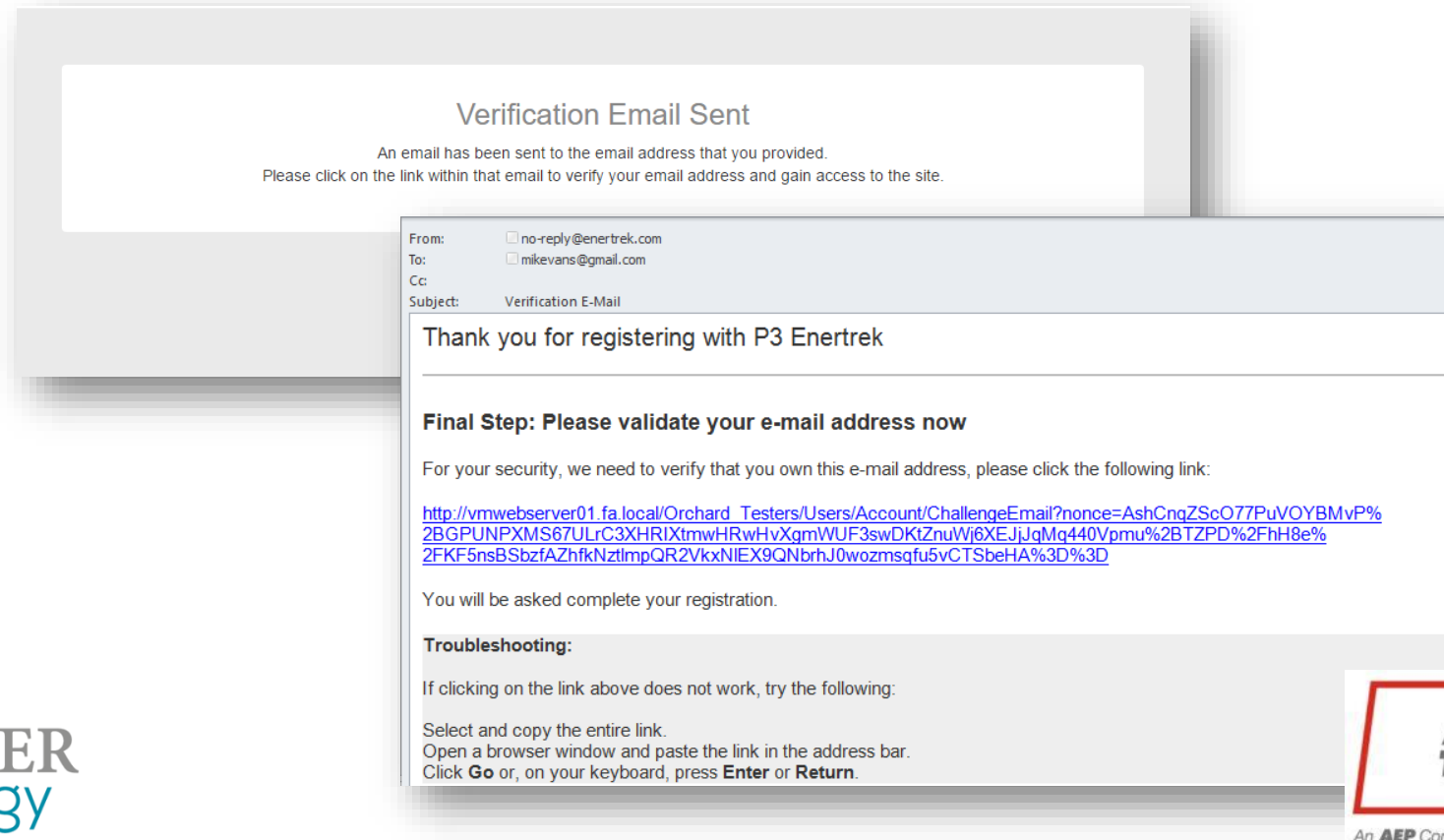
See how easy it is to use P3. Watch our Registration tutorial below to get started.



How to create your P3 Market Actor User Profile

# P3 Email Validation


- ★ Users will be sent a verification email to the email address provided
- ★ Please check your email spam/junk folders if you do not receive this email within 5 minutes



# P3 Market Actor Profile Set-Up

## 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

- ★ Select the Market Actor icon and click the Next button

# P3 Market Actor Profile Set-Up

## Complete Market Actor Profile

Verify Tax ID >

Profile Form >

Submit Profile >

### Verify Tax ID

Provide your company's tax identification number to determine if this company already has a profile created.

Tax ID should be input as **nine digits without hyphens**.

Back

Next

★ Users will need to provide basic company information including their Tax ID, Address, and company contact information



# P3 Market Actor Profile Set-Up

## Complete Market Actor Profile

Verify Tax ID >

**Profile Form >**

Submit Profile >

☐ Minority Owned

☐ Disabled Veteran Owned

Company Contact First Name \*

Mike

Company Contact Last Name \*

Evans

Phone 1 \*

(555)555-5555

Phone 2 \*

(555)444-4444

Email \*

mikevans@gmail.com

Physical Address 1 \*

Back

Next

# P3 Market Actor Profile Set-Up


## Complete Market Actor Profile

Verify Tax ID >

Profile Form >

**Submit Profile >**

### Submit Profile



**Sanders Construction**

Your profile is now ready to submit.

Back

Submit

# P3 Program Enrollment Process

# P3 Enrollment Overview

- ★ Users will need to create an enrollment application for the program(s) they wish to participate in
- ★ Users that wish to apply to more than one program will need to complete separate enrollment applications for each applicable program
- ★ Enrollment applications can be saved and users can return to the application at any time to complete it
- ★ Enrollment applications must be submitted in order to be reviewed and approved by the Utility Administrator

# P3 Enrollment Application

- ★ After logging in, navigate to the Programs Icon at the top of the screen
- ★ Select Enrollments from the drop-down menu

The screenshot displays the P3 Enrollment Application dashboard. At the top, there is a navigation bar with icons for HOME, DASHBOARD, PROGRAMS, and PROJECTS. The user's email, mikevans@gmail.com, is shown in the top right corner. Below the navigation bar, a dropdown menu is open under the PROGRAMS icon, showing options for Program List and Enrollments. A blue arrow points to the Enrollments option. The main content area is divided into two sections: Quick Tasks and Upcoming Work Schedule. The Quick Tasks section contains two cards: Review New Projects and View Project Calendar. The Upcoming Work Schedule section is currently empty. At the bottom of the dashboard, there is a footer with the Frontier Energy logo, the text 'Activity Programs', and the AEP Texas logo with the text 'Activity Fee' and 'An AEP Company'.

HOME DASHBOARD PROGRAMS PROJECTS

mikevans@gmail.com

Program List

Enrollments

Welcome Back

Quick Tasks

Review New Projects

View Project Calendar

Upcoming Work Schedule

View Project Calendar

Activity Programs

Activity Fee

AEP TEXAS

An AEP Company

# P3 Enrollment Application

★ Select the + New Enrollment button in blue

HOME DASHBOARD PROGRAMS PROJECTS

PROGRAM LIST ENROLLMENTS

Enrollments

+ New Enrollment

Show 10 entries

Print Excel CSV

Program Enrollments

ID	Program	Status	Created	Submitted	Approval Amount	Submitted Amount
No data available in table						

Showing 0 to 0 of 0 entries

FRONTIER energy

AEP TEXAS  
An AEP Company

# P3 Enrollment Application

- ★ The New Enrollment modal will appear
- ★ Select the program you wish to apply to from the drop-down menu
- ★ Click the Submit button to continue

*Please note: You only need to register for the Residential solar program (we will copy your information to the Commercial solar program if you indicated that you wish to enroll in both on the enrollment form)*

The screenshot displays the P3 Enrollment Application interface. A modal titled "New Enrollment" is open, featuring a "Select Program" dropdown menu. The dropdown is open, showing two options: "- Select -" and "Residential Solar PV Program". The background interface includes a "P3" logo, a "New Enrollment" button, a "Show 10 entries" dropdown, a search bar, and a table with columns for "ID", "Program", and "Submitted". The table is currently empty, displaying "No data available in table".

# P3 Enrollment Application

- ★ The enrollment application will be displayed
- ★ All required fields are indicated with a red \* asterisk

The screenshot displays a web application interface for P3 Enrollment. At the top, there is a navigation bar with icons for HOME, DASHBOARD, PROGRAMS, and PROJECTS, along with a user profile for mikevans@gmail.com. Below the navigation bar, there are tabs for PROGRAM LIST and ENROLLMENTS. The main content area is titled "Enrollment Details" and is divided into two columns. The left column, titled "Residential Solar Program", displays enrollment information: Enrollment ID: 20058, Submission Star...: 1/23/2016 12:00:00 AM, Created: 10/28/2016 (M.Evans), Submitted: (empty), and Current Status: Created (indicated by a blue button). The right column, titled "Market Actor Information Summary", displays company information: Company Name: Evans HVAC, Company DBA: (empty), Contact Name: Mike Evans, Phone: (555)555-5555, and Physical Address: 123 Main Street Austin, TX 78746. A link "View Company Profile" is located at the bottom right of the right column. Below the enrollment details, there is a section titled "Enrollment Form".

HOME DASHBOARD PROGRAMS PROJECTS

mikevans@gmail.com ▼

PROGRAM LIST ENROLLMENTS

Enrollment Details

**Residential Solar Program**

Enrollment ID: 20058  
Submission Star...: 1/23/2016 12:00:00 AM  
Created: 10/28/2016 (M.Evans)  
Submitted:  
Current Status: **Created**

**Market Actor Information Summary**

Company Name: Evans HVAC  
Company DBA:  
Contact Name: Mike Evans  
Phone: (555)555-5555  
Physical Address: 123 Main Street Austin, TX 78746

[View Company Profile](#)

Enrollment Form



# P3 Enrollment Application

- ★ Users have the option of saving the application or submitting it for approval
- ★ Please note that once an application has been submitted, you will no longer have the ability to make edits to the application

## Program Qualifications

Applicant must demonstrate program qualifications as shown below, and must provide documentation supporting the highest listed qualification.

Applicant is a licensed Texas Electrical Contractor, and:

☒ I employ at least one full-time regionally-based employee who is currently certified by the North American Board of Certified Energy Practitioners (NABCEP) as a PV Installer (NABCEP PV Installer certification, not the entry level certification also offered by NABCEP) and I have uploaded a copy of my NABCEP certification to my Company Profile.

or,

☐ I employ at least one full-time regionally-based employee who has been determined by NABCEP to be eligible to sit for the NABCEP PV Installer exam (Please see [www.nabcep.org](http://www.nabcep.org) for more details on eligibility requirements) and I have uploaded written notification from NABCEP of eligibility to sit for the exam to my Company Profile.

or,

☐ I employ at least one full-time regionally-based employee who has completed at least 40 hours of PV installation training provided by a third party and I have uploaded a copy of certificate showing 40 hours of PV training to my Company Profile.

## Texas Electrical License

License #: \*

2547887

Expiration Date: \*

12/29/2021

☒ I have uploaded a copy of my Texas Electrical Contractor/Master Electrician license to my Company Profile \*

## AEP Texas Central Division Program Agreement

[2021 AEP Texas Solar PV Agreement](#)

☒ I confirmed that I have read and agree to the Participation Agreement and uploaded a signed copy to my Company Profile \*

☒ I am interested in participating in the Commercial Solar PV program and would like to apply this enrollment to the 2021 AEP Texas Commercial Solar PV Program. \*



# P3 Enrollment Application

- ★ Once the application has been submitted, it will be displayed on the Program Enrollments table
- ★ Once the application has been Pre-Approved, Approved or Denied, the status will be updated on this table and an email will be sent to you

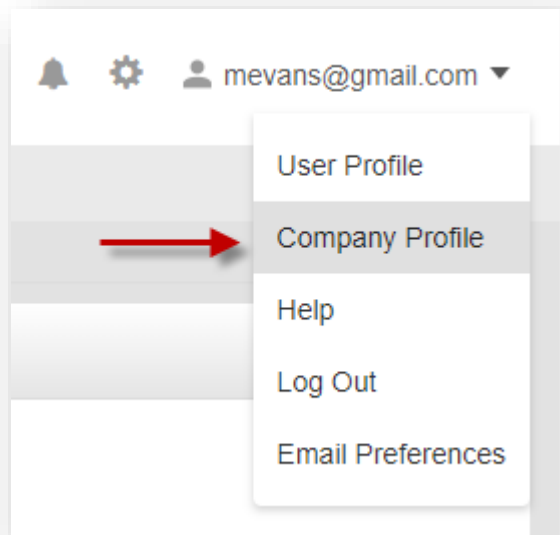
The screenshot displays a web application interface for managing enrollments. At the top, there is a navigation bar with icons and labels for HOME, DASHBOARD, PROGRAMS (which is the active tab), and PROJECTS. A user profile icon and email address (mikevans@gmail.com) are visible in the top right corner. Below the navigation bar, a green banner message states "Your enrollment has been submitted". The main section is titled "Enrollments" and contains a "+ New Enrollment" button. Below this, there is a "Show 10 entries" dropdown and three buttons for "Print", "Excel", and "CSV". The central part of the interface features a table titled "Program Enrollments" with the following data:

ID	Program	Status	Created	Submitted	Approval Amount	Submitted Amount
20058	Residential Solar Program	Submitted	10/28/2016	10/28/2016		\$0.00

Below the table, it indicates "Showing 1 to 1 of 1 entries". At the bottom left is the "FRONTIER energy" logo, and at the bottom right is the "AEP TEXAS" logo with the tagline "An AEP Company".

# P3 Required Company Documents

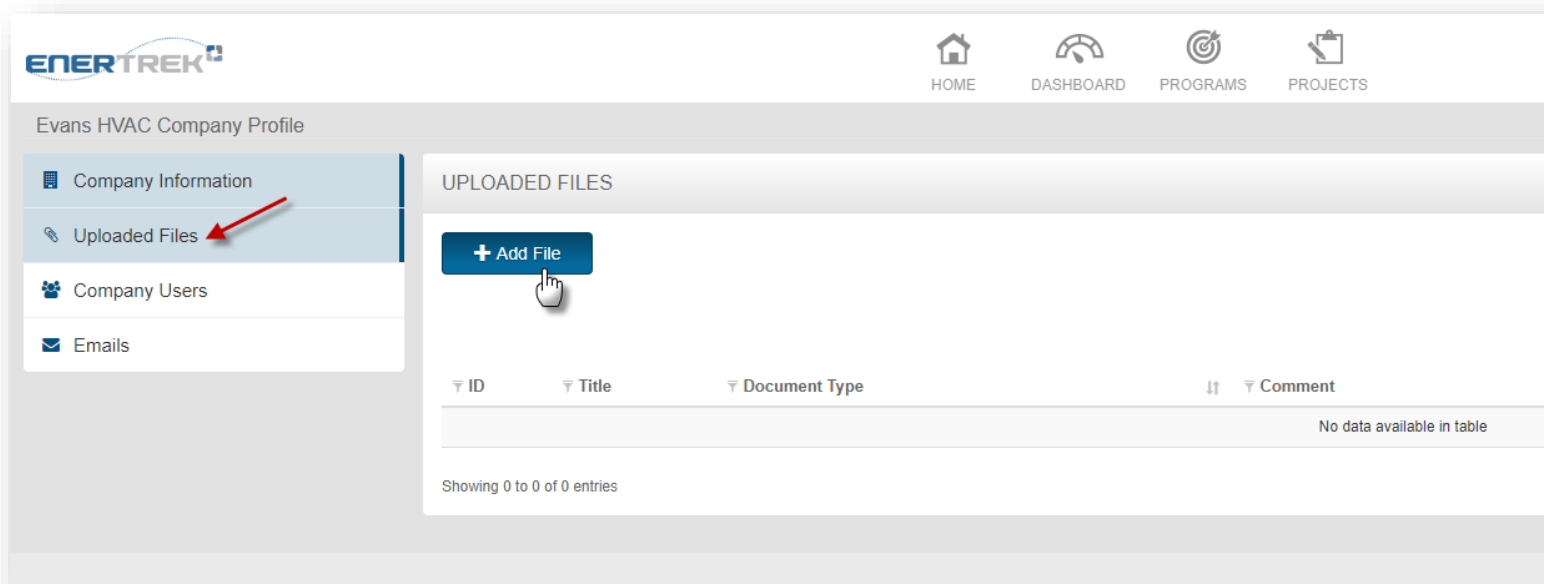
The Company Profile section is where Market Actors will upload certifications, licenses, W9s and any other required documentation relating to their Enrollment Application



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

# P3 Required Company Documents

★ Go to the **Uploaded Files** tab and select the + Add File button in blue

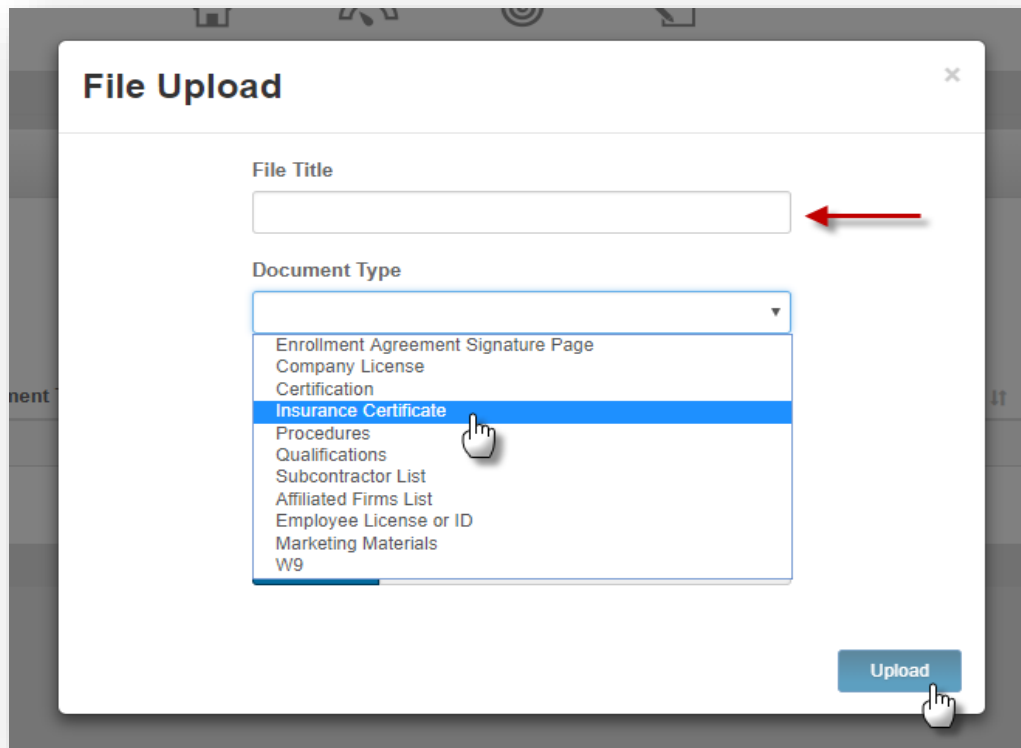


★ Five (5) files you will need to upload at the Enrollment application stage:

- ★ COI
- ★ TECL Contractors license
- ★ W9
- ★ NABCEP and/or training status
- ★ Signed copy of AEP Texas Solar PV Participation Agreement  
(download is available from the Enrollment form)

# P3 Required Company Documents

The File Upload modal will appear



The screenshot shows a 'File Upload' modal window. It has a title bar with a close button. Inside, there is a 'File Title' text input field with a red arrow pointing to it. Below that is a 'Document Type' dropdown menu. The dropdown is open, showing a list of document types: Enrollment Agreement Signature Page, Company License, Certification, Insurance Certificate (highlighted with a blue bar and a mouse cursor), Procedures, Qualifications, Subcontractor List, Affiliated Firms List, Employee License or ID, Marketing Materials, and W9. At the bottom right of the modal is an 'Upload' button with a mouse cursor over it.

- ★ Enter the file title
- ★ Select the type of file being uploaded
- ★ Enter any notes associated with the file
- ★ Select the file by clicking the Browse button
- ★ Select Upload
- ★ Repeat steps 3-4 for each required document

# P3 Support

Tracie Cooper  
Sr. EnerTrek Analyst II  
Frontier Energy  
[tcooper@frontierenergy.com](mailto:tcooper@frontierenergy.com)  
737-236-0246



**PROGRAM PORTFOLIO PORTAL**



# What to do next

1. Complete P3 Registration and Market Actor Profile at <https://tcc.p3.enertrek.com> and/or <https://tnc.p3.enertrek.com>
    - Sign up, email validation, set up Market Actor profile (basic company information, contacts, address, etc.), enter tax ID, remember to hit “Submit”
  2. Next, Apply for Enrollment in the Residential Program(s)
    - Complete and submit the online Enrollment Application form (and indicate your interest in the Commercial program on the form)
    - Submit all required documentation to Company Profile (W9, COI, TECL, NABCEP/training, Participation Agreement)
- Complete these tasks for TNC and TCC by December 31, 2020
  - We will get back to you in January

# Thank You!



Program questions: **Rob Lovenguth**, [rlovenguth@frontierenergy.com](mailto:rlovenguth@frontierenergy.com), 737-443-7841

P3 user questions: **Tracie Cooper**, [tcooper@frontierenergy.com](mailto:tcooper@frontierenergy.com), 737-236-0246

**Also:**

**Steve Wiese**, [swiese@frontierenergy.com](mailto:swiese@frontierenergy.com), 737-236-0255

**Jim Fowler**, [jjfowler@aep.com](mailto:jjfowler@aep.com)