

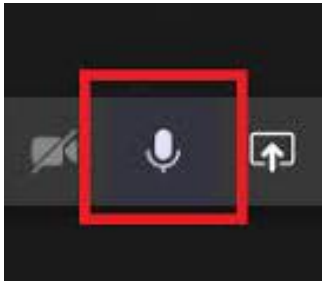


SMART SourceSM Solar PV Program

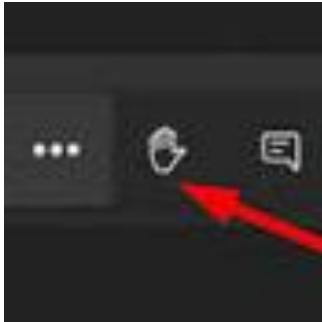
2021 Kickoff – Part 2

Thursday, February 25, 2 p.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

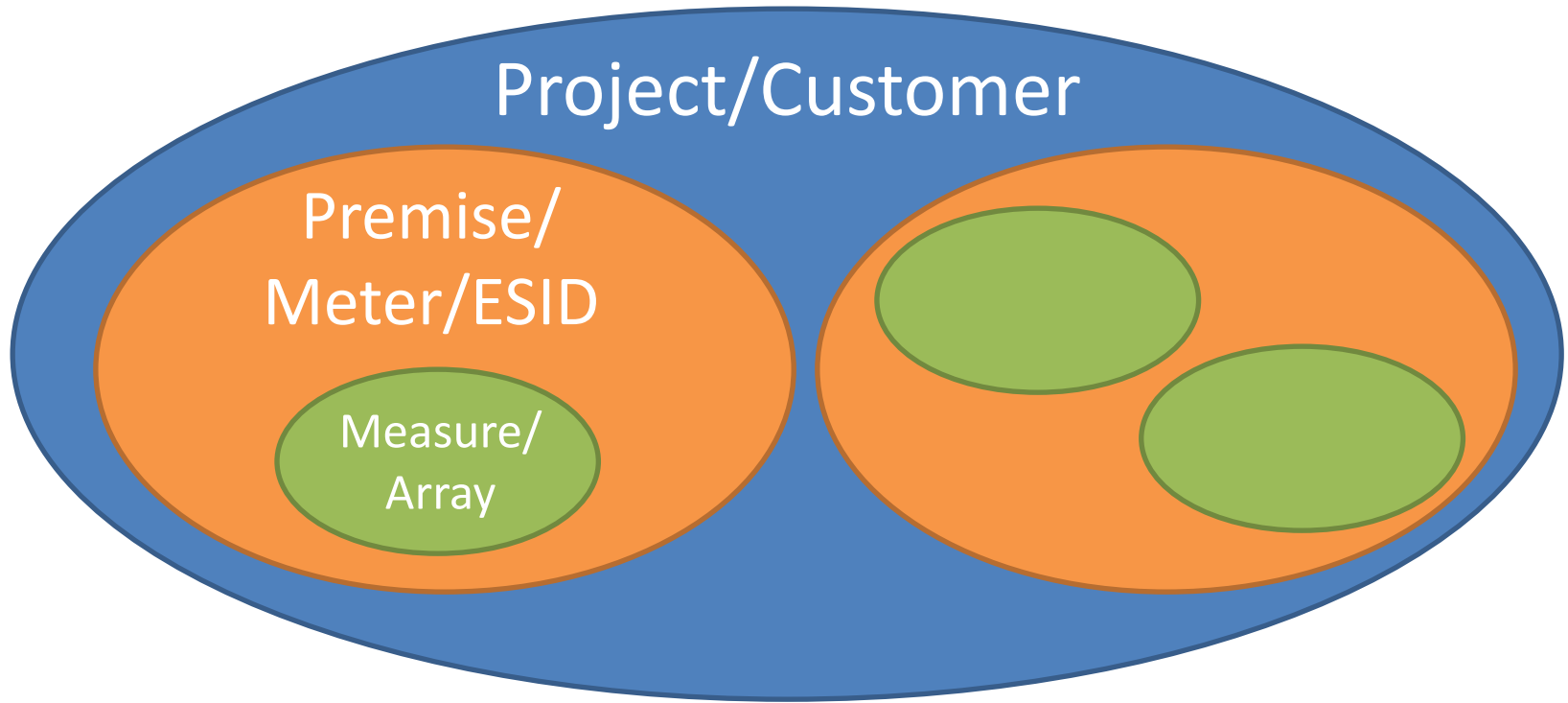
In December we covered:

- 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 with P3

Today we'll cover:

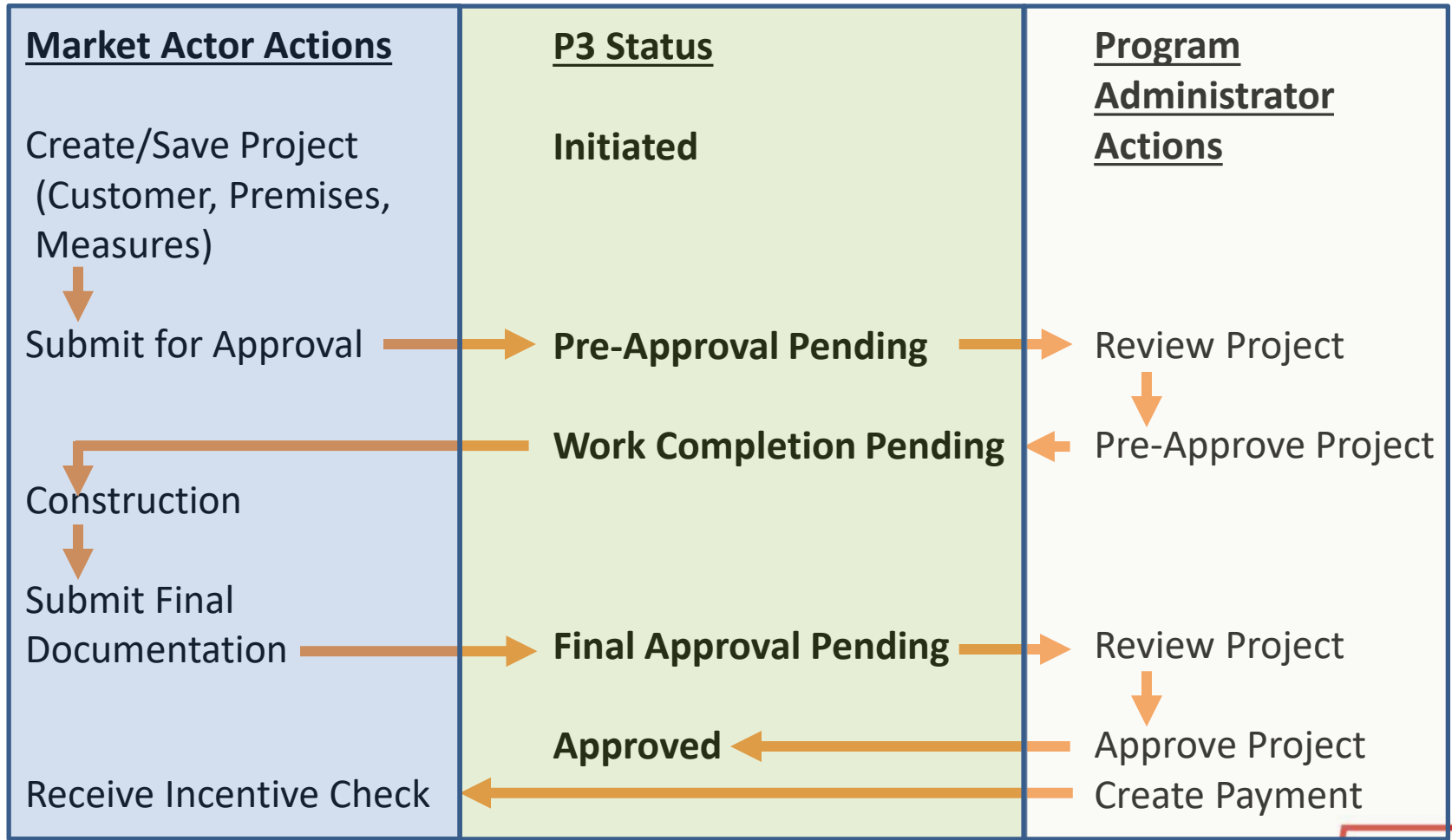
- Defining Projects, Customers, Premises, ESIDs/meters, Measures in P3
- P3's Project Flow
- Submitting your Project Applications using P3 (slides and live demo)
- Additional Tips
- To Do List before Open

P3 Conceptual Hierarchy



Nearly all residential projects will have a single customer, a single premise, and one or more measures. Commercial projects might have multiple premises.

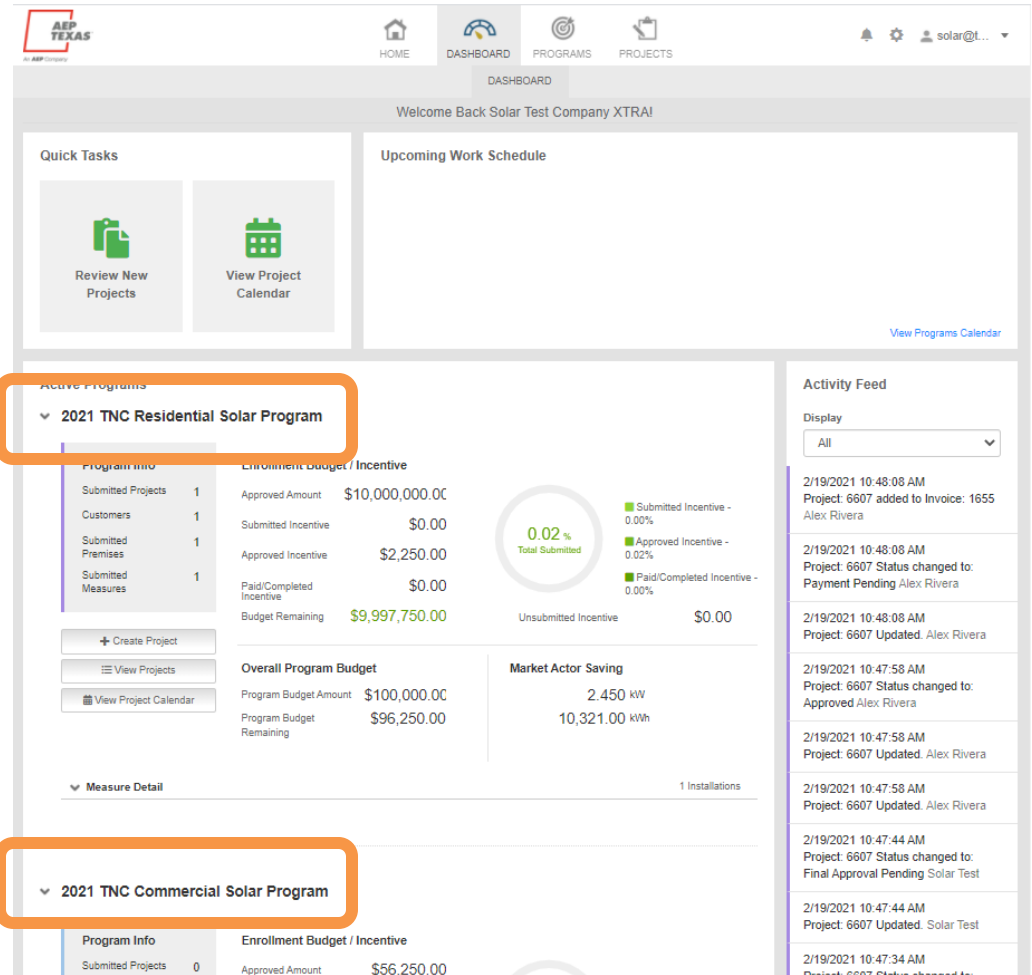
P3 Project Flow



Log in to P3

- Log in separately for each program
 - <https://tcc.p3.enertrek.com>
 - <https://tnc.p3.enertrek.com>
- Once logged in, verify you can see res/comm programs

Contact us prior to kickoff if you are unable to login to Central/North, or unable to see Res/Comm



Create a New Project

- Click the **+ Create Project** button on the Dashboard
- Or, go into Projects and select the **+ New Project** button there
- Either way, you'll begin by selecting which program the project belongs to. Select the program and click **Submit**.

2021 TNC Residential Solar Program

Program Info

Submitted Projects	1
Customers	1
Submitted Premises	1
Submitted Measures	1

Enrollment Budget / Incentive

Approved Amount	\$10,000
Submitted Incentive	
Approved Incentive	\$
Paid/Completed Incentive	
Budget Remaining	\$9,999

+ Create Project

View Projects

View Project Calendar

Overall Program Budget

Program Budget Amount	\$10,000
Program Budget	\$



HOME

DASHBOARD

PROGRAMS

PROJECTS

PROJECT LIST

Project List

+ New Project

Batch Actions

Go

New Project

Select Program *

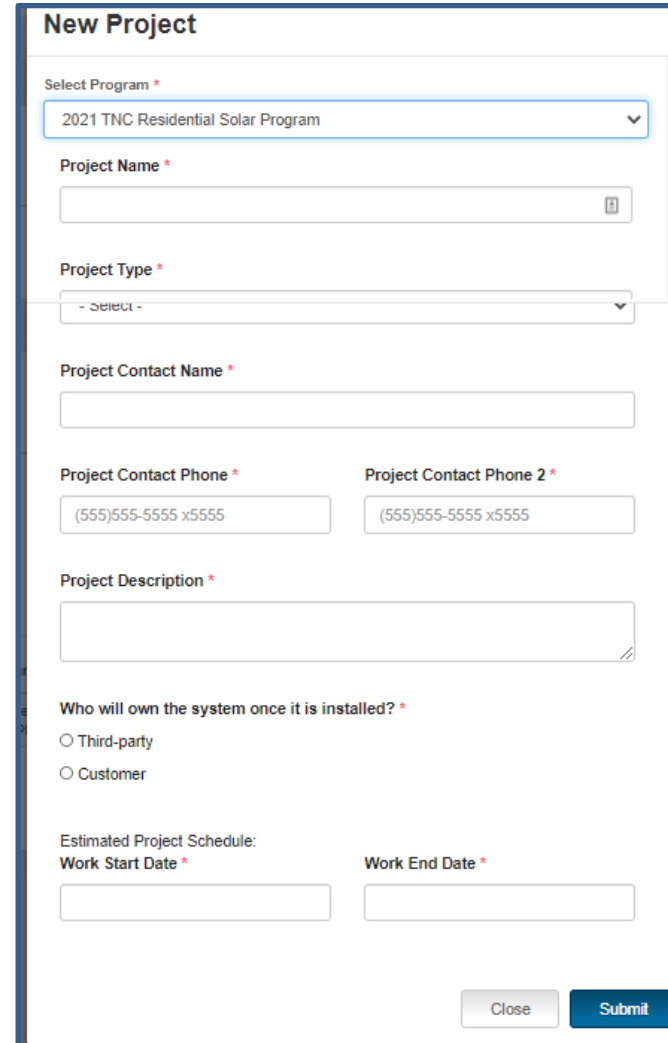
- Select -
- Select -
2021 TNC Residential Solar Program
2021 TNC Commercial Solar Program

Close

Submit

Add Project Details

- Add basic project details in the pop up modal, then click **Submit**.
 - Project Name
 - Project Type (Existing or New Construction)
 - Project Contact Info
 - Description
 - Ownership
 - Estimated Project Schedule



The screenshot shows a 'New Project' form with the following fields and options:

- Select Program ***: A dropdown menu with '2021 TNC Residential Solar Program' selected.
- Project Name ***: A text input field.
- Project Type ***: A dropdown menu with '- Select -' selected.
- Project Contact Name ***: A text input field.
- Project Contact Phone ***: A text input field with the placeholder '(555)555-5555 x5555'.
- Project Contact Phone 2 ***: A text input field with the placeholder '(555)555-5555 x5555'.
- Project Description ***: A text input field.
- Who will own the system once it is installed? ***: Two radio button options: 'Third-party' and 'Customer'.
- Estimated Project Schedule:**
 - Work Start Date ***: A text input field.
 - Work End Date ***: A text input field.

At the bottom right of the form are two buttons: 'Close' and 'Submit'.

Add Customer Details

- At this point, P3 will take you to the project overview page
- Click **Add Customer** from the Customers box, then fill out the Add Customer modal and **Submit**.

The screenshot shows the AEP Texas Project Details page for 'Abilene1'. The page includes a sidebar with 'Incentive / Savings' and 'Customers' sections. The 'Customers' section has a red box around the 'Add Customer' button. An orange arrow points from this button to the 'Add Customer' modal. The modal contains fields for Email, Phone, Phone 2, Company Name, Customer Contact (First Name, Last Name), and Mailing Address (Address 1, Address 2). At the bottom of the modal are 'Cancel' and 'Submit' buttons. Another orange arrow points from the 'Submit' button in the modal to the 'Submit' button in the main page's footer.

Project Details

Abilene1

Project ID: #6608
Program: 2021 TNC Residential So
Measure Types:

Customers 0

Add Customer

Email *

Phone *

(555)555-5555 x5555

Phone 2

(555)555-5555 x5555

Company Name *

Customer Contact: First Name *

Customer Contact: Last Name *

Mailing Address

Address 1 *

Address 2

Cancel Submit

Add Premise Details

- P3 takes you back to the project overview
- Click **Add Premise**, then fill out the Add Premise modal and **Submit**.
 - ESID or Meter # lookup validates against Central/North, Res/Comm rate code
 - Best if you know the ESID, lookup function will handle the rest
 - Annual kWh consumed
 - Existing PV system details
- Repeat for additional premises

The screenshot shows the 'Abilene1' project overview page. At the top, it displays 'Project ID: #6608' and 'Program: 2021 TNC Residential Solar Program | 2021'. Below this, there are three cards: 'Customers' (1), 'Premises' (0), and 'Market Actor' (1). The 'Premises' card is highlighted with an orange border. An orange arrow points from the 'Add Premise' button in the 'Premises' card to the 'Add Premise' modal. Another orange arrow points from the 'Submit' button in the modal to the 'Submit' button in the modal. The modal contains the following fields: 'Rate Code' (with a 'Lookup' button), 'Address 1 *', 'Address 2', 'City *', 'State *' (dropdown), 'Zip *', 'County *' (dropdown), 'Annual kWh consumed' (with radio buttons for 'estimated' and 'actual (from bills)'), 'Is there an existing PV system at this site? *' (dropdown), and 'Existing capacity (kWdc to 3 decimal places)'. At the bottom of the modal are 'Cancel' and 'Submit' buttons.

Add Measure Details

- Go back to [Show Premise](#)

- Select [Add Measure](#)

or

im | 2021

Premises 1

104049798054160
10 PULLIAM ST
SAN ANGELO, TX 76905

[Show Premise](#)

Market Actor 1

Solar Test Company XTRA
123 Main Street
Austin, TX 78733
(555) 555-5555
solar@test.com

[Show Market Actor](#)

Initiated

- Select -

[Submit](#)

Measures

[+ Add Measure](#)

Premise Information

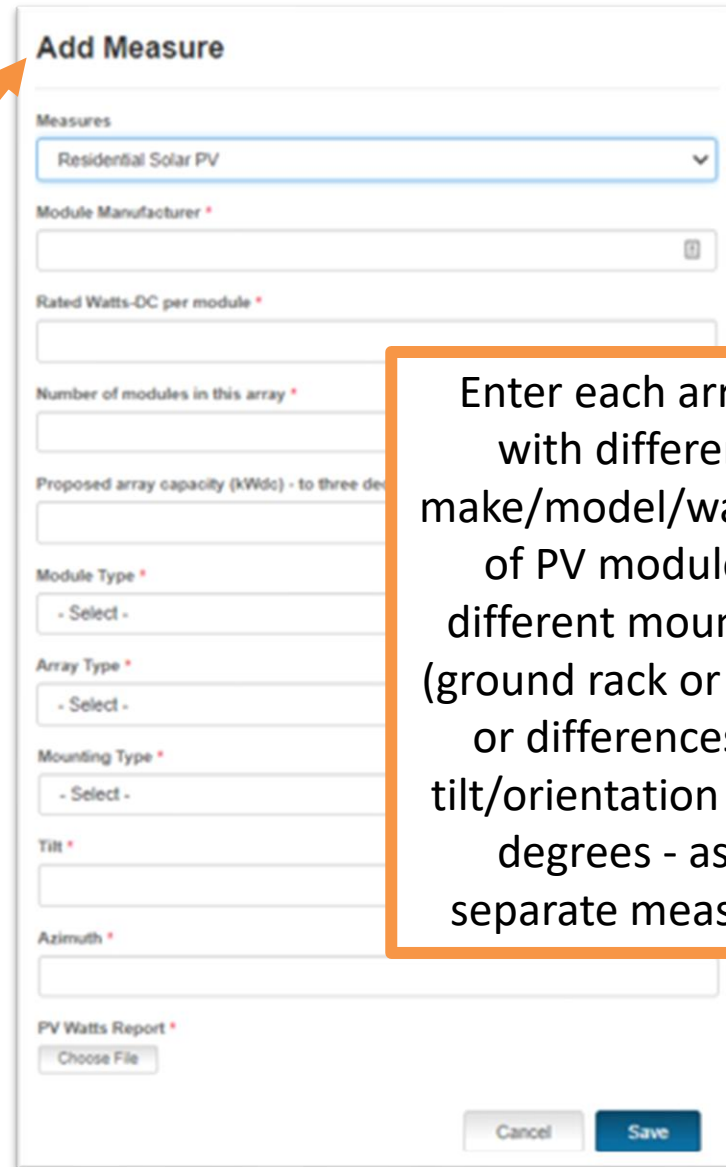
Company:	Solar Co	Savings	
Customer:	Joe Solar		
Premise No.:	10204049798054160		0.000 kW
Meter No.:	0588480448		0.00 kWh
Address:	2530 PULLIAM ST SAN ANGELO, TX 76905		
County:	TOM GREEN		
Incentive:	\$0.00		

[+ Add Measure](#)

A measure has not been added to this premise yet.
Select here to add a measure.

Add Measure Details (cont.)

- First, select the measure type (only one type in this program)
- Then fill out the Add Measure modal and **Save**
 - PVWatts upload
 - Please be sure the # of modules x rated Watts DC per module = Proposed Array Capacity
- Repeat to add additional measures



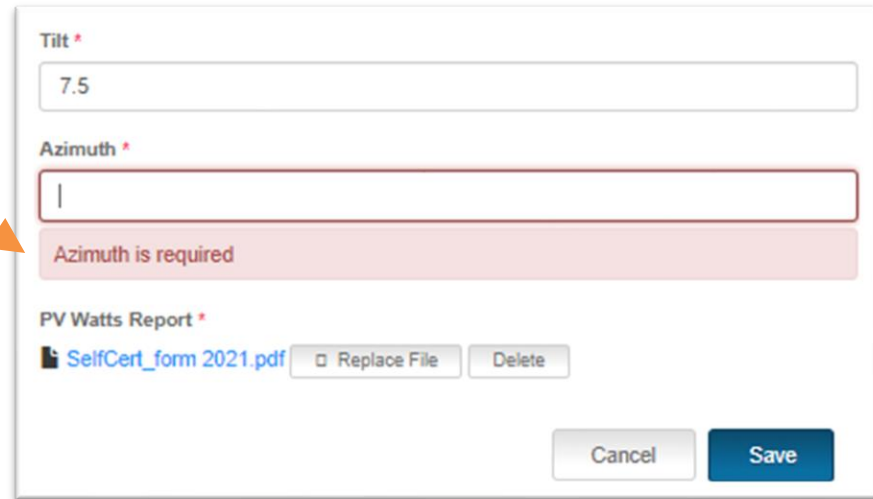
The screenshot shows a web form titled "Add Measure". It contains several input fields and dropdown menus. An orange arrow points from the text "Add Measure modal" in the list to the "Measures" dropdown menu. The form fields include:

- Measures (dropdown menu with "Residential Solar PV" selected)
- Module Manufacturer *
- Rated Watts-DC per module *
- Number of modules in this array *
- Proposed array capacity (kWdc) - to three dec
- Module Type *
- Array Type *
- Mounting Type *
- Tilt *
- Azimuth *
- PV Watts Report *
- Choose File
- Cancel
- Save

Enter each array - with different make/model/wattage of PV modules, different mounting (ground rack or roof), or differences in tilt/orientation of >5 degrees - as a separate measure.

Add Measure Details (cont.)

- Error - required field not filled out in Add Measure modal



The screenshot shows a web form titled 'Add Measure Details (cont.)'. It contains three main sections: 'Tilt *', 'Azimuth *', and 'PV Watts Report *'. The 'Tilt' field is a text input containing the value '7.5'. The 'Azimuth' field is a text input that is currently empty. Below the 'Azimuth' field, there is a red error message that reads 'Azimuth is required'. The 'PV Watts Report' section shows a file named 'SelfCert_form 2021.pdf' with buttons for 'Replace File' and 'Delete'. At the bottom right of the form are 'Cancel' and 'Save' buttons. An orange arrow points from the text 'Error - required field not filled out in Add Measure modal' to the red error message box.

Tilt *

7.5

Azimuth *

Azimuth is required

PV Watts Report *

SelfCert_form 2021.pdf Replace File Delete

Cancel Save

Upload Supporting Docs

- Go to Uploaded Files on left navbar
- Choose Add Document
- In the Add Document modal, give each a title and type
 - First three types listed must be provided for pre-approval
 - Remaining types must be provided at final approval
- Save each after upload

Add Document

Title *

Document Type *

- Select -

- Select -

Copy of recent customer electric bill

Copy of signed customer contract

Map of location for the installation site (New Construction projects only)

Copy of signed final customer invoice

List of module and inverter serial numbers

Copy of customer warranty

Photo/Copy of local jurisdiction's UCC or green tag

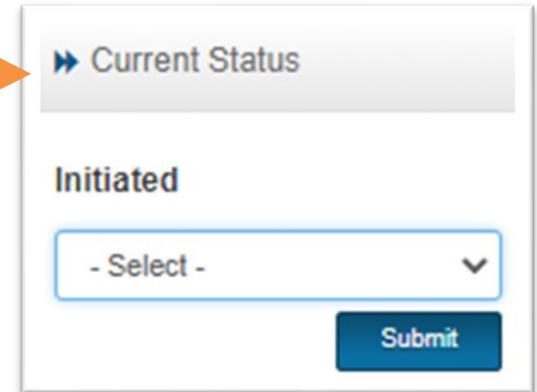
Photos of completed installation (low-res, geotagged)

Browse

Cancel Save

Submit

- Submit the project using the Current Status indicator
- After you submit the project, it will move into Pre-Approval Pending status
 - Please allow 1-2 weeks for us to review these initial submittals (we'll be faster at reviewing after these first couple of weeks)
 - We will let you know if any additional information is required before we can approve it
- Repeat these steps with additional projects
- Once approved, project will move to Work Completion Pending status
 - OK to begin construction



The screenshot shows a web interface for project status management. At the top, there is a tab labeled 'Current Status' with a right-pointing arrow. Below the tab, the word 'Initiated' is displayed. Underneath, there is a dropdown menu with the text '- Select -' and a downward arrow. To the right of the dropdown menu is a blue button with the word 'Submit' in white text.

Submit


- If you haven't provided all the required information, P3 will prevent you from submitting and will show you the error(s) at the bottom of the screen
- Correct the errors and resubmit

» Current Status

Initiated

- Select -

Submit



Residential Solar PV	R-SolarPV	1	Error Premise Rate Code does not qualify for this program.	3499.83
Residential Solar PV	R-SolarPV	1	Error This project is missing required file: Copy of recent customer electric bill	3499.83
Residential Solar PV	R-SolarPV	1	Error This project is missing required file: Copy of signed customer contract	3500.34
			Error This project is missing required file: Map of location for the installation site (New Construction projects only)	

After Construction is Complete

- Log back in, pull up project (it will still be in Work Completion Pending)
 - Go to Projects list, use search, filter and sort features, select Project Name

The screenshot shows the AEP Texas Project List interface. A callout box highlights the Search, Filter, and Sort features. The Search feature is represented by a search bar in the table header. The Filter feature is represented by a dropdown menu. The Sort feature is represented by a dropdown menu. The table displays project information including ID, Project Name, Program Name, Year, Status, Date Submitted, # of Premises, # of Measures, Savings, and Incentive.

ID	Project Name	Program Name	Year	Status	Date Submitted	# of Premises	# of Measures	Savings	Incentive
6608	Abilene1	2021 TNC Residential Solar Program	2021	Payment Pending	2/16/2021	1	1	2,450 kW 10,321.00 kWh	\$2,250.00
6609	SteveCommProject	2021 TNC Residential Solar Program	2021	Initiated		1	3	1,240 kW 4,636.87 kWh	\$1,500.00
		2021 TNC Commercial Solar Program	2021	Initiated		1	0	0.000 kW 0.00 kWh	\$0.00

Showing 1 to 3 of 3 entries

After Construction is Complete (cont.)

- Select Project, go to Premise, view Measure list
- Revise measure details if necessary, by clicking the gear icon next to the measure
 - And upload any revised docs
- Upload final project documentation
- Submit for Final Approval

Measures [+ Add Measure](#)

▼ **Premise Information** ⚙️

Company:	Solar Co	Savings	1.240 kW
Customer:	Joe Solar		4,636.87 kWh
Premise No.:	10204049798054180		
Meter No.:	0588480448		
Address:	2530 PULLIAM ST SAN ANGELO, TX 76905		
County:	TOM GREEN		
Incentive:	\$1,500.00		

Residential Solar PV \$499.83 ⚙️

Measure Information		Savings	History Edit Delete
Module Manufacturer	Solar Co		
Rated Watts DC Module	300		
Num Array Modules	30		

DC System Size ▼ 1

Copy of signed final customer invoice
List of module and inverter serial numbers
Copy of customer warranty
Photo/Copy of local jurisdiction's UCC or green tag
Photos of completed installation (low-res, geotagged)

P3 Live Demo

Tips

- Pay attention to the total incentive amount, don't worry about how the incentive is distributed among different measures/arrays/premises.
 - But if you get an odd result, go ahead and submit, but do let us know.
 - Don't worry if the result is off by a penny – we are working on that issue and a repair.
 - We will make corrections when we pre-approve the project.
- When uploading PVWatts outputs for each measure
 - P3 models energy and demand savings using TRM algorithms. These are based on PVWatts inputs, but assumes **14.00% losses** (instead of default 14.08%).
 - Do your best to match these assumptions in your PVWatts run, but don't worry if you're off by a little (5% or less). We can double check all values later. At this time, it's more important to get the projects in for review.

Tips

- Required uploads
 - Upload something, even if it's an explanation of why this upload isn't needed.
 - Example 1, local green tag in area where permits/inspections are not needed. Instead, upload a statement saying this location is in XXX county which doesn't require a permit, along with the contact information for the county office where we can verify this information.
 - Example 2, warranty provisions were already uploaded in the contract document. Upload a small file which states the warranty is included in the contract upload.
- Geotagged photos
 - All photo uploads are requested to have geotagging information with them. If you don't know what this means, or need help understanding how to geotag your photos, please contact Rob.

Tips

- Budgets and Projects
 - Your ability to submit a project for pre-approval is not limited in P3, so you should submit all the projects you want us to consider.
 - However, you are still limited to being pre-approved for up to 30% of residential program budgets, and \$56,250 of commercial program budgets.
 - We will track and enforce these limits on our end. Limits expire June 30.
- AEP Interconnection Process
 - Note that we are not asking to see any interconnection documents.
 - The expectation is that you will navigate that process with AEP on your own.
 - We will verify each project has completed the interconnection process by communicating directly with AEP before final approval and payment.

P3 Dashboard

▼ 2021 TNC Residential Solar Program

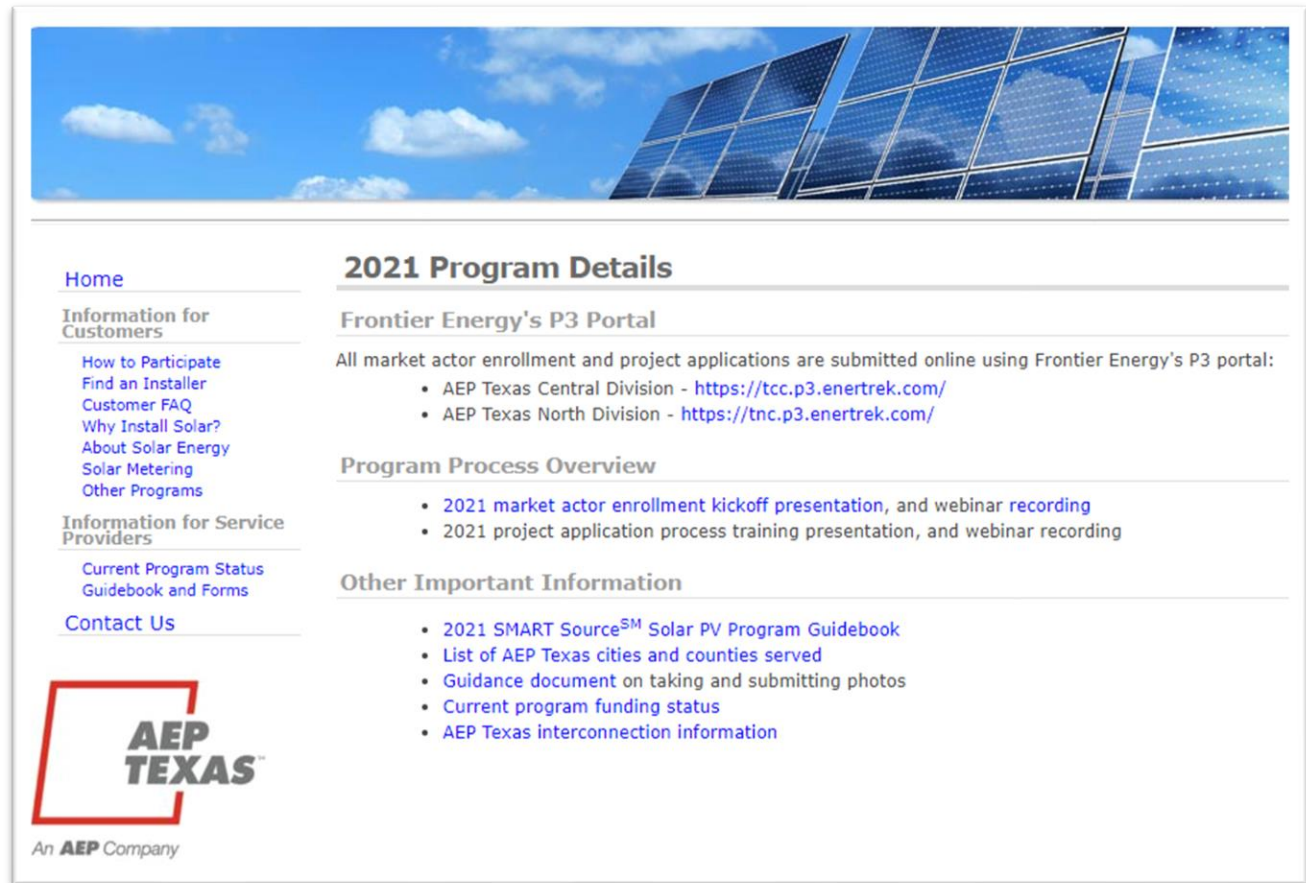
Program Info		Enrollment Budget / Incentive	
Submitted Projects	1	Approved Amount	\$45,000.00
Customers	1	Submitted Incentive	\$57,000.00
Submitted Premises	1	Approved Incentive	\$2,500.00
Submitted Measures	1	Paid/Completed Incentive	\$3,000.00
		Budget Remaining	\$39,500.00

[+ Create Project](#)

- **Approved Amount** = Max amount you can be approved for (you can submit projects over this amount)
- **Submitted Incentive** = All projects that you've Submitted, have been Pre-Approved, are in Work Completion Pending, and have been Submitted for Final Approval. You will need to use the Projects List to disaggregate this total
- **Approved Incentive** = All Projects that have been Final Approved
- **Paid/Completed Incentive** = All Projects that have been Paid

Website – txreincentives.com

- For general, public information, Program Guidebook, etc.
- Enrolled contractor listings on Find an Installer page
- Note there are useful reference documents on the Guidebook and Forms page



The screenshot shows the homepage of the txreincentives.com website. At the top is a banner image of solar panels under a blue sky with clouds. Below the banner, the page is organized into several sections. On the left is a navigation menu with links for Home, Information for Customers, Information for Service Providers, and Contact Us. The main content area features three primary sections: '2021 Program Details' which includes a link to Frontier Energy's P3 Portal and a list of links for AEP Texas Central and North Divisions; 'Program Process Overview' with links to 2021 market actor enrollment and project application presentations; and 'Other Important Information' with links to the 2021 SMART Source Solar PV Program Guidebook, a list of cities and counties served, a guidance document on taking photos, current program funding status, and AEP Texas interconnection information. At the bottom left of the page is the AEP Texas logo, which consists of a red square outline and the text 'AEP TEXAS' with 'An AEP Company' below it.

[Home](#)

Information for Customers

- [How to Participate](#)
- [Find an Installer](#)
- [Customer FAQ](#)
- [Why Install Solar?](#)
- [About Solar Energy](#)
- [Solar Metering](#)
- [Other Programs](#)

Information for Service Providers

- [Current Program Status](#)
- [Guidebook and Forms](#)

[Contact Us](#)

2021 Program Details

Frontier Energy's P3 Portal

All market actor enrollment and project applications are submitted online using Frontier Energy's P3 portal:

- AEP Texas Central Division - <https://tcc.p3.enertrek.com/>
- AEP Texas North Division - <https://tnc.p3.enertrek.com/>

Program Process Overview

- [2021 market actor enrollment kickoff presentation](#), and webinar [recording](#)
- [2021 project application process training presentation](#), and webinar [recording](#)

Other Important Information

- [2021 SMART SourceSM Solar PV Program Guidebook](#)
- [List of AEP Texas cities and counties served](#)
- [Guidance document](#) on taking and submitting photos
- [Current program funding status](#)
- [AEP Texas interconnection information](#)

AEP TEXAS
An AEP Company

Program Opening

- **Programs open to begin accepting new applications on Monday, March 1, 12 noon Central.** You will be able to create/submit new applications starting at this time.

To Do List – Prior to Opening

- Verify you can log in to one or both programs
 - <https://tcc.p3.enertrek.com>
 - <https://tnc.p3.enertrek.com>
- Verify you are enrolled in residential and commercial programs
 - **If you have issues with either of these tasks, please contact Rob**
- Check your [contractor listing on the program website](#)
 - **Contact Steve if any corrections are needed**

Help/Questions

- Always start with
Rob Lovenguth
rlovenguth@frontierenergy.com
737-443-7841
- Deeper dives:
 - P3 user questions: Tracie Cooper, tcooper@frontierenergy.com,
737-236-0246
 - Program design questions: Steve Wiese, swiese@frontierenergy.com,
737-236-0255
 - AEP questions, Jim Fowler, jjfowler@aep.com
 - AEP interconnection questions, Rosalba Epps, raepps@aep.com

Thank You!

