AMERICAN ELECTRIC POWER

2014 RESIDENTIAL AND HARD-TO-REACH STANDARD OFFER PROGRAMS

USER GUIDE FOR PROJECT SPONSORS

Updated January 2014

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INTRODUCTION

The User Guide provides Project Sponsors in the American Electric Power Residential and Hard-To-Reach Standard Offer Programs with guidelines for completing the project application, creating work schedules, entering new customers and installations and submitting Incentive Reports. Specific screen shots and directions are given for the majority of form-types that will be seen within EnerTrek®, the online database tracking system.

When working with American Electric Power Residential and Hard-To-Reach Standard Offer Program forms, a few principles should be observed:

- Unless specifically directed to use the browser's buttons, use the navigation buttons provided on the EnerTrek® forms.
- Avoid pressing a "submit" or "accept" button multiple times if your browser performance slows. This could result in multiple submissions of the same form.
- Review the entire form before proceeding to ensure that all of the information required has been provided. If your browser is inactive for more than 30 minutes, you will be automatically logged off and may need to reenter data. To avoid this, try to save your information regularly.
- If you plan to enter data in multiple online database programs, work with only one program at a time. Simultaneously opening multiple browsers may present problems, since information is temporarily stored on your computer about each session and could conflict with data from the other program.
- 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 Residential and Hard-To-Reach Standard Offer Programs is ***EnerTrek®,*** developed specifically for the various Residential and Hard-To-Reach Standard Offer Programs being implemented by utilities. Henceforth, the online data tracking system will be referred to as EnerTrek.

REGISTRATION

Step 1: American Electric Power's Residential and Hard-To-Reach Program Home Page

To access EnerTrek®, go to American Electric Power's Standard Offer Program Home Page for the appropriate program:

TCC:

- Residential Program: http://www.aepressop.com/TexasCentral/index.html
- Hard-To-Reach Program: http://www.aephtrsop.com/TexasCentral/index.html

TNC:

- Residential Program: http://www.aepressop.com/TexasNorth/index.html
- Hard-To-Reach Program: http://www.aephtrsop.com/TexasNorth/index.html

SWEPCO:

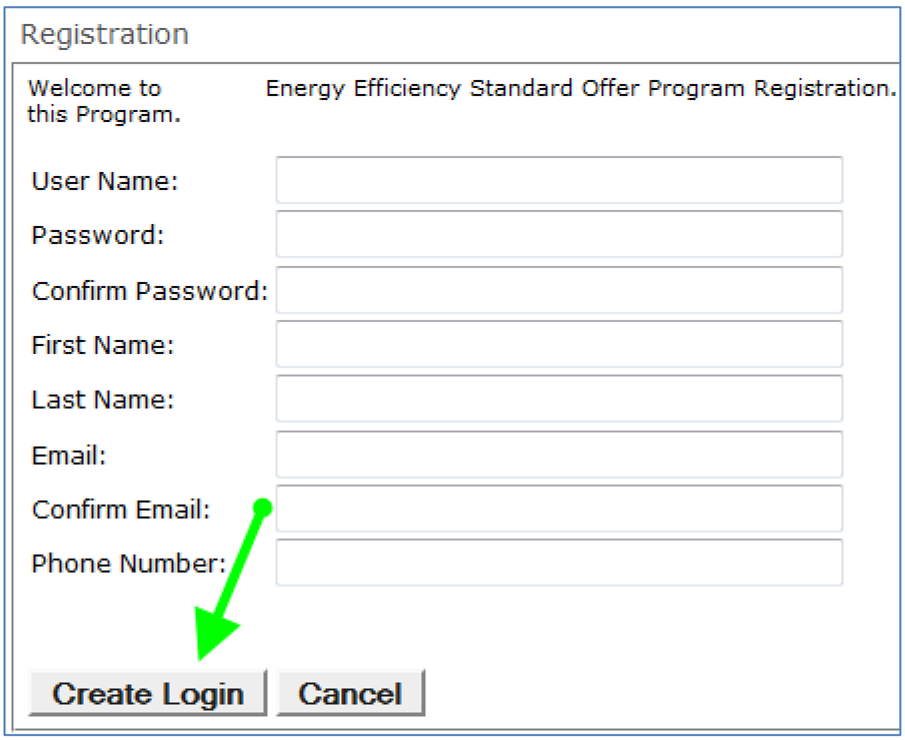
- Residential Program: http://www.swepcogridsmart.com/texas/homes-standard-offer-program.html
- Hard-To-Reach Program: http://www.swepcogridsmart.com/texas/homes-hard-to-reach-rebate-program.html

➢ Select the "Register/Login" link or "Project Sponsor Login" link from the menu on the left side of the appropriate page to access the EnerTrek login page.

➢ The Login Page will open in a new window. First time users will need to select "Click here to register" from the menu on the right.

Step 2: Registration Form

- Complete all fields in the registration form. The user name and password are case sensitive. After completing the form, select ***Create Login***.
- If this portion of your registration was successful, you should see a message saying your login was successfully created and that an email has been sent to the address you specified. You will need the activation code that is in that email to complete your registration.


Registration

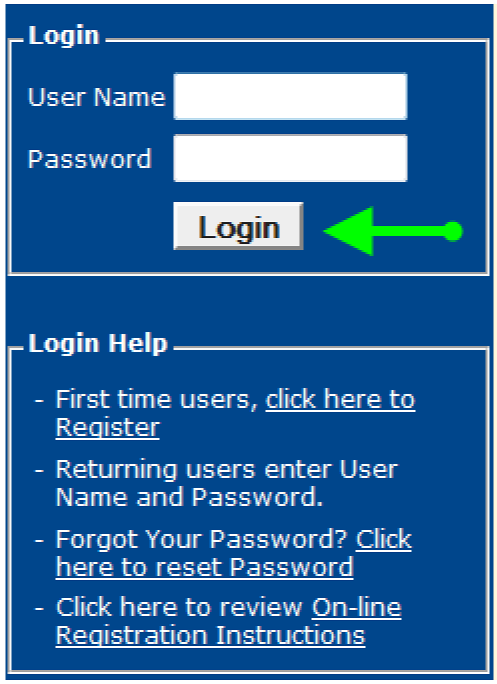
Welcome to this Program. Energy Efficiency Standard Offer Program Registration.

User Name:
Password:
Confirm Password:
First Name:
Last Name:
Email:
Confirm Email:
Phone Number:

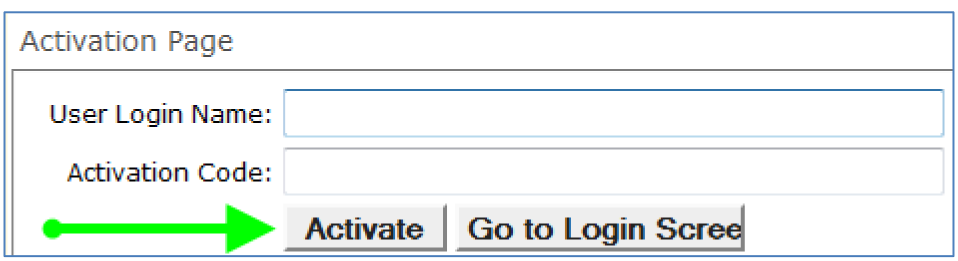
Create Login | Cancel

Step 3: Activation Code

- Upon receipt of the email with your activation code, return to the login screen and enter your user name and password in the appropriate fields and select the ***Login*** button.



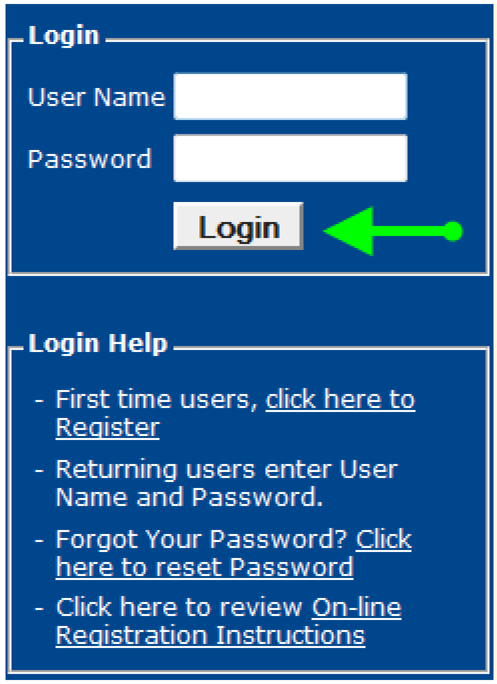
- Enter your user name and activation code and select the ***Activate*** button.



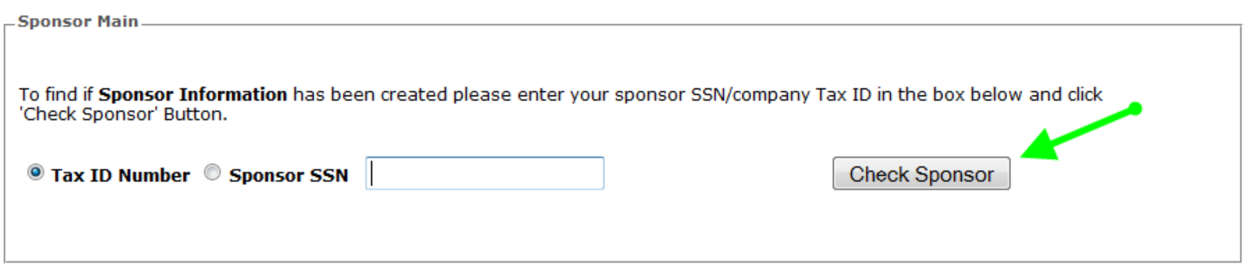
- If this portion of your registration was successful, you should see a message indicating your user account is activated. You may select the ***Go to Login Screen*** button to log in.

Step 4: Project Sponsor Tax ID/SSN

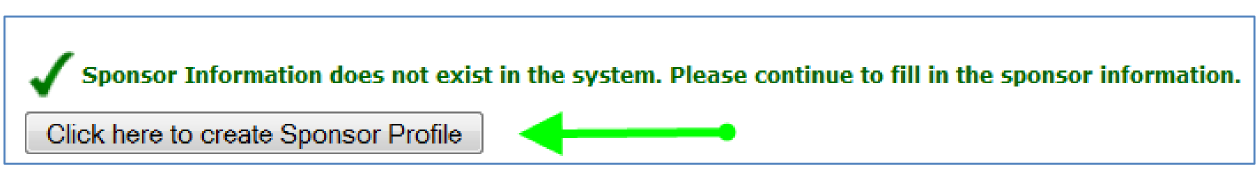
- Enter your user name and password, again, and select the ***Login*** button.



- Enter your tax ID or Sponsor Social Security Number in the appropriate field and select the ***Check Sponsor*** button.

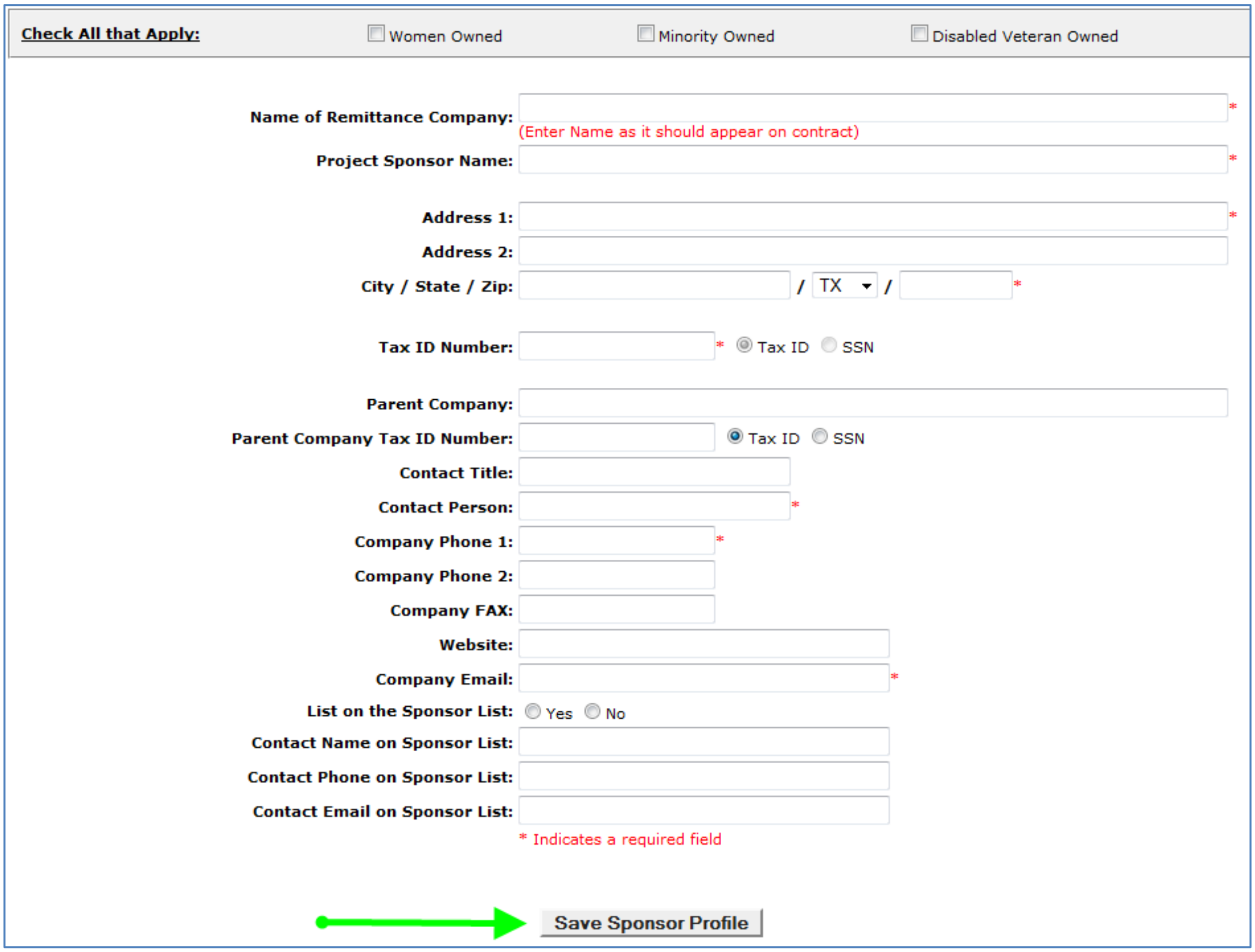


- If this portion of your registration is successful, you should see the following message. Select the ***Click here to create Sponsor Profile*** button.



SPONSOR PROFILE

- Fill in all applicable fields in the Sponsor Profile and select the ***Save Sponsor Profile*** button.



(Select ***Home*** link at top left corner to continue next steps for Application.)

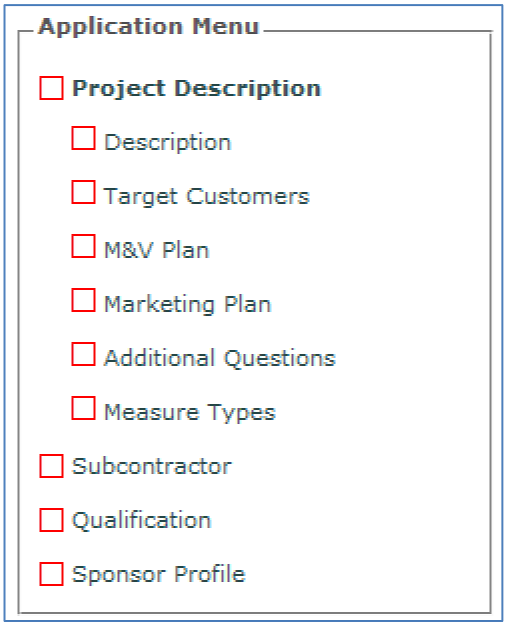
APPLICATION

Step 5: Fill in Application Form

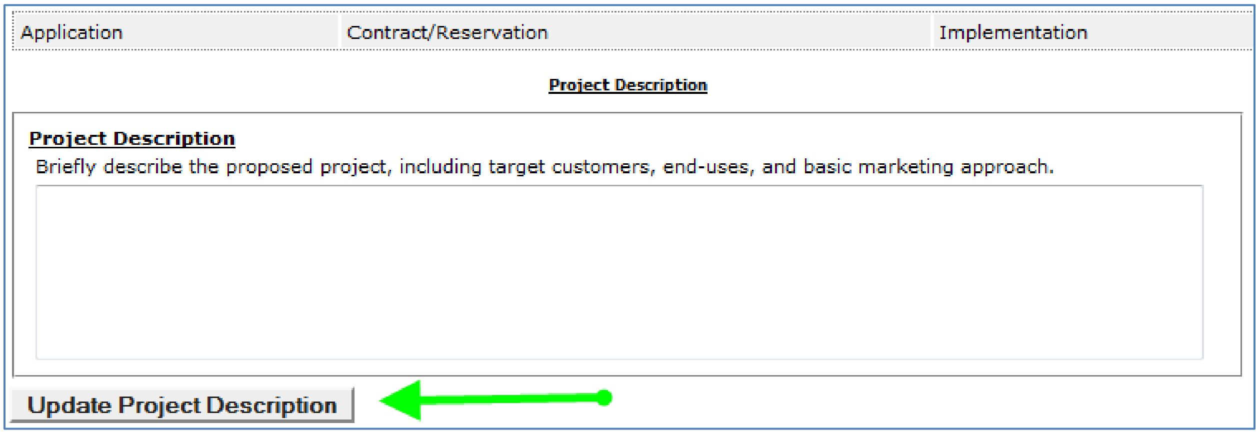
- Select the ***Create Application*** link next to the program for which you would like to create an application.

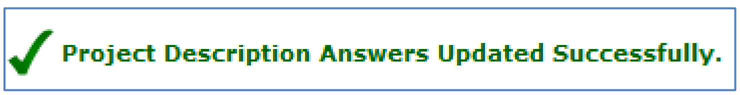
2014 Programs	Sponsor Application
2014 AEP Residential - Large Project	Create Application
2014 AEP Residential - Small Projects	Create Application
2014 AEP Hard-to-Reach - Small Projects	Create Application

- Look for the Application Menu on the right side of the screen.
- Select each section's link to access the section's form.

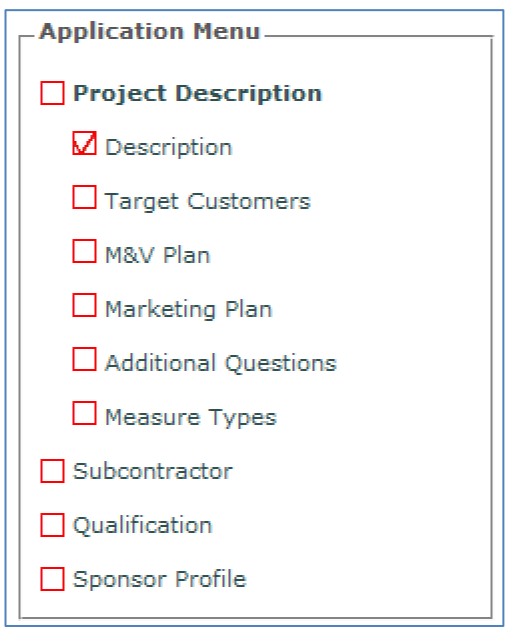


➢ Complete each section and select the ***Update*** button at the bottom of each section's page to save your entries.

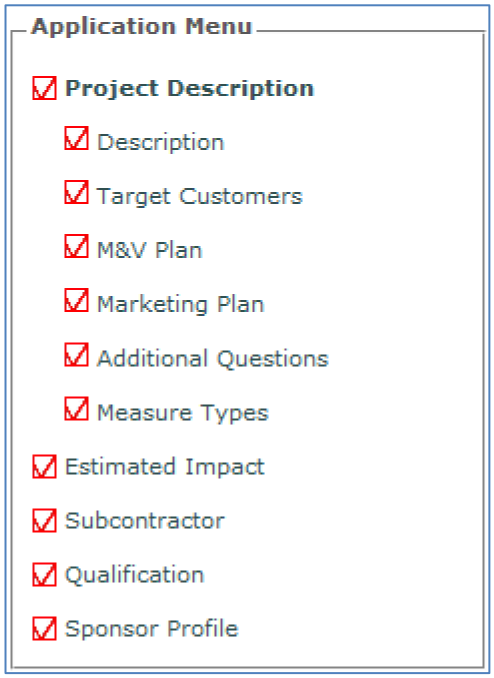




➢ After each section is updated, the checkbox next to that section in the Application Menu should be checked.

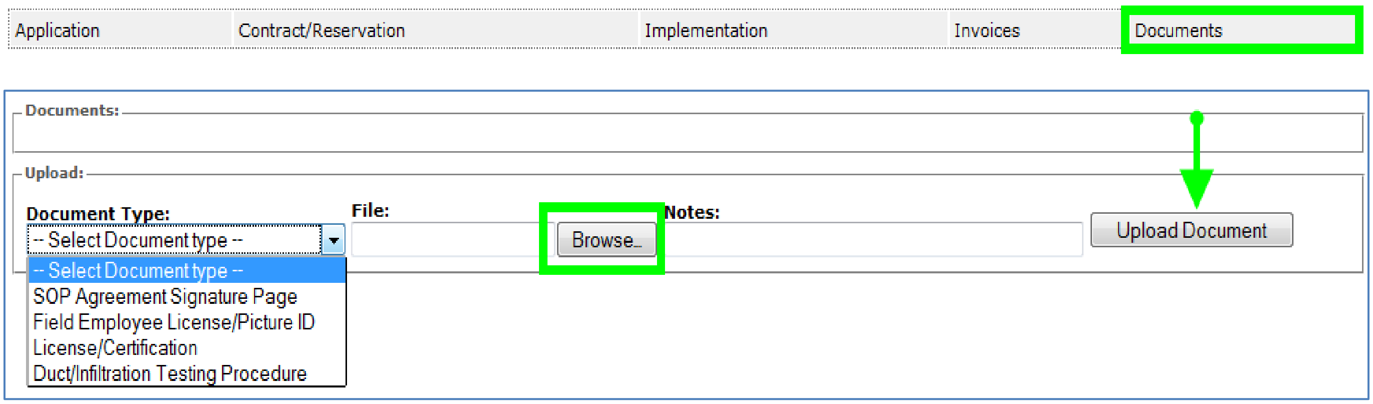


- When all sections of the Application Menu indicate complete with a check mark, the application is ready to be submitted on the designated submit date and time.



Step 6: Upload Documents

- To upload documents, select the ***Documents*** tab from the top menu.
- Select the document type you are going to upload from the drop-down menu.
- Select the ***Browse*** button to find the file in your computer to upload.
- If you choose, you can add notes in the ***Notes*** field.
- Select the ***Upload*** Document button.



Step 7: Submit Application

- On the application submission date, log in and select the ***Ready To Submit*** button next to the appropriate program.

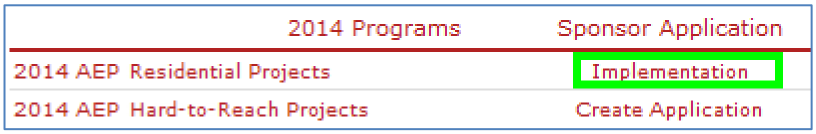
2014 Programs	Sponsor Application	Status	Program Submission Date	
2014 AEP Residential Projects	Edit Application	Initiated @11/14/2013	11/5/2013 10:00:00 AM	Ready to Submit
2014 AEP Hard-to-Reach Projects	Create Application	Not Initiated Yet	11/19/2013 10:00:00 AM	

- Refresh your screen (F5) when the clock passes the designated submit time.
- A 4-digit number will appear after refreshing after the designated submit time.
- Enter the 4-digit number in the box below in the order it appears on the screen.
- With the number entered correctly, click on the ***Submit Application*** button.

Your application has been submitted

IMPLEMENTATION

➢ Select the ***Implementation*** link next to the appropriate program.

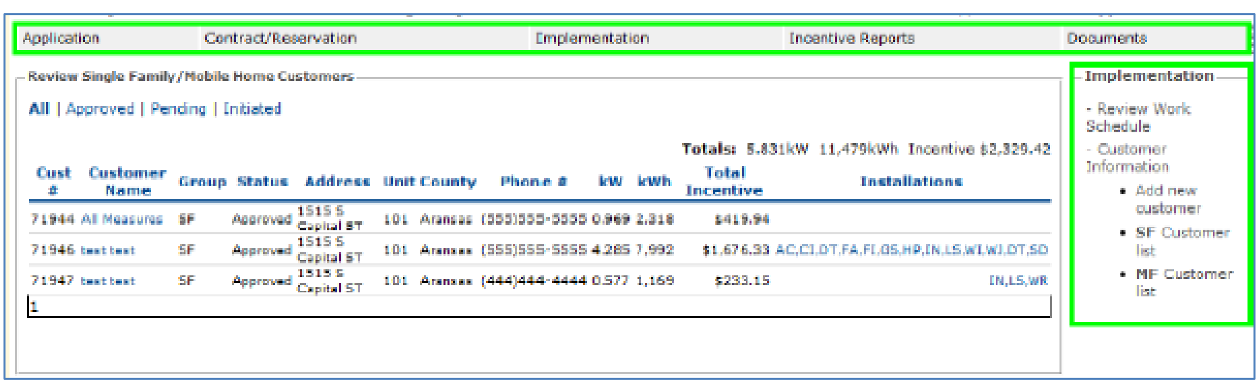


➢ Appearing horizontally along the grey bar near the top of the screen are four tabs:

- <u>Application</u> – provides a summary of your submitted application.
- <u>Contract/Reservation</u> – provides a summary of your reservation history and indicates the remaining program funds available.
- <u>Implementation</u> - allows you to enter and review customer and installation data.
- <u>Incentive Reports</u> – allows you to submit and review an Incentive Report.
- <u>Documents</u> – allows you to upload sponsor documents

➢ Appearing vertically down the right side of the screen is the ***Implementation menu***, which includes several links:

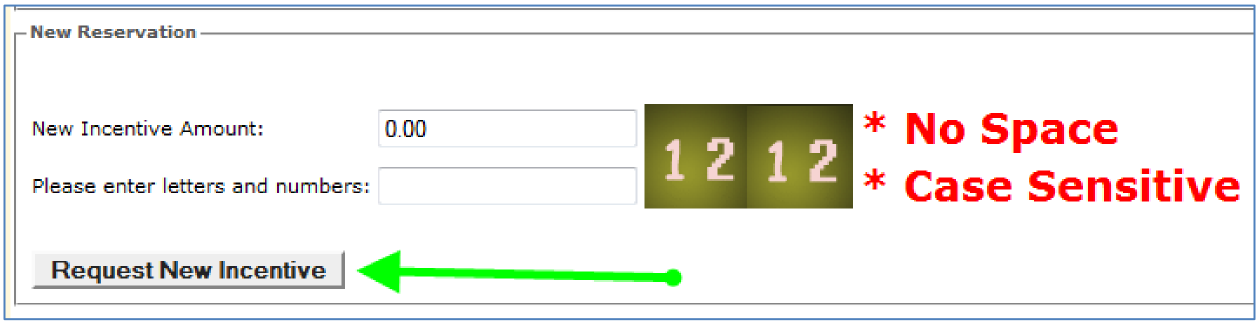
- <u>Review Work Schedule</u> – View, Add and Edit work schedule details.
- <u>Add New Customer</u> – add new single-family, mobile home or multi-family customer information.
- <u>SF Customer List</u> – List of single family and/or mobile-home customers.
- <u>MF Customer List</u> – List of multi-family templates.



Step 8: Make a Reservation for Single Family Customers

(RESERVATIONS ARE REQUIRED FOR SOME PROGRAMS, BUT NOT ALL)

- To reserve funds for Multi-family customers, see step **10.3.**
- Select the ***Contract/Reservation*** tab at the top of the page.
- Fill in the incentive amount you are requesting and the numbers shown in the appropriate fields and select the ***Request New Incentive*** button.



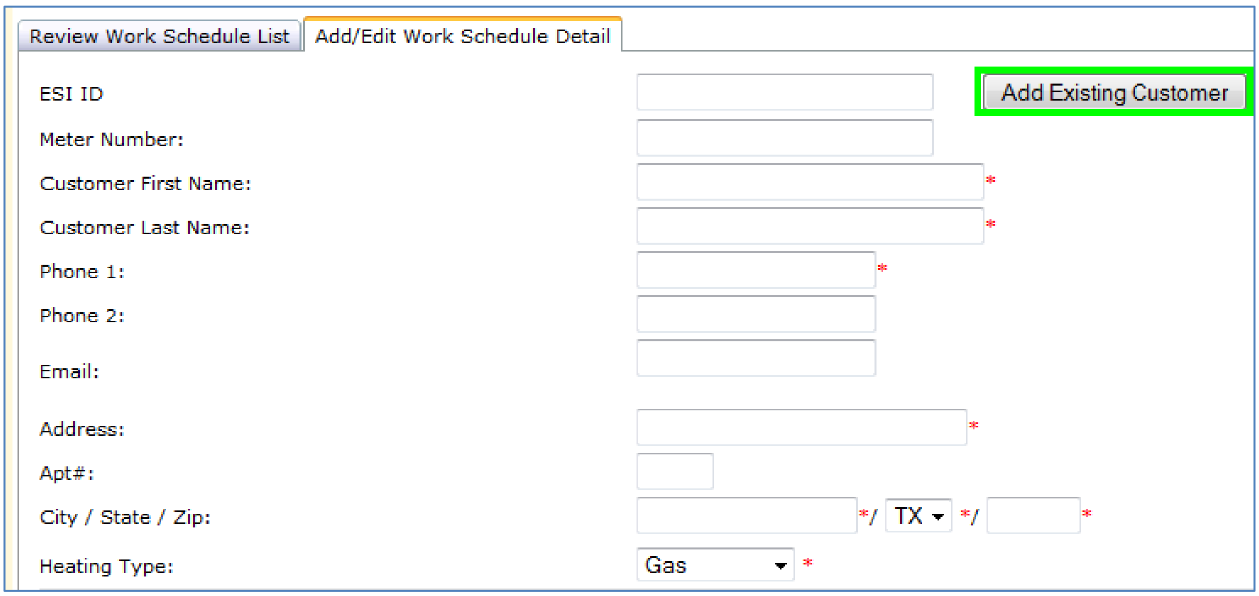
Step 9: Set up Work Schedule

The Work Schedule allows the Program Administrator to know in advance when work will be performed at a customer site so a pre-inspection can be scheduled and conducted.

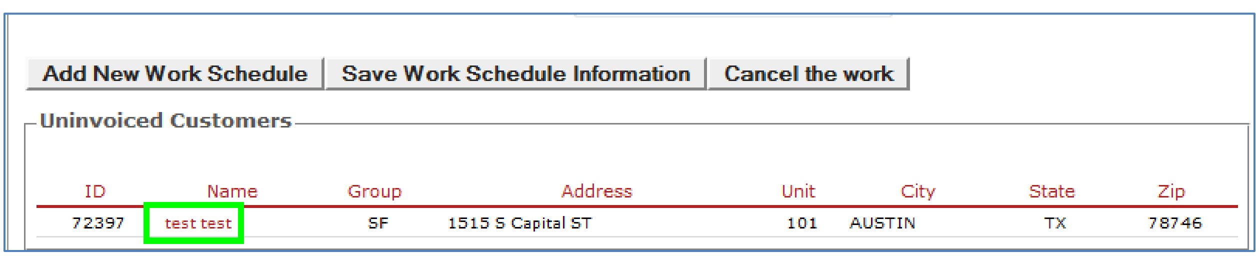
- To enter Work Schedule information, click ***Review Work Schedule*** from the Implementation menu.

- Select the ***Add/Edit Work Schedule Detail*** tab.

- If you have already entered the customer's information into system, select ***Add Existing Customer*** button. (not available for SWEPCO)



- Scroll to bottom of page and select name link of appropriate customer to populate top portion of work schedule form with customer's information. Fill in contact information, as well.



- If you have not already entered the customer's information in the system, fill out all fields in the form.

- When the form is complete, select the ***Save Work Schedule Information*** button at the bottom of the page.

- Fill out a work schedule for each customer site.

Select the ***Review Work Schedule List*** tab to review all work schedules that have been entered.

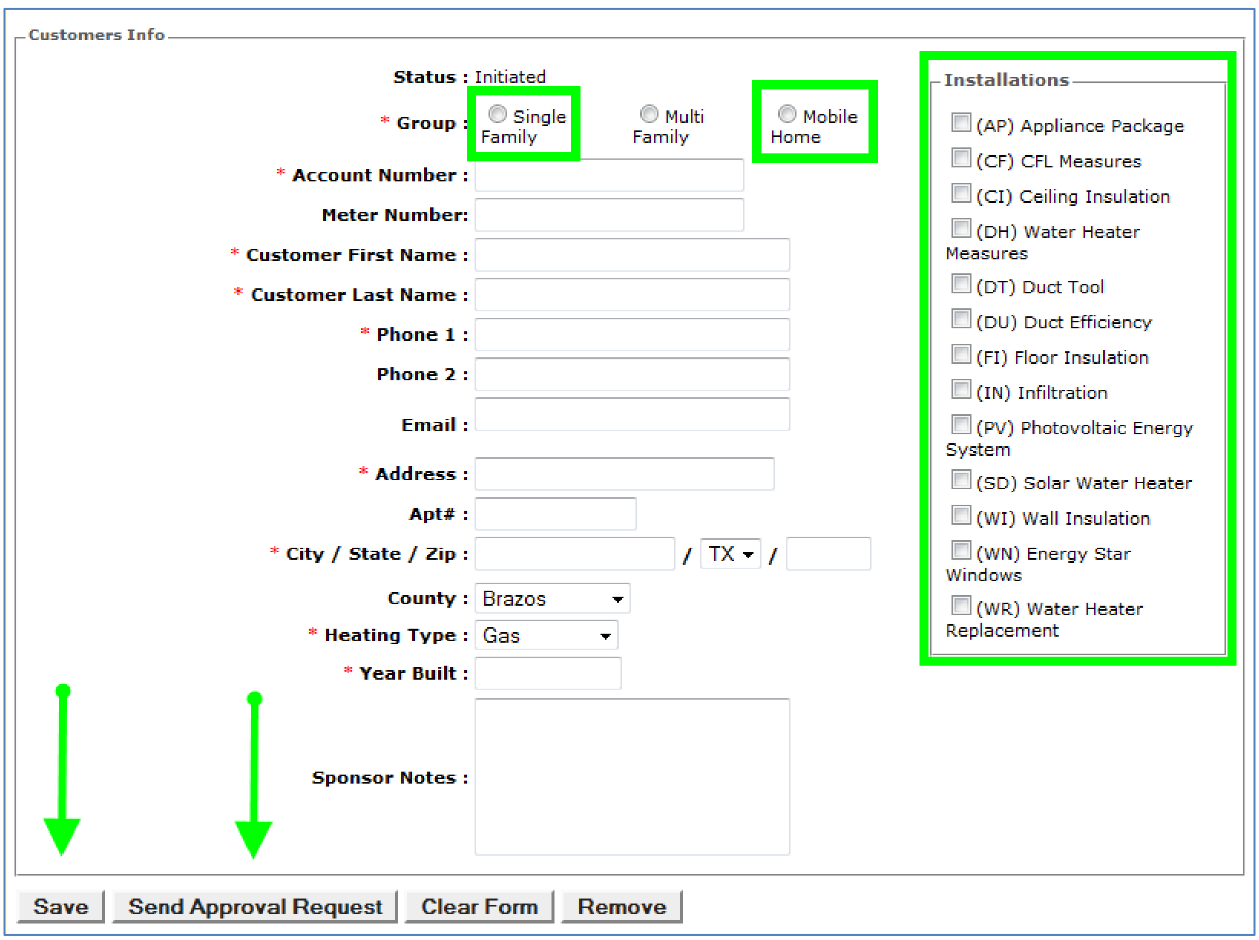
Step 10.1: Add New Single-Family/Mobile Home Customer

- Select the ***Add New Customer*** link from the Implementation menu.

- Select either ***Single Family*** or ***Mobile Home*** radio buttons at the top of the form, select the installations types by checking the corresponding boxes on the right, fill in the appropriate information for the rest of the form and select the ***Save*** button.

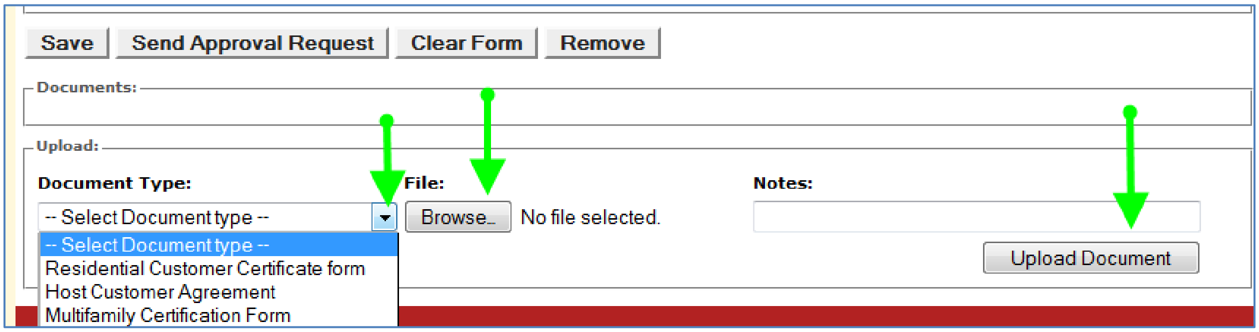
- ***Note:*** Look-up function – The system will populate the address once you enter a valid ESI ID number or meter number. Add the number in the appropriate field and select the ***Lookup*** button.

- After you have reviewed all of the information for accuracy, select the ***Send Approval Request*** button. The database will check to see if the customer you are trying to add is already in the historical database. If it is not, then the customer is automatically approved. If it is in the historical database, the customer will be set to "pending" status until approved by the Program Manager. Once approved, you will be able to add installations to the customer by accessing the customer in your ***SF Customer List***.

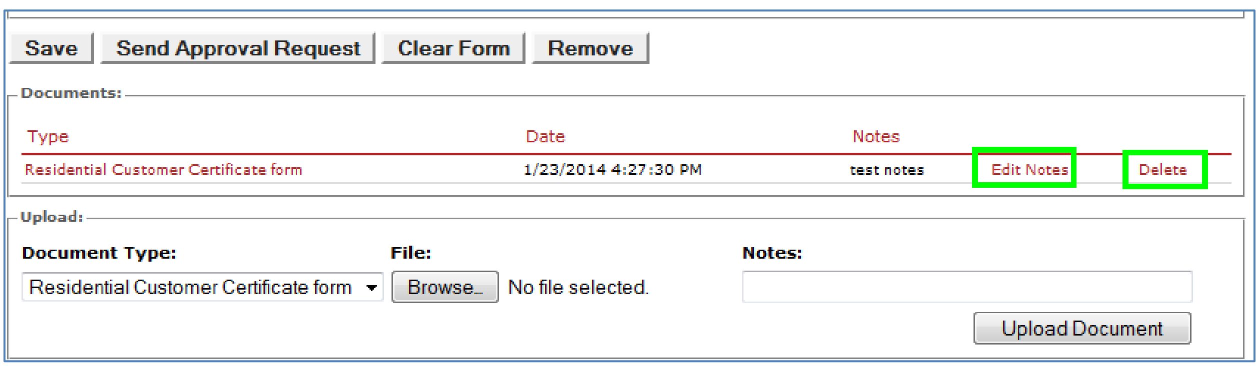


Step 10.2 Upload Single-Family/Mobile Home Customer Documents

- Once you have submitted your customer for approval, upload documents, if applicable.
- Scroll down the customer input form and select the ***Document Type*** drop-down menu.
- Select the ***Browse*** button to find the document you would like to upload.
- Select the ***Upload Document*** button.



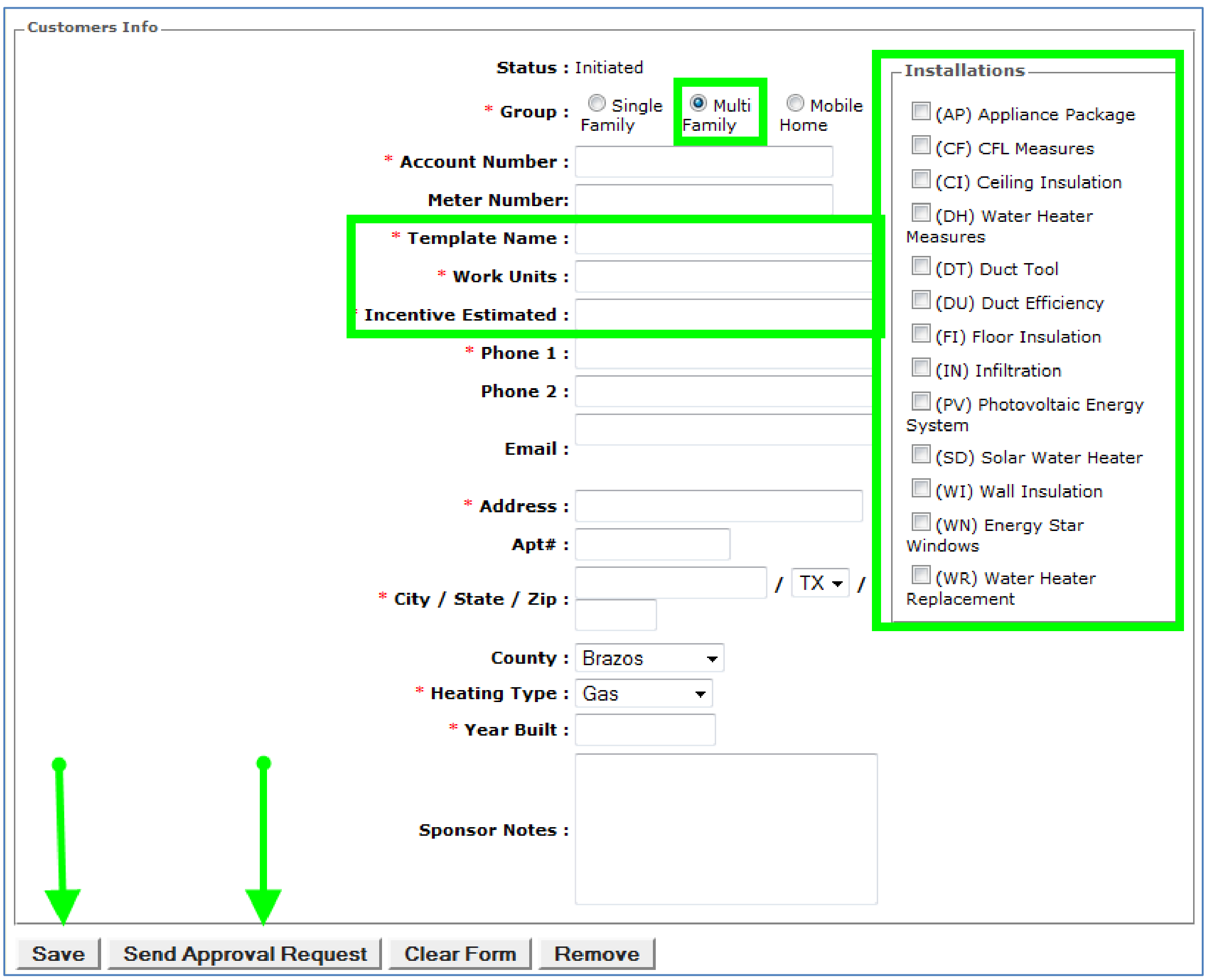
- After the document is uploaded, you should be able to open/download the document by selecting the document link.
- You can also edit the documents notes by selecting the ***Edit Notes*** link next to the appropriate document
- You can also delete a document by selecting the ***Delete*** link next to the appropriate document.



Step 10.3: Add Multi-Family Template

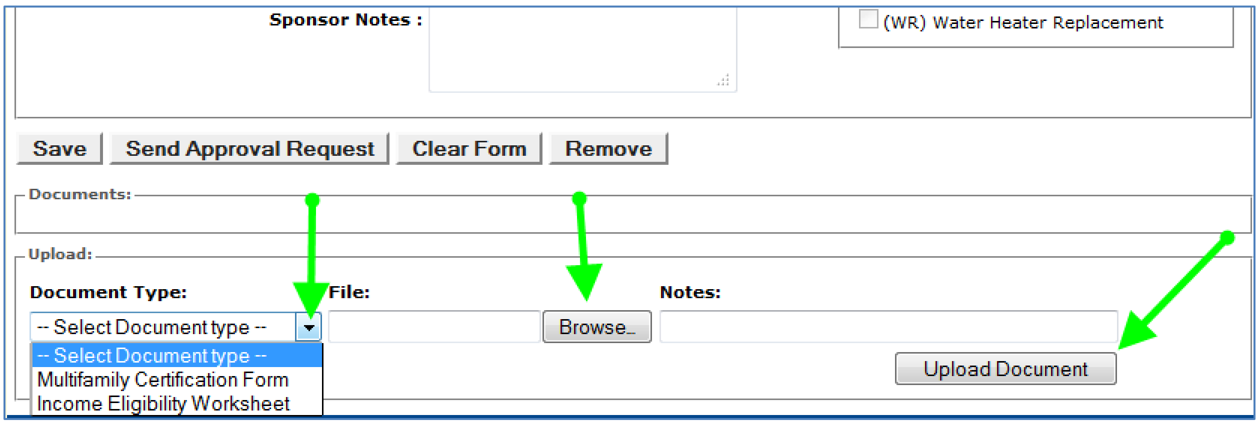
First, you will need to create a multi-family template. Then you can add customers and installations using that template.

- Select the ***Add New Customer*** link from the Implementation menu.
- Select the ***Multi-Family*** radio button at the top of the form; you should see three new fields were added to the Multi-family template.
- Select the installations types by checking the corresponding boxes on the right, fill in the appropriate information for the rest of the form and select the ***Save*** button.
- After you have reviewed all of the information for accuracy, select the ***Send Approval Request*** button. Each multi-family customer template will be in pending status until approved by the Program Manager. Once it has been approved, it will appear under your ***MF Customer List***.

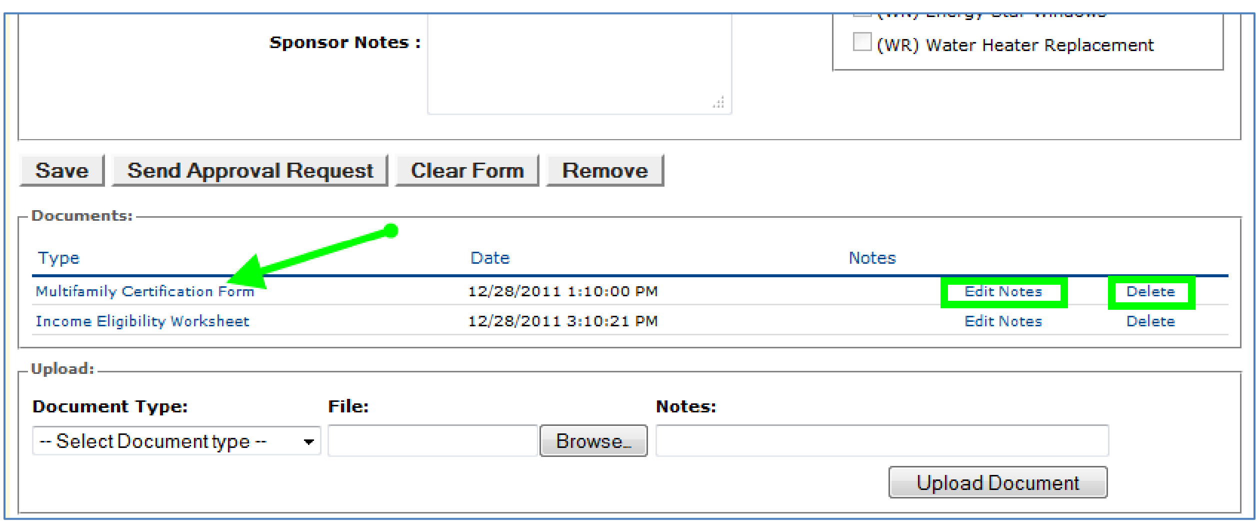


Step 10.4 Upload Multi-Family Template Documents

- Once you have submitted your template for approval, upload template documents, if applicable.
- Scroll down the customer input form and select the ***Document Type*** drop-down menu.
- Select the ***Browse*** button to find the document you would like to upload.
- Select the ***Upload Document*** button.

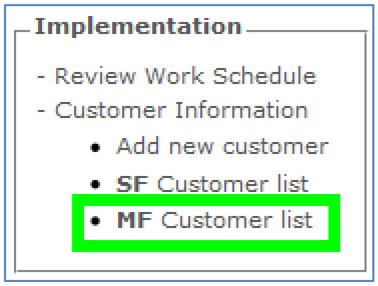


- After the document is uploaded, you should be able to open/download the document by selecting the document link.
- You can also edit the documents notes by selecting the ***Edit Notes*** link next to the appropriate document
- You can also delete a document by selecting the ***Delete*** link next to the appropriate document.

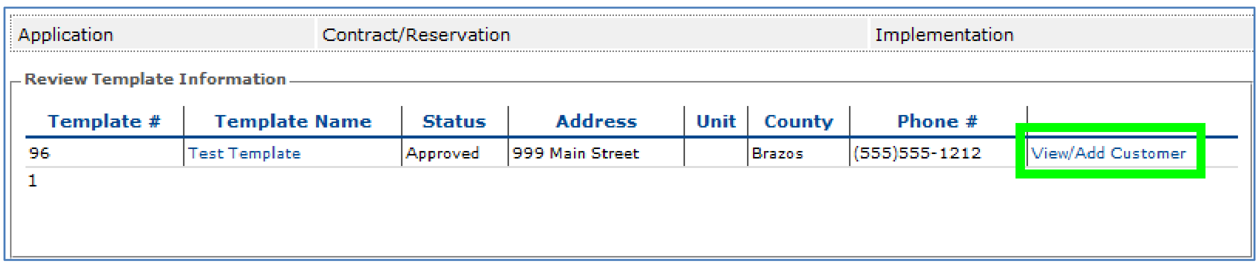


Step 10.5: Add Multi-Family Customers

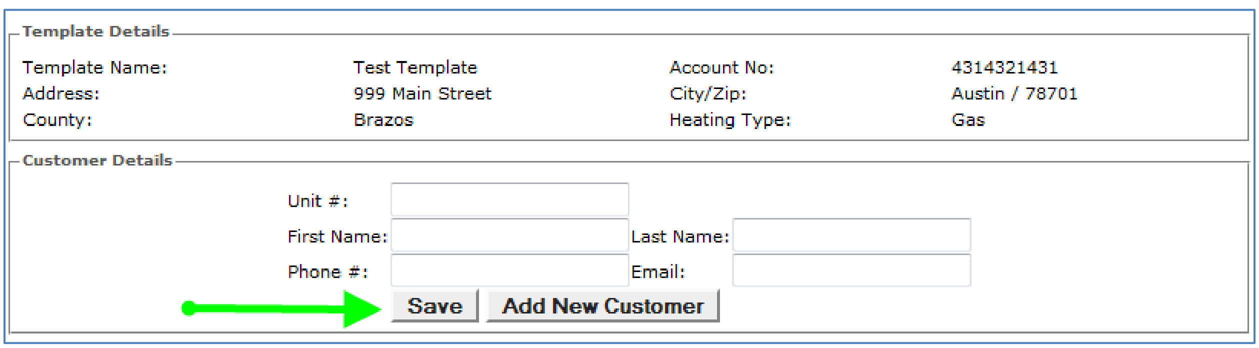
- Select ***MF Customer List*** from the Implementation menu to see your multi-family templates.



- Select the ***View/Add Customer*** link on the right side of the appropriate customer



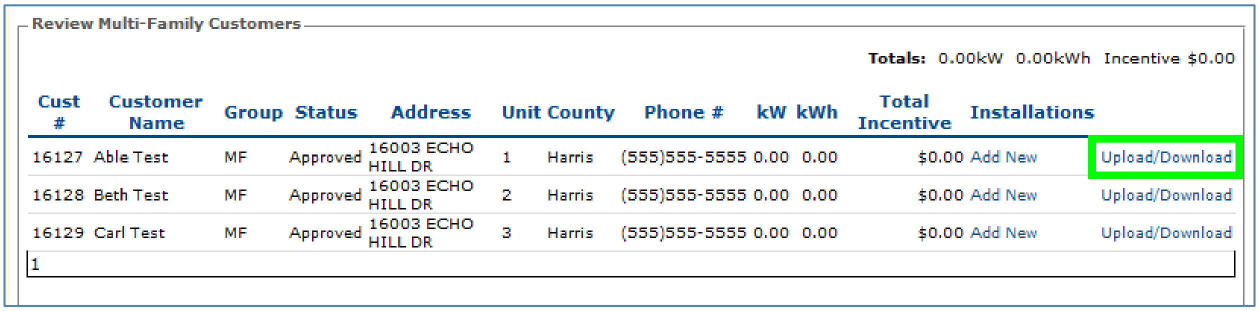
- Fill in the fields under the Customer Details box and select the ***Save*** button.



- ***Note:*** Be sure to review the customer information for accuracy prior to saving. Once you save a multi-family customer, you will not be able to edit the customer information. You may, however, contact the Program Administrator to make any necessary changes to multi-family customer information.

Step 10.5 Upload Multi-Family Customer Documents

- Select the ***Upload/Download*** link next to the appropriate customer.

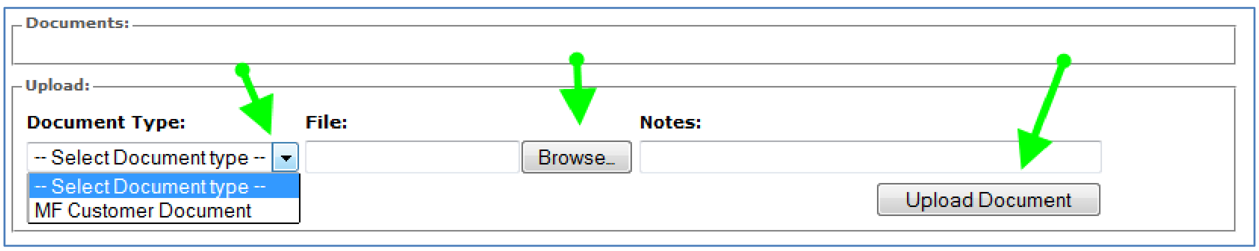

Review Multi-Family Customers

Totals: 0.00kW 0.00kWh Incentive $0.00

Cust #	Customer Name	Group	Status	Address	Unit	County	Phone #	kW	kWh	Total Incentive	Installations	
16127	Able Test	MF	Approved	16003 ECHO HILL DR	1	Harris	(555)555-5555	0.00	0.00	$0.00	Add New	Upload/Download
16128	Beth Test	MF	Approved	16003 ECHO HILL DR	2	Harris	(555)555-5555	0.00	0.00	$0.00	Add New	Upload/Download
16129	Carl Test	MF	Approved	16003 ECHO HILL DR	3	Harris	(555)555-5555	0.00	0.00	$0.00	Add New	Upload/Download

1

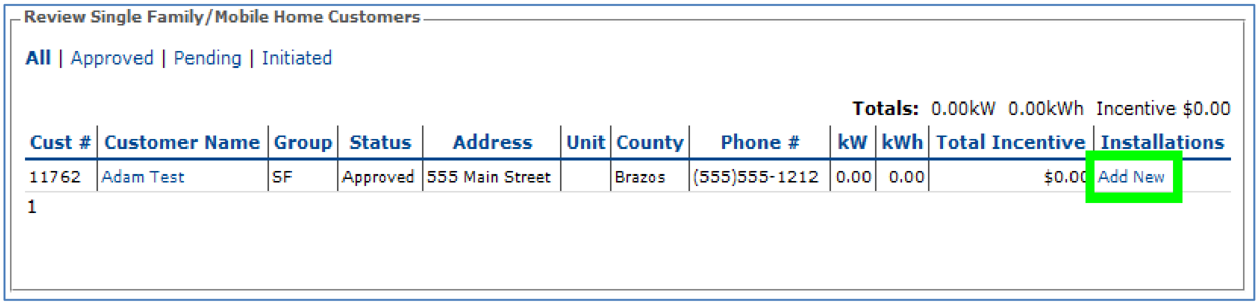
- Scroll down the customer input form and select the ***Document Type*** drop-down menu, if applicable.
- Select the ***Browse*** button to find the document you would like to upload.
- Select the ***Upload Document*** button.



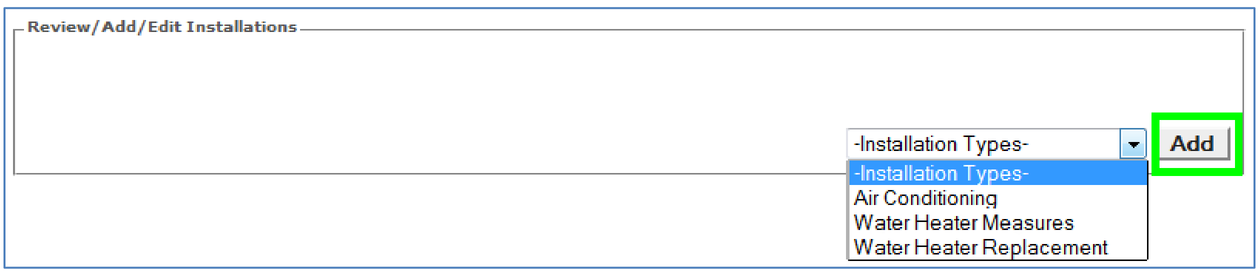
- After the document is uploaded, you should be able to open/download the document by selecting the document link.
- You can also edit the documents notes by selecting the ***Edit Notes*** link next to the appropriate document
- You can also delete a document by selecting the ***Delete*** link next to the appropriate document.

Step 11.1: Add/View/Edit Single-Family Installations

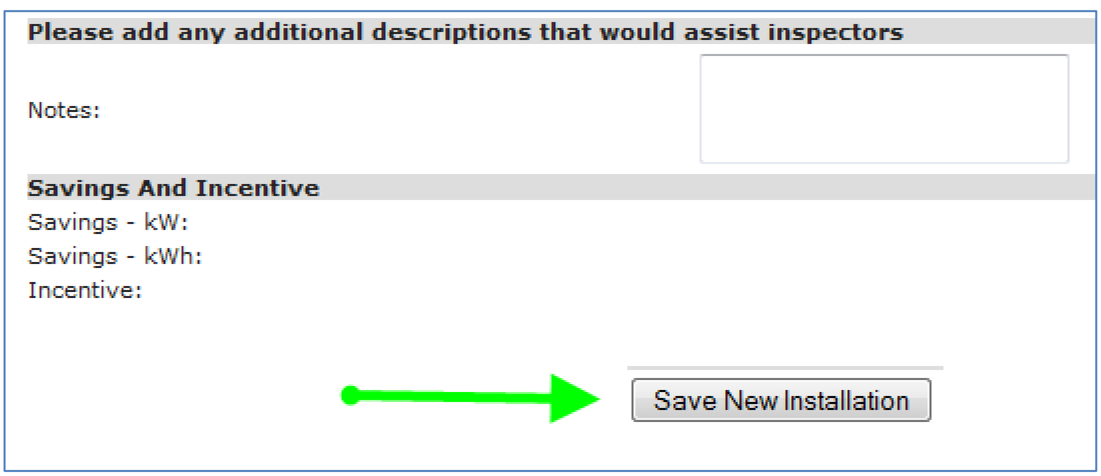
- Select the ***SF Customer List*** link from the Implementation Menu.
- Select the ***Add New*** link on the right side next to the appropriate customer.



- Select the appropriate measure from the drop-down menu and select the ***Add*** button.

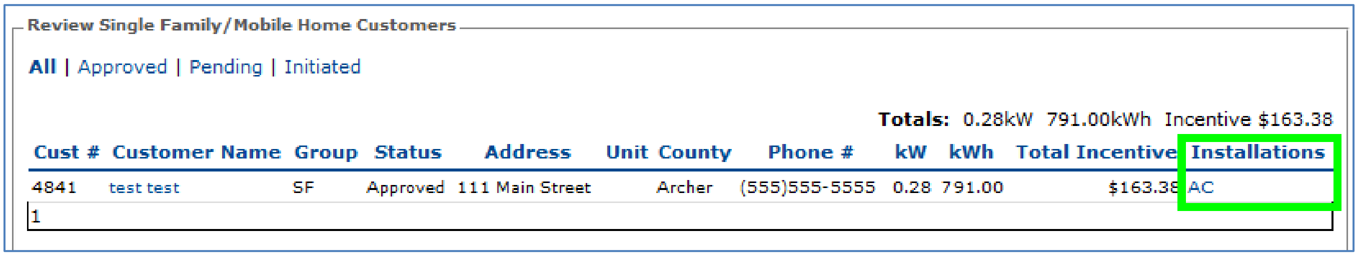


- Fill in the installation form that unfolds and select the ***Save New Installation*** button at the bottom of the form.



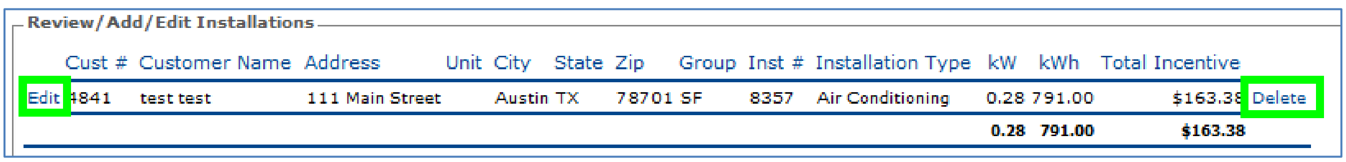
- To view single-family customers and installations, select the ***SF Customer List*** link from the Implementation menu. You will see a list of customers along with installation codes for each customer's installations under the ***Installations*** column.

- To view and/or edit an installation, select any of the installation code links next to the appropriate customer.



- To edit an installation, select the ***Edit*** link on the left side of the appropriate installation.

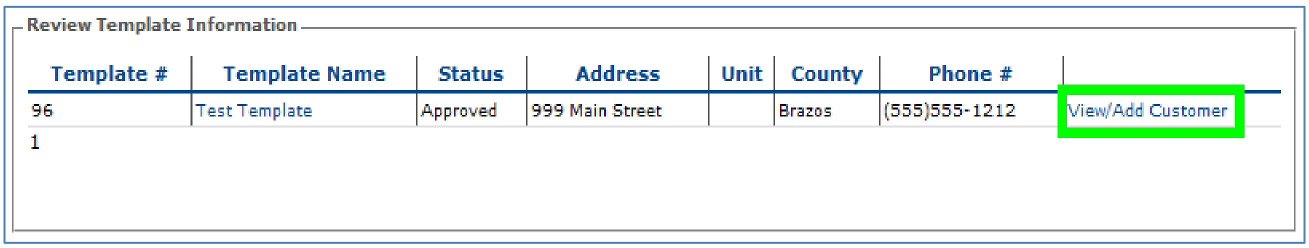
- To delete an installation, select the ***Delete*** link on the right side of the appropriate installation



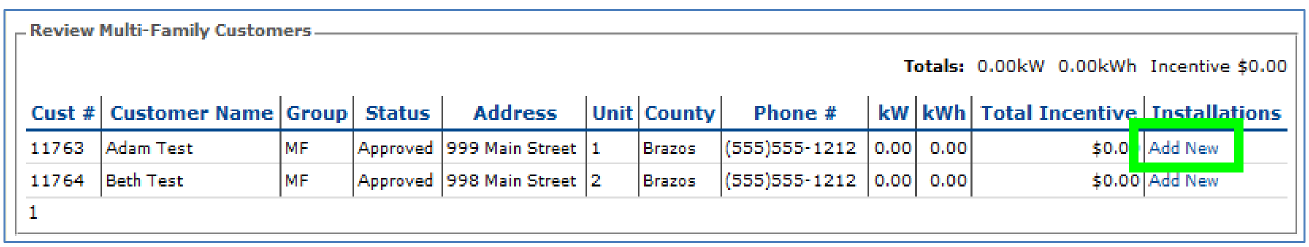
Step 11.2: Add/View/Edit Multi-Family Installations

- Select the ***MF Customer List*** link in the Implementation Menu.

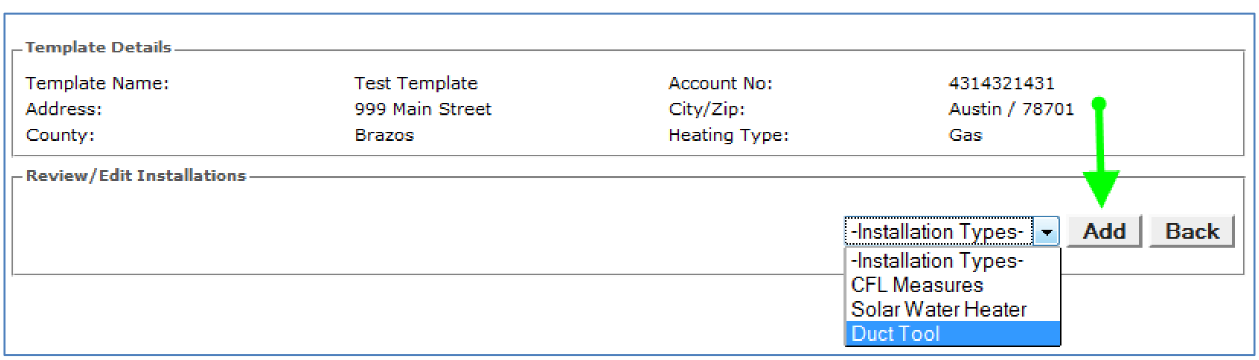
- Select the ***View/Add Customer*** link next to the appropriate MF template.



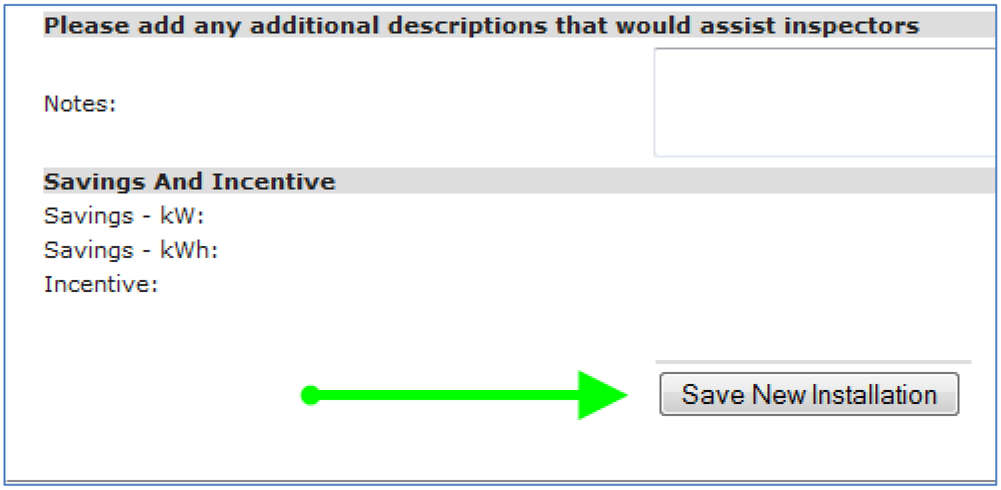
- Select the ***Add New*** link next to the appropriate MF customer.



- Select the appropriate measure from the drop-down menu and select the ***Add*** button.

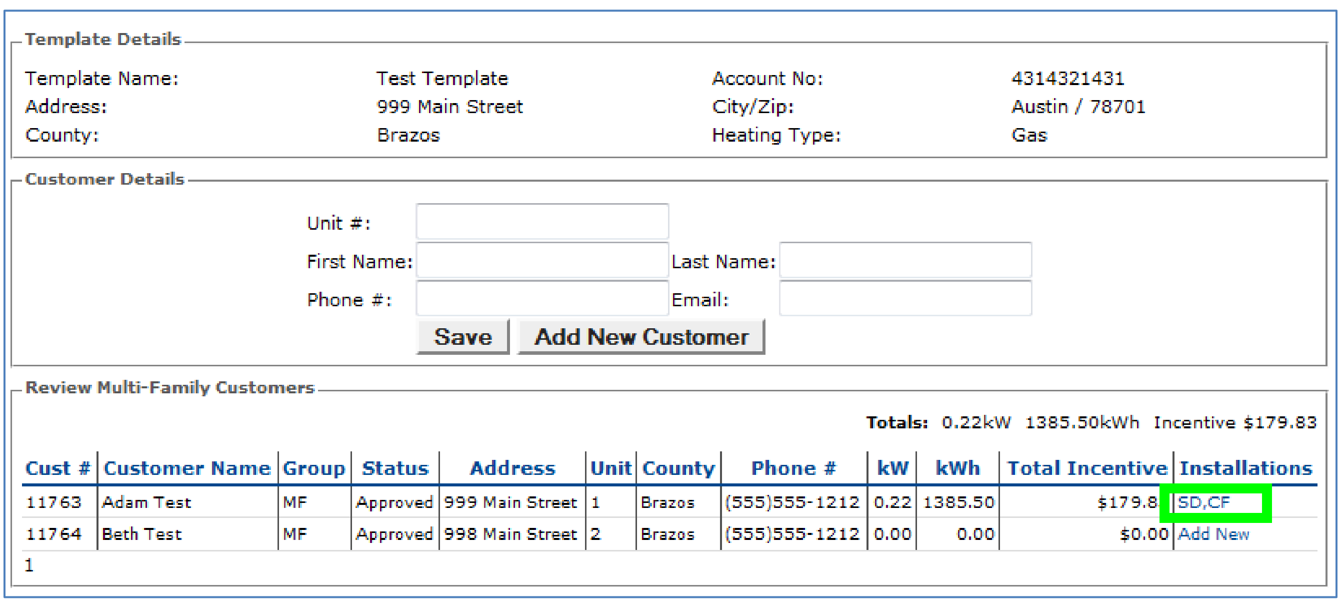


- Fill in the installation form and select the ***Save New Installation*** button.



- To view multi-family customers and installations, select the M***F Customer List*** link from the Implementation menu. Select the ***View/Add Customer*** link next to the appropriate template. You will a list of customers along with installation codes for each customer's installations under the ***Installations*** column.

- To view and/or edit an installation, select any of the installation code links next to the appropriate customer.



- To edit an installation, select the ***Edit*** link on the left side of the appropriate installation.
- To delete an installation, select the ***Delete*** link on the right side of the appropriate installation

Review/Edit Installations

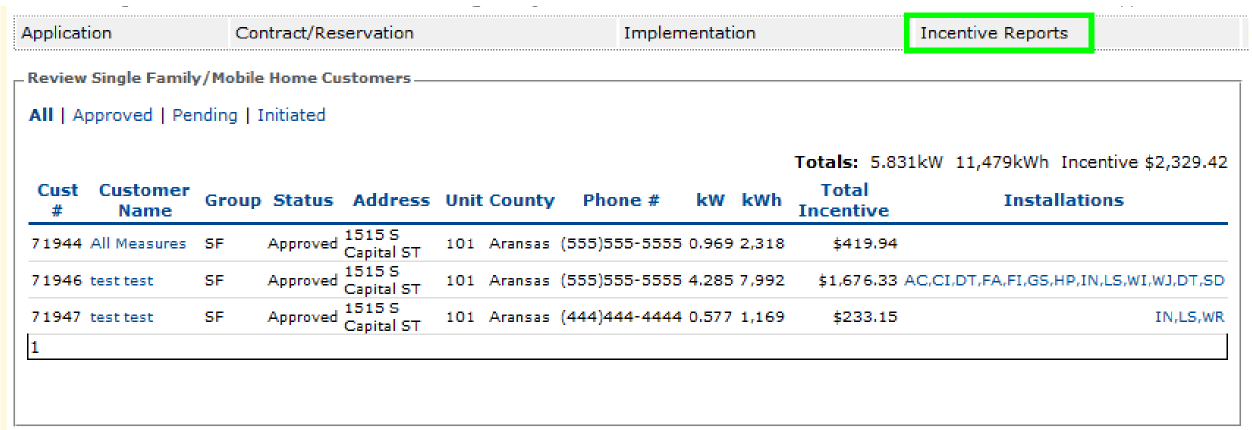
	Cust #	Customer Name	Address	Unit	City	State	Zip	Group	Inst #	Installation Type	kW	kWh	Incentive	
Edit	1763	Adam Test	999 Main Street	1	Austin	TX	78701	MF	21223	CFL Measures	0.22	1385.50	$179.83	Delete
Edit	11763	Adam Test	999 Main Street	1	Austin	TX	78701	MF	21222	Solar Water Heater	0.00	0.00	$0.00	Delete

-Installation Types- Add Back

INCENTIVE REPORT PROCESS

Step 12: Submit an Incentive Report

- Select the ***Incentive Reports*** tab from the top menu.
- Select the ***Eligible Customer List*** button.



Application | Contract/Reservation | Implementation | Incentive Reports

Review Single Family/Mobile Home Customers

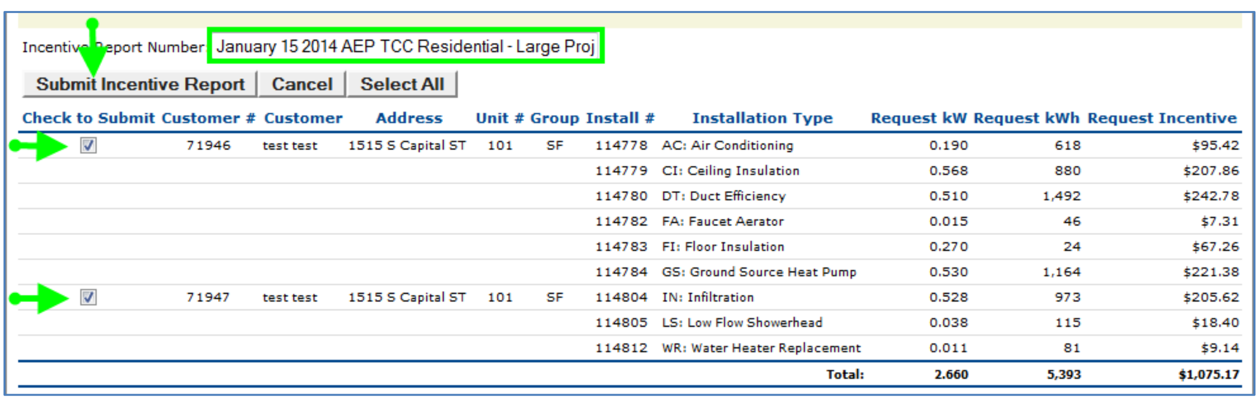
All | Approved | Pending | Initiated

Totals: 5.831kW 11,479kWh Incentive $2,329.42

Cust #	Customer Name	Group	Status	Address	Unit	County	Phone #	kW	kWh	Total Incentive	Installations
71944	All Measures	SF	Approved	1515 S Capital ST	101	Aransas	(555)555-5555	0.969	2,318	$419.94	
71946	test test	SF	Approved	1515 S Capital ST	101	Aransas	(555)555-5555	4.285	7,992	$1,676.33	AC,CI,DT,FA,FI,GS,HP,IN,LS,WI,WJ,DT,SD
71947	test test	SF	Approved	1515 S Capital ST	101	Aransas	(444)444-4444	0.577	1,169	$233.15	IN,LS,WR

1

- Select the checkbox next to the eligible customers that appear that you would like to include on your incentive report.
- Add a name for the incentive report in the ***Incentive Report Number*** field (this field may be pre-populated with an incentive report name by the system).
- Select the ***Submit Incentive Report*** button.

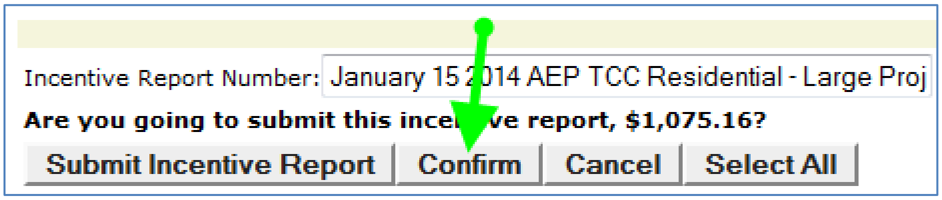


Incentive Report Number: January 15 2014 AEP TCC Residential - Large Proj

Submit Incentive Report | Cancel | Select All

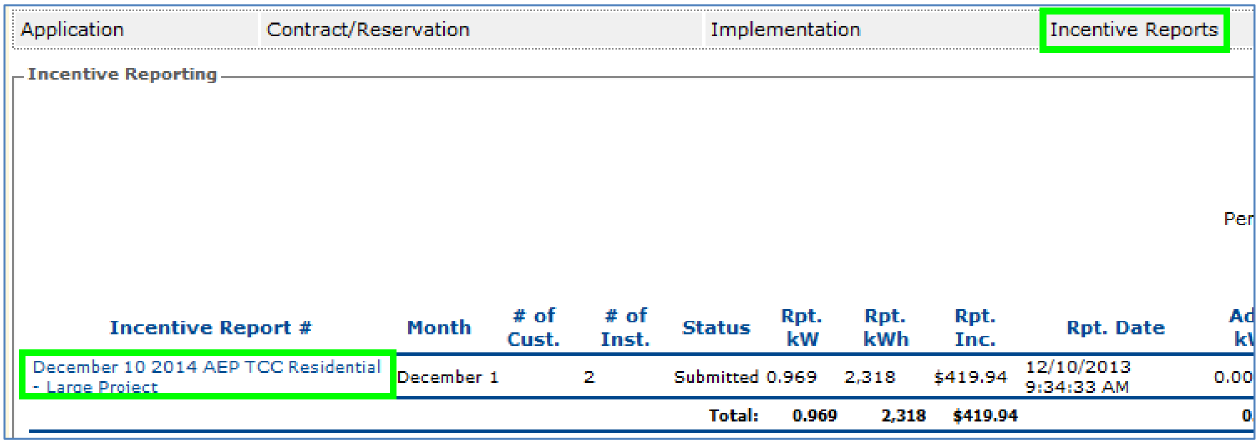
Check to Submit	Customer #	Customer	Address	Unit #	Group	Install #	Installation Type	Request kW	Request kWh	Request Incentive
☑	71946	test test	1515 S Capital ST	101	SF	114778	AC: Air Conditioning	0.190	618	$95.42
						114779	CI: Ceiling Insulation	0.568	880	$207.86
						114780	DT: Duct Efficiency	0.510	1,492	$242.78
						114782	FA: Faucet Aerator	0.015	46	$7.31
						114783	FI: Floor Insulation	0.270	24	$67.26
						114784	GS: Ground Source Heat Pump	0.530	1,164	$221.38
☑	71947	test test	1515 S Capital ST	101	SF	114804	IN: Infiltration	0.528	973	$205.62
						114805	LS: Low Flow Showerhead	0.038	115	$18.40
						114812	WR: Water Heater Replacement	0.011	81	$9.14
							Total:	**2.660**	**5,393**	**$1,075.17**

- You will be asked to confirm that you want to submit this Incentive Report. Please review your Incentive Report carefully before confirming. When you are ready to confirm, select the ***Confirm*** button.



Step 13: Review and Download Incentive Reports

- Select the ***Incentive Reports*** tab from the top menu to see a table of submitted Incentive Reports.
- Select the Incentive Report name link to review a particular Incentive Report.



- Select the ***Export To PDF*** button to download a PDF version of the Incentive Report.