

# Texas-New Mexico Power Company

2020 Residential and Hard-to-Reach  
Standard Offer Program Workshop

November 7, 2019

Dial In: (877) 783-2009

Passcode: 981535

# Webinar Instructions

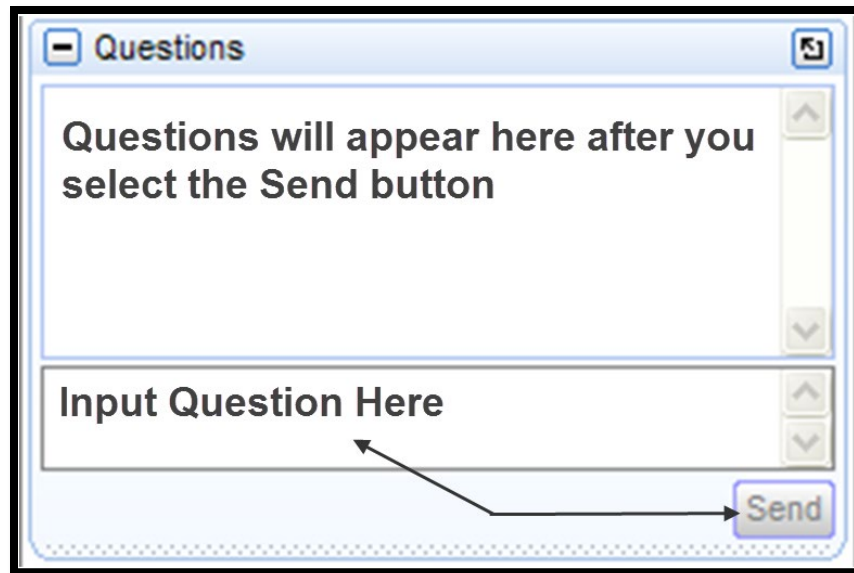
- ★ You can minimize the Webinar toolbar by selecting the red arrow button



- ★ You can select the same button to make the toolbar appear again

## Webinar Instructions (Cont.)

- ★ Attendees will be on mute during the call
- ★ You can ask a question by utilizing the Question Box located on the Webinar toolbar



# Workshop Agenda

- ★ Recap 2019
- ★ Challenges in 2019
- ★ Key Changes for 2020
- ★ 2020 Program Details
- ★ Database Changes for 2020
- ★ -10 Minute Break-
- ★ Question & Answer Session

# Program Contacts



## TNMP - Program Manager

Stefani Case

(214) 222-4174

[stefani.case@tnmp.com](mailto:stefani.case@tnmp.com)

## Frontier - Program Administrator

Rob Lovenguth

(737) 443-7841

[rlovenguth@frontierenergy.com](mailto:rlovenguth@frontierenergy.com)

# Recap 2019

# 2019 Program Summary



	Res SOP	HTR SOP	Total
<b>Budget</b>	\$1,211,503.89	\$323,789.07	\$1,535,292.96
<b># Customers</b>	1,047	202	1,249
<b># Installs</b>	3,478	557	4,035
<b>kW Savings</b>	3,033	520	3,553
<b>kWh Savings</b>	5,000,877	868,287	5,869,164

Reported values are finals for 2019.

# 2019 Program Challenges

## ★ Inspection issues

- ★ Listing correct heating type
- ★ Insulation certificate

## ★ Documentation Issues

- ★ Income Eligibility Forms
- ★ Single family vs. Multi-family documents

## ★ Scheduling issues



# Key 2020 Changes

# 2020 Key Changes

## ★ Measures

### ★ Duct Sealing and Air infiltration

- ★ Monometer Calibration within the past 2 years
- ★ HERS certification is required for Duct Sealing

### ★ Attic Insulation

- ★ Post installation pictures
- ★ If there is existing insulation, use an area weighted U-Factor to calculate the R-Value

### ★ Measure install bonus

- ★ Could qualify for a bonus if 80% or more of your projects install 2 or 3+ measures
- ★ One-time bonus after the program closes, max of 2 bonuses in 2020
- ★ 2020 is a transition year, the measure install of 2 or 3+ will be mandatory in 2021 without a bonus

# 2020 Program Details

# 2020 Program Details

## ★ Applications

- ★ Dates and deadlines are on slide 18
- ★ In 2020, TNMP will continue to allow applications to be created throughout the year

## ★ Marketing Materials

- ★ TNMP branded marketing piece will remain mandatory in 2020

## ★ Training Opportunities

# 2020 Program Details Cont.

## ★ Work Schedule

- Failing to maintain a work schedule could result in corrective action and/or termination from the program in 2020

## ★ Corrective Action

- First failure: Temporary suspension from the program until investigation is complete
    - After investigation, the first failure will stay on the Project Sponsors record for 60 days
    - A 10% penalty will be applied to incentive payments for affected measures or invoice
  - Second failure: Temporary suspension from the program until investigation is complete
    - After investigation, the second failure will stay on the Project Sponsors record for an additional 60 days
    - A 100% penalty applied to incentive payment for affected measures or invoice
  - Third failure: contract termination
- ★ TRM 7.0 will be available at [www.texasefficiency.com](http://www.texasefficiency.com) and [www.tnmpefficiency.com](http://www.tnmpefficiency.com) when finalized

# 2020 Program Details Cont.

## ★ In-Person Meetings

- ★ In 2019 TNMP scheduled in-person meetings with each Pre-Approved Project Sponsor before Approval
- ★ TNMP and Frontier will continue the in-person meetings with each Pre-Approved Project Sponsor for the 2020 program year

## ★ What to expect

- ★ Introductions
- ★ Application questions and clarifications
- ★ Discuss all forms of marketing
- ★ Any other questions or topics about the program year

# 2020 Program Funding



Program	Budget
Residential SOP	\$1,250,000
Hard-to-Reach SOP	\$350,000
Total	\$1,600,000

# 2020 Program Incentives



2020 Incentives	EUL	RES SOP		HTR SOP	
		\$/kW	\$/kWh	\$/kW	\$/kWh
Ceiling/Roof Insulation	25	\$229	\$0.10	\$323	\$0.18
Central AC	18	\$350	\$0.13	\$385	\$0.14
Central Heat Pump	15	\$425	\$0.14	\$465	\$0.15
LED	8Res/10HTR	\$3.50/Lamp	N/A	\$4.50/Lamp	N/A
Attic Encapsulation	25	\$229	\$0.10	\$323	\$0.18
Air Infiltration	11	\$200	\$0.08	\$230	\$0.10
Duct Sealing	18	\$260	\$0.12	\$340	\$0.13
Cool Roofs	15	\$250	\$0.07	\$270	\$0.11
A/C Tune-Up	5	\$130	\$0.12	\$170	\$0.11
Low-Flow Showerheads	10	\$225	\$0.07	\$270	\$0.11
Pool Pump	10	\$250/ea	N/A	N/A	N/A
All Other Measures	≥10	\$225	\$0.07	\$270	\$0.11



# Residential & HTR Incentives

- ★ Incentives are on a First Come – First Serve basis, no reservation required.
- ★ Incentives are paid directly to Project Sponsor.
- ★ Project Sponsor is not required to pass any incentive payment to the customer.
- ★ PUCT requires the Project Sponsor to disclose that incentives are available “through a ratepayer funded program, manufacturers, or other entities.”

# Important Application Dates

- ★ All Applications and Application Submissions Open:
  - Thursday, November 7, 2019 at 1:00pm
- ★ Residential and Hard-to-Reach Application Submission deadline:
  - Wednesday, November 20, 2019 by 1pm
- ★ Pre-Approval or Denied Notification:
  - Thursday, December 5, 2019
- ★ In-Person Meeting:
  - Scheduled between Tuesday December 11<sup>th</sup> and Friday December 20<sup>th</sup>
- ★ Approval Notification:
  - Monday, January 6, 2020
- ★ Program Start Date:
  - Monday, January 13, 2020

# Application Award Criteria

Criteria	Percentage
Prior Experience	25%
Comprehensive Measures	20%
Inspection Results	25%
Customer Complaints/Satisfaction	20%
References	10%

# Application Review Criteria

- ★ Previous program experience
  - Inspection results and feedback
  - Customer satisfaction
  - Timeliness in reporting and invoicing installations
  - Maintaining work schedule
  - Clean and complete paperwork
- ★ Offering a comprehensive set of measures
  - Measures offered vs measures performed
- ★ Serving a variety of counties
  - Areas served vs actual areas served
- ★ References
  - Utility references preferred
- ★ Supplemental Documentation
  - All required documentation must be uploaded to the database at the time the application is submitted

# Supplemental Documentation

(Required to be uploaded)



## ★ Insurance

- TNMP must be listed as additional insured
- Subcontractors must also provide proof of insurance (no need for TNMP as additional insured)
  - The proof of insurance can either be emailed or mailed to Stefani Case from the insurance agent

## ★ All appropriate licenses or certifications

- ★ HVAC licenses
- ★ Monometer calibration
- ★ HERS

# Project Sponsor Responsibilities

- ★ Submit marketing materials for review before use to
  - Stefani Case – [Stefani.Case@tnmp.com](mailto:Stefani.Case@tnmp.com)
- ★ Maintain Work Schedule
  - Failing to maintain a work schedule could result in corrective action and/or termination from the program in 2020
- ★ Identify project opportunities
  - Verify customer eligibility
  - Proposed measures cannot have been retrofitted in past 10 years
- ★ Enter into an agreement with Host Customer and have them sign Host Agreement and Acknowledgement form
- ★ Verbally inform customers about the inspection process and that they could be selected

# Project Sponsor Responsibilities (Cont.)



## ★ Hard-to-Reach Specific Requirements

- Hard-to-Reach customers are defined as those customers with a total household income of less than 200% of current federal poverty guidelines
- HTR customers must fill out Income Eligibility Self Certification Form
- HTR have to use the Multi-family Income Eligibility form for apartment complexes and other multi-family dwellings

# EM&V Process

- ★ PUCT is working with a third-party evaluator
- ★ Evaluator may contact you or your customers
- ★ Continue to keep all customer forms and agreements for your records
- ★ Evaluation results can impact future program approval decisions
- ★ Duct Sealing Resident Education



# 2020 Tracking System Changes

## P3 – Program Portfolio Portal

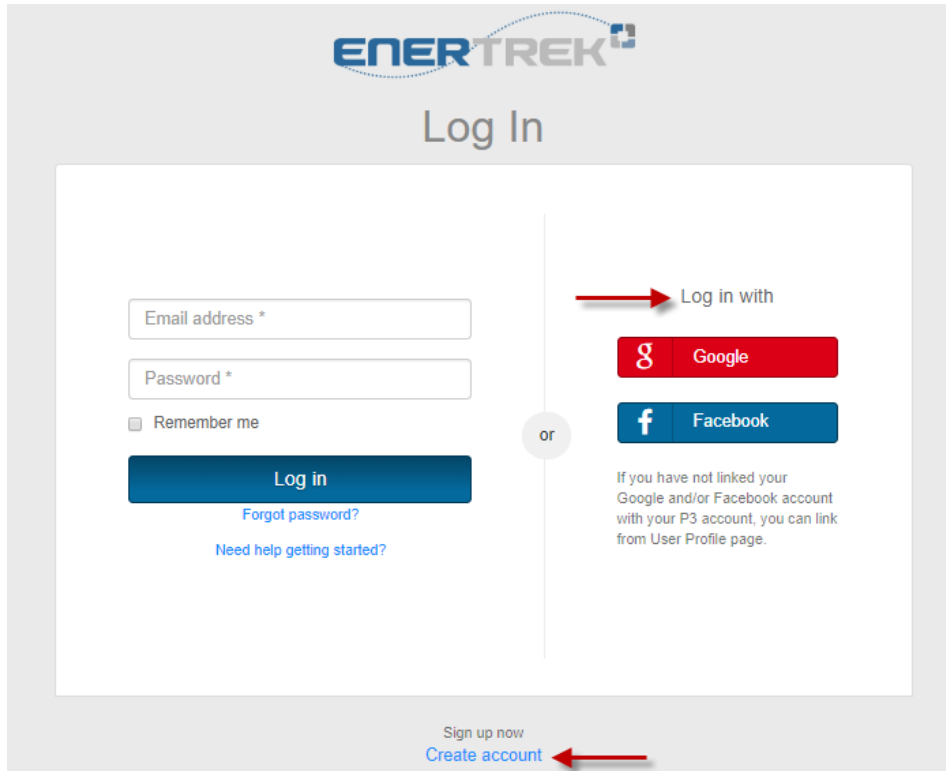
# P3 Registration and Enrollments



**PROGRAM PORTFOLIO PORTAL**

# P3 Registration Process

# P3 Registration



ENERTREK

Log In

Email address \*

Password \*

Remember me

Log in

[Forgot password?](#)

[Need help getting started?](#)

or

Log in with

Google

Facebook

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



## Log in

 Remember me

**Log in**

[Forgot password?](#)

[Need help getting started?](#) ←

[Sign up now](#)  
[Create account](#)

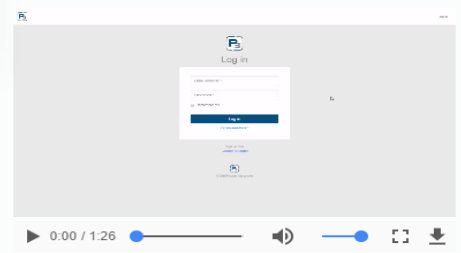
- ★ New P3 users can also access our P3 video tutorials by clicking the “Need help getting started?” link on the login page.

### Getting Started with P3

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

#### P3 Registration Process Video Tutorial

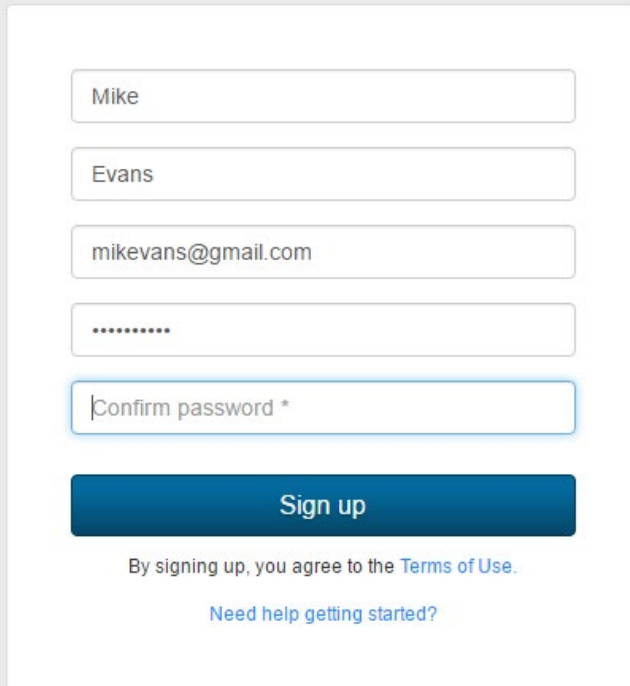
See how easy it is to use P3. Watch our Registration tutorial below to get started.



How to create your P3 Market Actor User Profile

# P3 Registration

## Sign up



Mike

Evans

mikevans@gmail.com

.....

Confirm password \*

**Sign up**

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

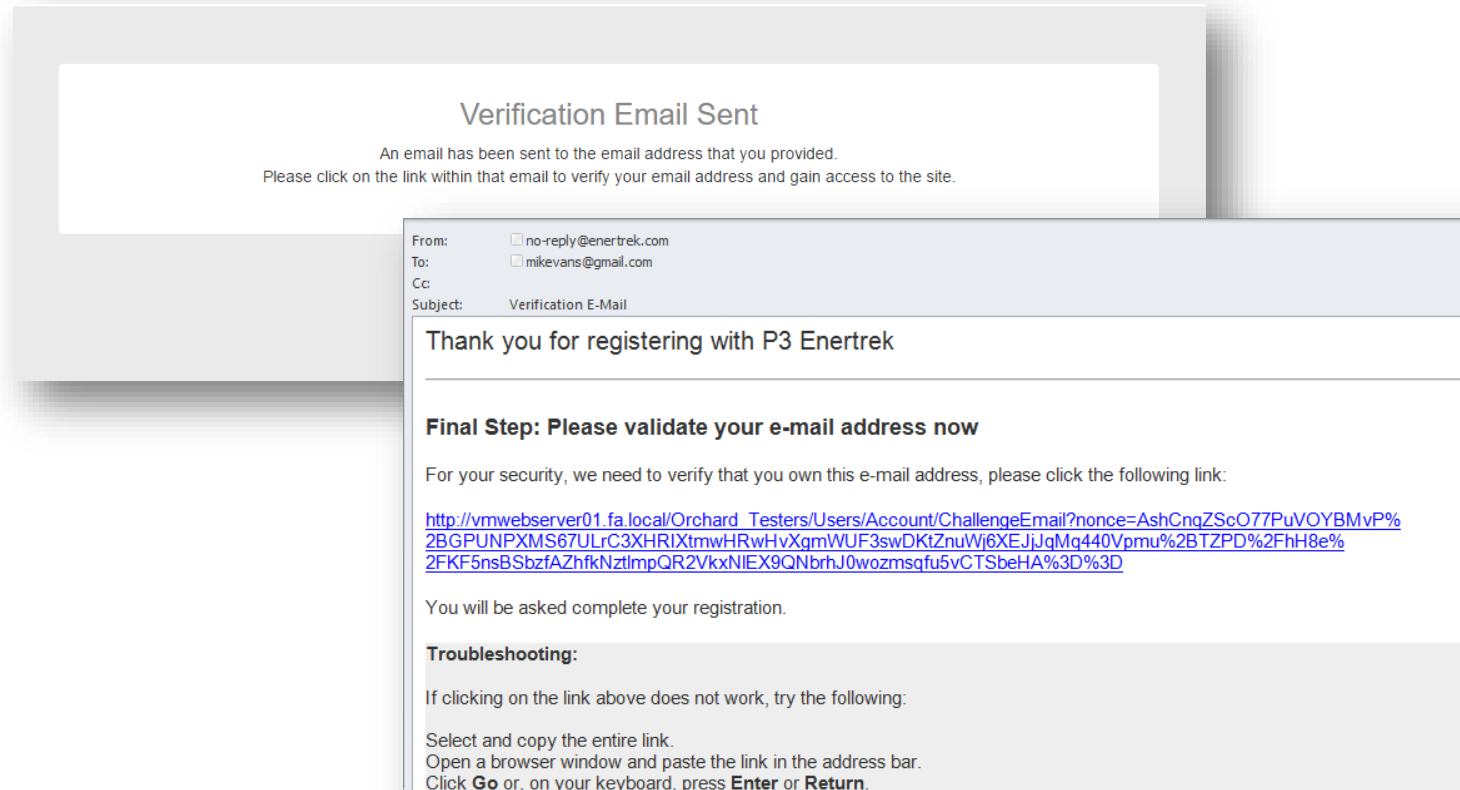
[Need help getting started?](#)

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

# 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



Verification Email Sent

An email has been sent to the email address that you provided.  
Please click on the link within that email to verify your email address and gain access to the site.

From:  no-reply@enertrek.com  
To:  mikevans@gmail.com  
Cc:  
Subject: Verification E-Mail

Thank you for registering with P3 Enertrek

**Final Step: Please validate your e-mail address now**

For your security, we need to verify that you own this e-mail address, please click the following link:

[http://vmwebservice01\\_fa.local/Orchard\\_Testers/Users/Account/ChallengeEmail?nonce=AshCnqZScO77PuVOYBMvP%2BGPUNPXMS67ULrC3XHRlXtmwHRwHvXgmWUF3swDKtZnuWj6XEJjJqMq440Vpmu%2BTZPD%2FhH8e%2FKF5nsBSbzfAZhfkNztlmpQR2VlxNIEX9QNbrhJ0wozmsqfu5vCTSbeHA%3D%3D](http://vmwebservice01_fa.local/Orchard_Testers/Users/Account/ChallengeEmail?nonce=AshCnqZScO77PuVOYBMvP%2BGPUNPXMS67ULrC3XHRlXtmwHRwHvXgmWUF3swDKtZnuWj6XEJjJqMq440Vpmu%2BTZPD%2FhH8e%2FKF5nsBSbzfAZhfkNztlmpQR2VlxNIEX9QNbrhJ0wozmsqfu5vCTSbeHA%3D%3D)

You will be asked complete your registration.

**Troubleshooting:**

If clicking on the link above does not work, try the following:

Select and copy the entire link.  
Open a browser window and paste the link in the address bar.  
Click **Go** or, on your keyboard, press **Enter** or **Return**.

# P3 User 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

- ★ After selecting the link in the verification email, users will be taken back to P3 to complete their Company Profile
- ★ Select the Market Actor icon and click the Next button



# P3 User 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 User Profile Set-Up

## Complete Market Actor Profile

Verify Tax ID >

**Profile Form** >

Submit Profile >

Minority Owned

Disabled Veteran Owned

**Company Contact First Name \***

**Company Contact Last Name \***

**Phone 1 \***

**Phone 2 \***

**Email \***


**Physical Address 1 \***

# P3 User 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](#)

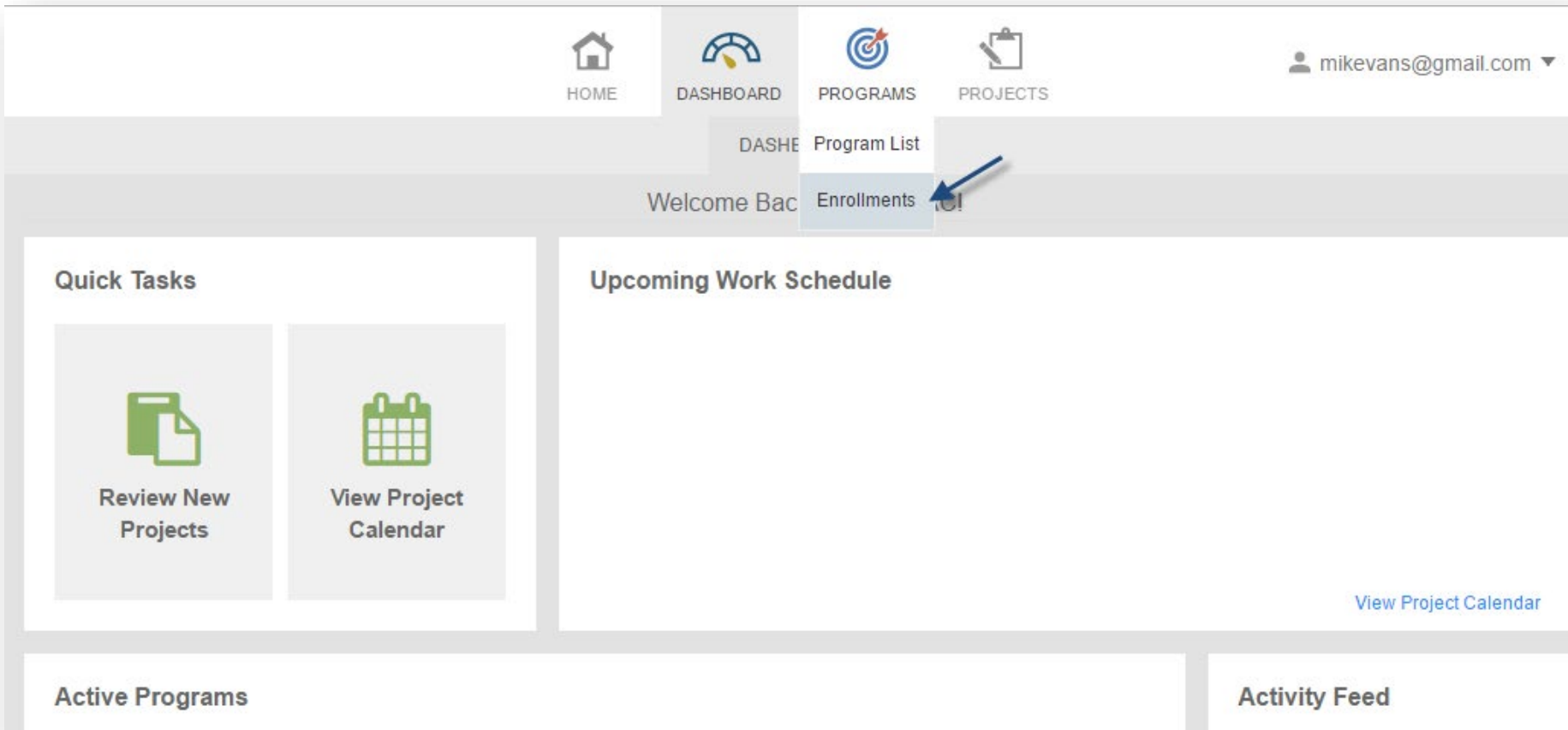
# P3 Enrollment Process

# 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



HOME DASHBOARD PROGRAMS PROJECTS

mikevans@gmail.com

Program List

Enrollments

Welcome Back

### Quick Tasks

Review New Projects

View Project Calendar

### Upcoming Work Schedule

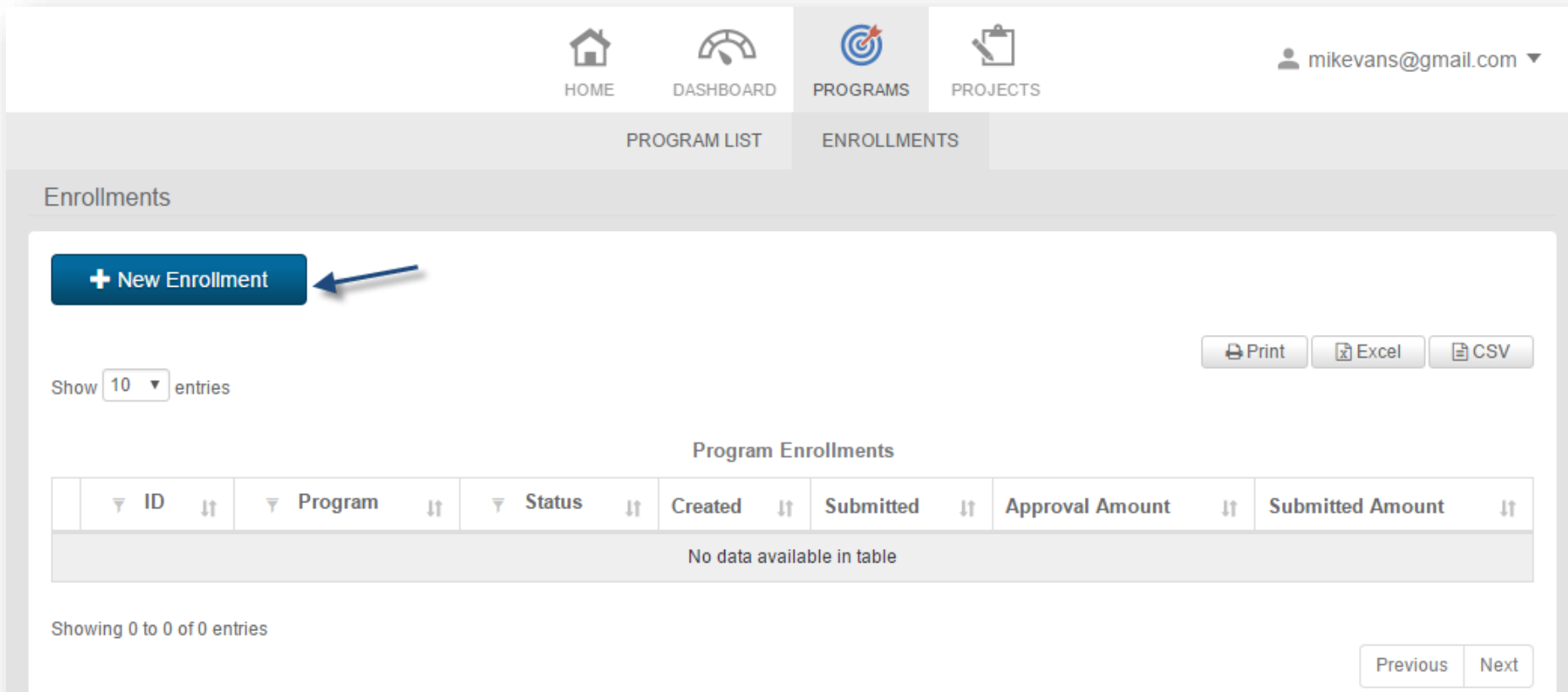
View Project Calendar

### Active Programs

### Activity Feed

# P3 Enrollment Application

- ★ Select the + New Enrollment button in blue



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PROGRAM LIST ENROLLMENTS

Enrollments

[+ New Enrollment](#) [Print](#) [Excel](#) [CSV](#)

Show 10 entries

Program Enrollments

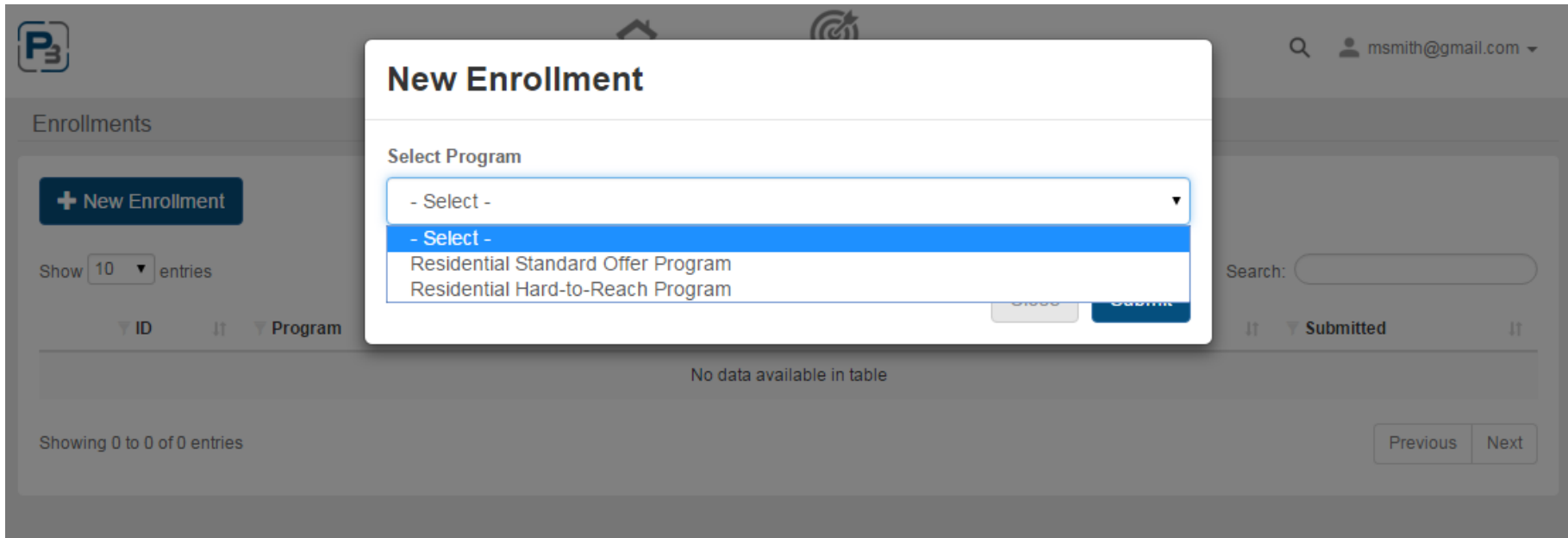
ID	Program	Status	Created	Submitted	Approval Amount	Submitted Amount
No data available in table						

Showing 0 to 0 of 0 entries

Previous Next

# 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

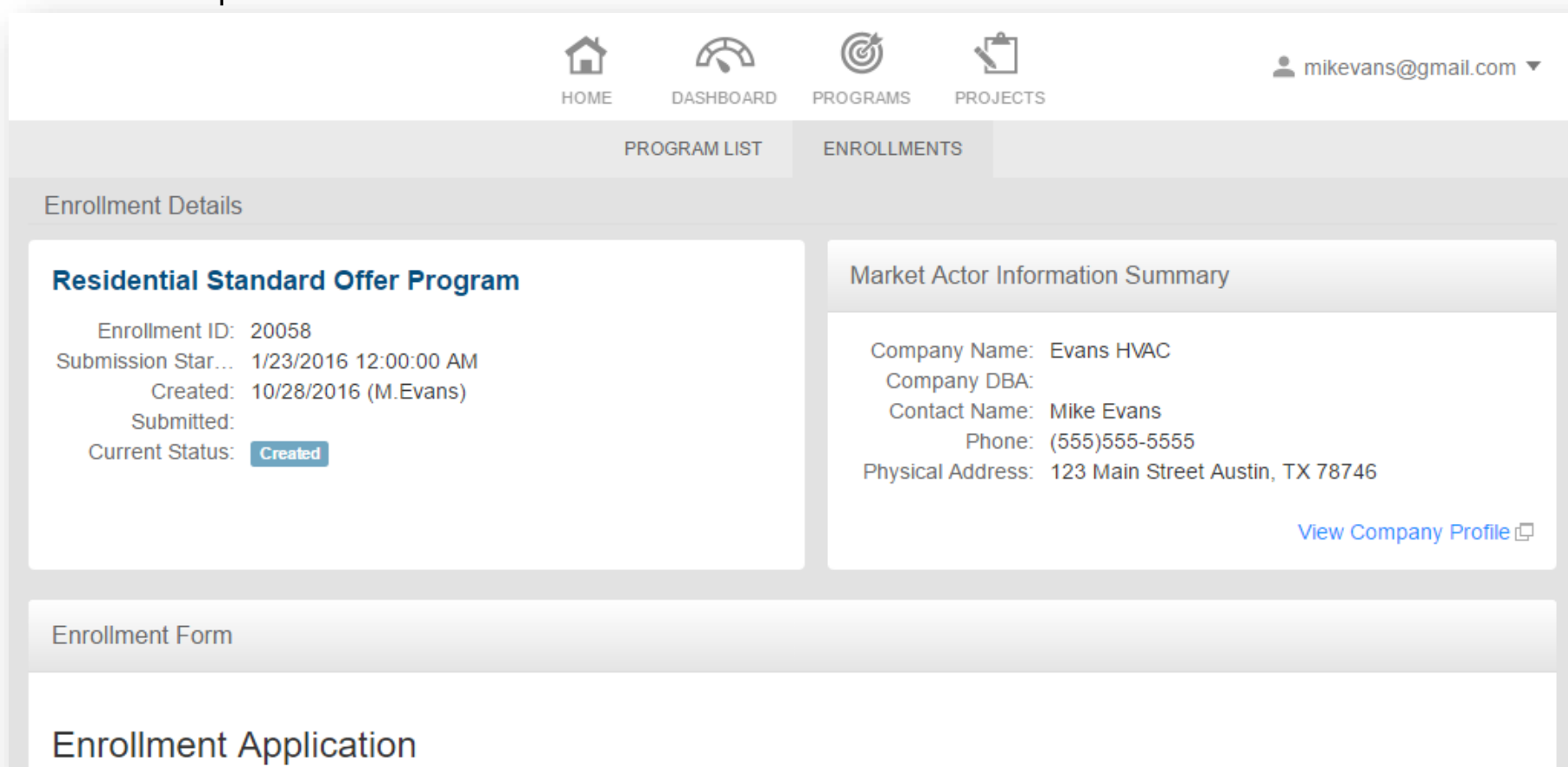


The screenshot displays the P3 Enrollment Application interface. A modal titled "New Enrollment" is open, featuring a "Select Program" dropdown menu. The dropdown menu is open, showing the following options: "- Select -", "- Select -", "Residential Standard Offer Program", and "Residential Hard-to-Reach Program". The background interface includes a "New Enrollment" button, a search bar, and a table with columns for "ID", "Program", and "Submitted". The table currently shows "No data available in table".



# P3 Enrollment Application

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



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PROGRAM LIST ENROLLMENTS

### Enrollment Details

#### Residential Standard Offer 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

### Enrollment Application

# 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

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

Please list the contractors that you will be using (separated by commas). \*

## Affiliated Firms

Does your company have any affiliated firms? \*

1.  Yes
2.  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


# P3 Enrollment Application


- ★ Once the application has been submitted, it will be displayed on the Program Enrollments table
- ★ Once the application has been Approved or Denied, the status will be updated on this table and an email will be sent to you
- ★ Repeat steps one thru ten to apply to another program

  
HOME

  
DASHBOARD

  
PROGRAMS

  
PROJECTS

 mikevans@gmail.com ▼

Your enrollment has been submitted

## Enrollments

+ New Enrollment

Print

Excel

CSV

Show  entries

**Program Enrollments**

	▼ ID ↑↓	▼ Program ↑↓	▼ Status ↑↓	Created ↑↓	Submitted ↑↓	Approval Amount ↑↓	Submitted Amount ↑↓
	20058	Residential Standard Offer Program	Submitted	10/28/2016	10/28/2016		\$0.00

Showing 1 to 1 of 1 entries

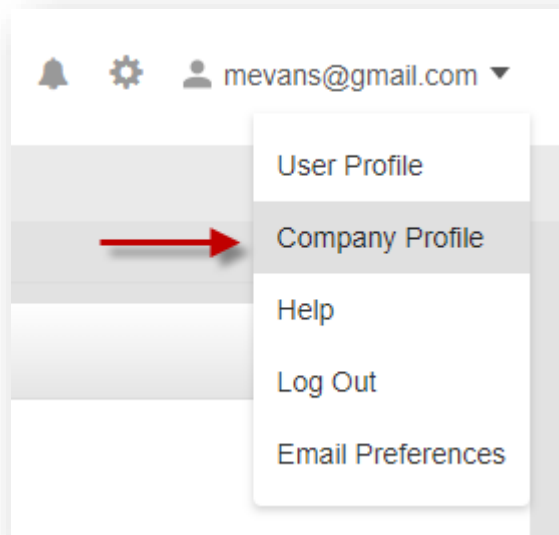
Previous

1

Next

# P3 Required Company Documents

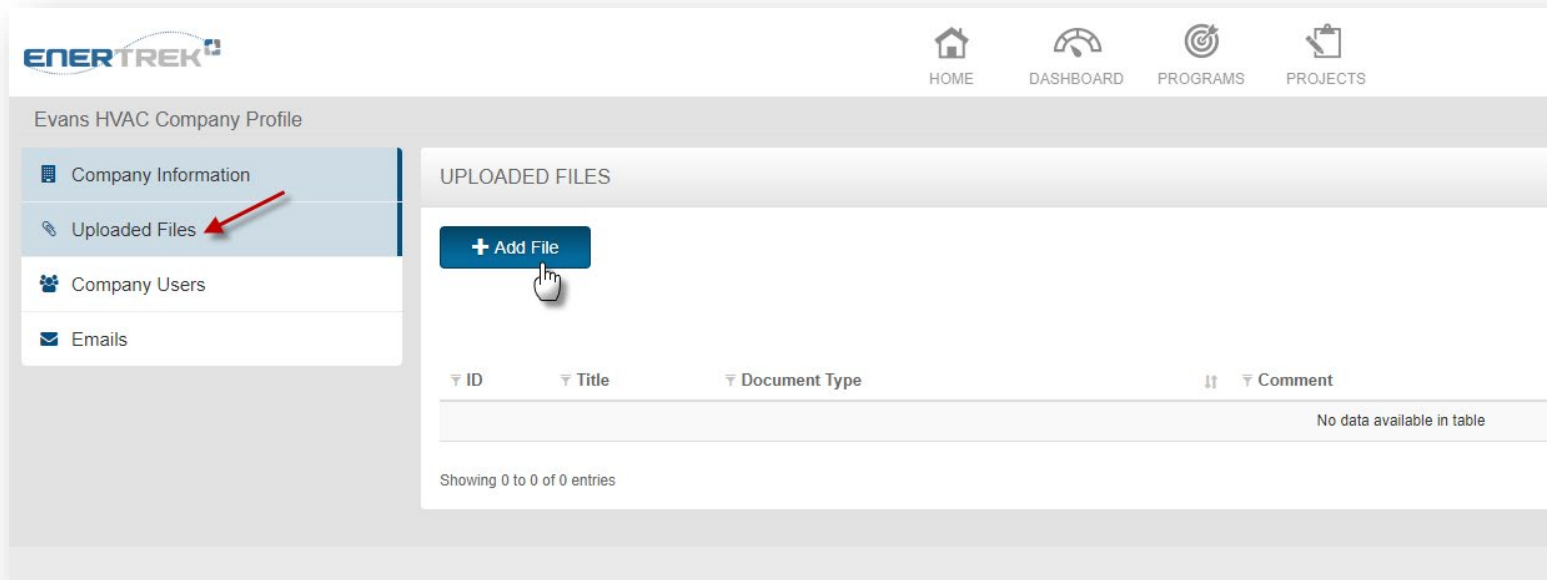
The Company Profile section is where Market Actors will upload certifications, licenses, W9s and any other required documentation relating to their Enrollment Application



- ★ 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



ENERTREK

HOME DASHBOARD PROGRAMS PROJECTS

Evans HVAC Company Profile

- Company Information
- Uploaded Files
- Company Users
- Emails

UPLOADED FILES

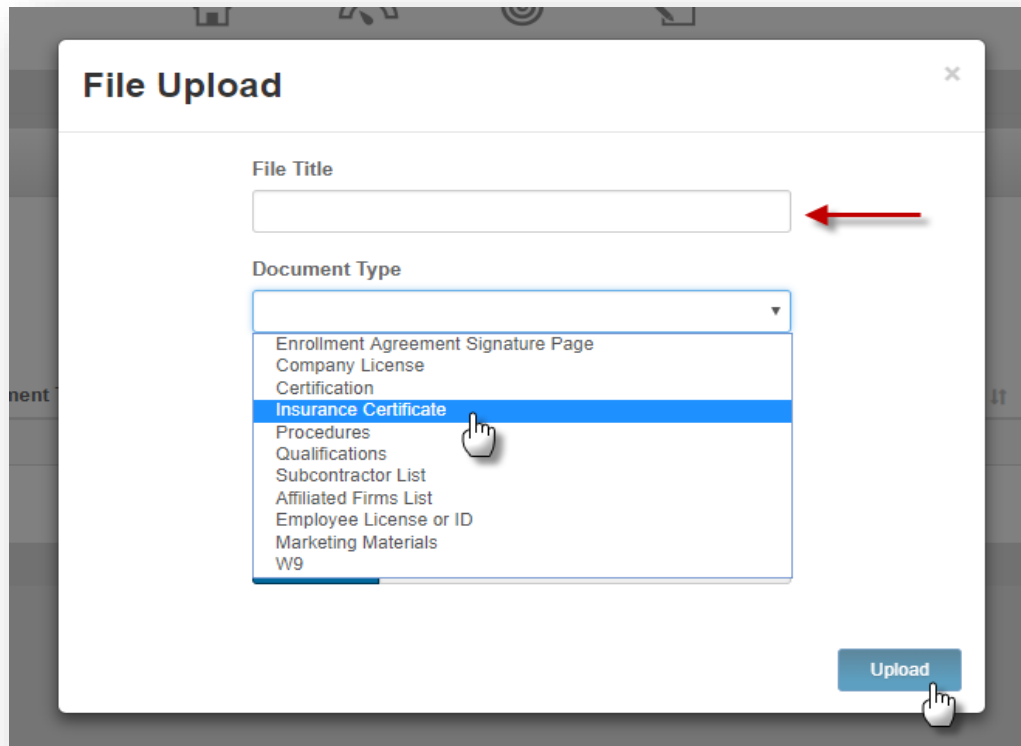
+ Add File

ID	Title	Document Type	Comment
No data available in table			

Showing 0 to 0 of 0 entries

# P3 Required Company Documents

The File Upload modal will appear



**File Upload**

File Title

Document Type

- Enrollment Agreement Signature Page
- Company License
- Certification
- Insurance Certificate**
- Procedures
- Qualifications
- Subcontractor List
- Affiliated Firms List
- Employee License or ID
- Marketing Materials
- W9

Upload

- ★ 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**

# Res & HTR Resources

★ P3 Tracking System URL:

[TNMP.P3.EnerTrek.com](http://TNMP.P3.EnerTrek.com)

★ Res/HTR Program Information under Homes – Existing Homes:

[www.tnmpefficiency.com](http://www.tnmpefficiency.com)

★ Downloads:

- SOP Agreement
- Program Manual
- P3 Training Videos
- Host Customer Agreement
- Customer Acknowledgement and Certificate
- Income Eligibility Forms (single and multi-family)
- Field Data Sheet
- Service Territory
- Deemed Savings Engine Portal
- Vendor Profile Form



# 10 Minute Break

Use the webinar toolbar to ask questions

# Question and Answer Session

Use the webinar toolbar to ask questions