



# Texas-New Mexico Power Company

2024 Residential and Hard-to-Reach  
Standard Offer Programs Kick-Off

November 15<sup>th</sup>, 2023

Dial In: 1(505) 373-1537

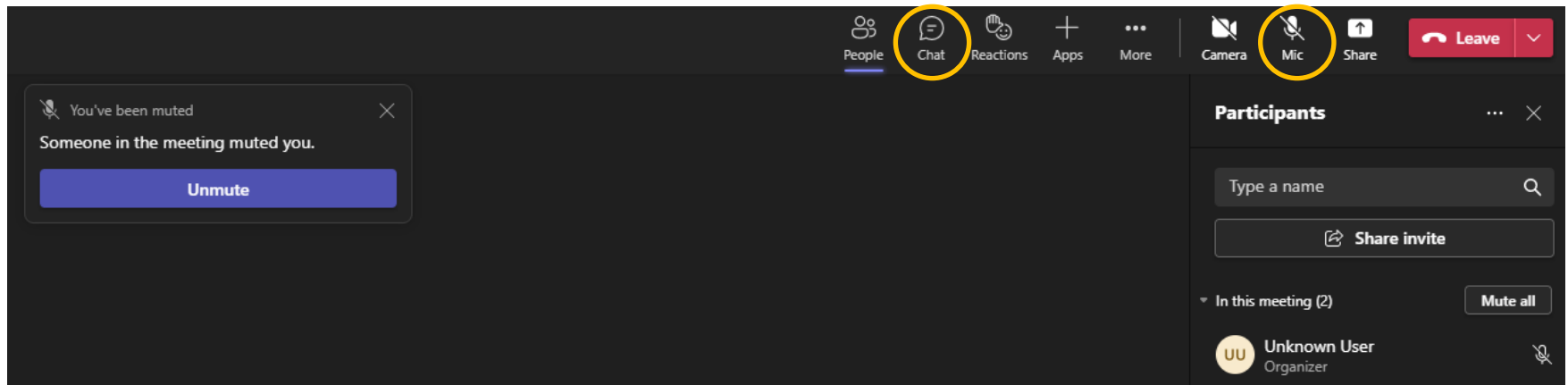
Access Code: 338-621-834#

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# Meeting Instructions



- ★ Please stay on mute during the call except when asking questions, which can be done at the end of slides
- ★ Please mute yourself after asking your question
- ★ You can ask a question by utilizing the chat function please remember everyone can see your question



# Agenda



- ★ Program Basics
- ★ Recap 2023
- ★ 2024 Program Changes
- ★ 2024 Application Process
- ★ 2024 Tracking System Changes P3
- ★ P3 Enrollment Process

# Program Contacts



## TNMP - Program Manager

Morgan Nielsen  
(214) 222-4186  
[morgan.nielsen@tnmp.com](mailto:morgan.nielsen@tnmp.com)

## Frontier - Program Administrator

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

A yellow graphic consisting of a plug on the left and a horizontal line extending to the right, positioned at the top of the slide.

# Program Basics

# Energy Efficiency Programs



- ★ State Mandated, Rate Payer Funded
  - ★ Not government funded
- ★ Overseen by The Public Utility Commission of Texas
  - ★ EM&V Team: Tetra Tech
- ★ Eligible measures found in the TRM 11.0- Volume 2
  - ★ Will be available at [www.texasefficiency.com](http://www.texasefficiency.com)
- ★ Reduce energy & peak demand
- ★ Agreement with Frontier



# Project Sponsor Responsibilities



## ★ Identify Project Opportunities

- ★ Market program and offerings
- ★ Maintain Work Schedule: Marketing & Installation
- ★ Verify customer eligibility
- ★ Verify measure eligibility

## ★ Complete Projects

- ★ Before starting work: Host Customer Agreement Form
- ★ After completing work: Customer Acknowledgement Form
- ★ Inform customers of possible post inspections

## ★ Submit Completed Projects



# Project Sponsor Responsibilities (Cont.)



## ★ Hard-to-Reach Specific Requirements

- ★ Hard-to-Reach is defined as meeting at least one eligibility requirement on the PUCT's customer income eligibility forms
- ★ HTR customers in single family homes or property managers of multifamily properties must fill out the correct set of forms to certify Hard-To-Reach eligibility found on our website
- ★ Proof required for Cat1A and Cat2
- ★ Cat1C- [LMISD](#) & [HUD QCT](#)

## ★ Project Submittals and Inspections

- ★ Please no large batch submittals throughout the year
- ★ Work with inspector to complete ride-alongs or virtual inspections



# Corrective Action



- ★ Problematic work and failure to adhere to program requirements instigates one or more the following corrective actions
  - ★ Repairs, rework, or resubmittal of required documentation
  - ★ Participating in additional training
  - ★ Reduction or elimination of incentives
  - ★ Suspension of Project Sponsor's ability to install some or all measures
  - ★ Contract termination



# Evaluation Measurement & Verification Process



- ★ The PUC contracts with a third-party evaluator, the EM&V Team: Tetra Tech
- ★ Tetra Tech may contact you or the customers you've served
- ★ Keep all customer forms and agreements for your records
- ★ Evaluation results can impact future program approval decisions

2022 HTR Impact Evaluation	
Contribution to portfolio savings (kW)	3.5%
Claimed (kW) savings	479
Evaluated (kW) savings	479
Realization rate (kW)	100%
Contribution to portfolio savings (kWh)	6.4%
Claimed (kWh) savings	1,154,512
Evaluated (kWh) savings	1,154,512
Realization rate (kWh)	100%
Program documentation score	Good

# Residential & HTR Incentives



## ★ Incentives are:

- ★ First Come – First Serve
  - ★ Reserved when a project is submitted
  - ★ Paid directly to Project Sponsor.
- ★ PUCT requires the Project Sponsor to disclose that incentives are available “through a ratepayer funded program, manufacturers, or other entities.”
- ★ Initial spending cap will be set at 20% of budget
- ★ Budget set-aside of 5% for projects with high priority measures that will be added back into the budget in September

# 25C Tax Credit



- ★ Energy Efficient Home Improvement Credit- 26 USC 25C
  - ★ CEE & [25C tax credit](#)
  - ★ ENERGY STAR® Certified Products
- ★ Insulation & Air Sealing- 30% of material cost.
  - ★ Includes insulation, weatherstripping, caulk and expandable foam.
  - ★ Materials or systems must meet International Energy Conservation Code 2 years prior
- ★ Central AC Replacements- 30% of project cost up to \$600
  - ★ Min:  $\geq 16$  SEER2 &  $\geq 12$  EER2
- ★ Heat Pump Replacements- 30% of project cost max of \$2000
  - ★ Min:  $\geq 15.2$  SEER2,  $\geq 11.7$  EER2, &  $\geq 7.8$  HSPF2



# Recap 2023



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# 2023 Program Summary



Reported values are unverified finals for 2023

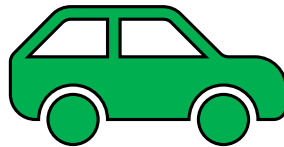
	Res SOP	HTR SOP	Total
Budget	\$1,299,828.33	\$375,311.81	\$1,675,140.14
# Customers	2136	595	2,731
# Installs	6,233	986	7,219
kW Savings	1,937.48	573.36	2,083.75
kWh Savings	3,847,636.69	995,926.45	4,843,563.14



**56,757**

Tree seedlings grown  
for 10 years

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**764**

Passenger vehicles  
driven for one year



**668**

Homes' electricity  
usage for one year



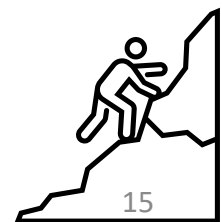
**130,097**

Incandescent lamps  
switched to LEDs

# 2023 Program Challenges



- ★ Inflation
- ★ Project Completion Rate
- ★ Communication
  - ★ Post Inspections
- ★ Low Income Verification
- ★ Measures Performed



# 2024 Key Changes



- ★ Section 1.8 in Program Manual
- ★ New Measures and Incentive Rates
  - ★ Duct Sealing Alternate Approach Added
  - ★ Increased Incentive Rates: Ceiling Insulation & HP Water Heater
  - ★ Decreased Incentive Rates: APS, LED (HTR only)
  - ★ Separate incentive for multifamily HVAC
- ★ Early Bird Bonus- \$100/SF home until March 31<sup>st</sup>
- ★ Underserved County Bonus- 10% bonus all measures in following counties (North, Central, Gulf, West Texas): Clay, Erath, Grayson, Hood, Johnson, Matagorda, Pecos, Stephens, Van Zandt, Ward, Young
- ★ 3 Measure Requirement on 80% of homes
- ★ Primary & Secondary Tier Measures



# 2024 Key Changes (Cont.)



- ★ Coordination of post inspection when requested onsite or virtual
  - ★ Ride-along within first 4 months or 2 months if completing air infiltration
- ★ Mandatory leave behinds only provided via pdf
- ★ No Monthly Meetings
- ★ Form Changes
  - ★ Field Data Sheet (optional)
  - ★ Host Customer Agreement Consolidation
  - ★ Customer Acknowledgment Form Consolidation

# 2024 Program Incentives



Incentives	EUL	Res SOP		HTR SOP	
		\$/kW	\$/kWh	\$/kW	\$/kWh
<b>Primary Measures</b>					
Ceiling, Wall, & Floor Insulation: (Gas)	25	\$384	\$0.20	\$430	\$0.24
(Electric)		\$352	\$0.19	\$394	\$0.22
Heat Pump Water Heaters (≤55 gal)	13	\$400		\$500	
(>55 – 120 gal)		\$50		\$100	
Attic Encapsulation	25	\$229	\$0.10	\$323	\$0.18
Duct Sealing	18	\$175		\$250	
Air Infiltration	11	NA	NA	\$275	\$0.11
Deemed Savings AC and HP Tune-Up	5	\$55		\$55	
HVAC System Replacement	See Next Slides				
<b>Secondary Measures</b>	<b>EUL</b>	<b>\$/unit</b>		<b>\$/unit</b>	
Advanced Power Strip/ Small APSs (PowerTap)	10	\$40/APS		\$50/APS	
		\$20/Small APS		\$20/Small APS	
Smart Thermostat (Single family)	11	\$125/thermostat		\$175/thermostat	
(Multifamily)		\$50/thermostat		\$65/thermostat	
LED (General Service or Specialty)	16/20	NA		\$3.00/Lamp	
Faucet Aerator	10	\$3.50/aerator		\$4.50/aerator	
Low-Flow Showerhead	10	\$35/showerhead		\$45/showerhead	
Water Heater Pipe Wrap	13	\$5/wrap		\$10/wrap	
	<b>EUL</b>	<b>\$/kW</b>	<b>\$/kWh</b>	<b>\$/kW</b>	<b>\$/kWh</b>
All Other Measures	≥10	\$225	\$0.07	\$270	\$0.11

# 2024 Program HVAC Incentive Rates



## SEER2 Central HVAC Systems

	RES SOP		HTR SOP	
<b>Replace On Burnout</b> SEER2	AC & Heat Pump	HP Replacing AC and Electric Resistance Heat	AC & Heat Pump	HP Replacing AC and Electric Resistance Heat
15.2-17.19	\$50/ton	\$1400/system	\$125/ton	\$1900/system
17.2-19.99	\$150/ton	\$1500/system	\$225/ton	\$2000/system
20.0+	\$225/ton	\$1700/system	\$325/ton	\$2200/system
Multifamily units*		\$1000/system		\$1300/system
	RES SOP		HTR SOP	
<b>Early Retirement</b> SEER2	AC & Heat Pump	HP Replacing AC and Electric Resistance Heat	AC & Heat Pump	HP Replacing AC and Electric Resistance Heat
15.2-17.19	\$125/ton	\$1800/system	\$225/ton	\$2300/system
17.2-19.99	\$200/ton	\$2000/system	\$300/ton	\$2500/system
20.0+	\$300/ton	\$2200/system	\$400/ton	\$2700/system
Multifamily units*		\$1300/system		\$1500/system

## SEER2 Mini-Split Systems Incentives

<b>Replace on Burnout</b>	15.2-16.19	16.2-17.19	17.2-20.99	21+
Mini-Split HP & AC	\$75/ton	\$150/ton	\$300/ton	\$350/ton
Mini-Split HP replacing ER	\$250/ton	\$350/ton	\$500/ton	\$600/ton
<b>Early Retirement</b>	15.2-16.19	16.2-17.19	17.2-20.99	21+
Mini-Split HP & AC	\$150/ton	\$250/ton	\$350/ton	\$400/ton
Mini-Split HP replacing ER	\$350/ton	\$550/ton	\$650/ton	\$750/ton
<b>New Construction</b> Mini-Split HP & AC	\$75/ton	\$150/ton	\$300/ton	\$350/ton

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# 2024 Program Funding



Program	Budget
Residential SOP	\$1,000,000
Hard-to-Reach SOP	\$375,000
Total	\$1,375,000

A yellow graphic of a three-prong electrical plug is positioned on the left side of the slide. A thin yellow horizontal line extends from the plug across the top of the slide towards the right edge.

# 2024 Application Process

# Important Program Dates



- ★ All Applications and Application Submissions open: **Wednesday, November 15, 2023, at 12:00pm**
- ★ Residential & Hard-to-Reach Application Submission deadline: **Friday, November 29, 2023, at 5:00pm**
- ★ Pre-Approved Notification: **Wednesday, December 6, 2023, 5:00pm**
- ★ Pre-Approval Interviews: **Scheduled December 11-15, 2023**
- ★ Approval or Denied Notification: **Friday, December 22, 2023**
- ★ Program Start Date: **Monday, January 15, 2024**
- ★ Last day to submit new projects: **November 29, 2024**

# Supplemental Documentation

(Required to be uploaded)



## ★ Insurance

- ★ Frontier Energy and TNMP must be listed as additional insured
- ★ Subcontractors must also provide proof of insurance to Project Sponsor (no need for additional insureds)
  - ★ The proof of insurance must be emailed from the insurance agent to Morgan Nielsen, [Morgan.Nielsen@tnmp.com](mailto:Morgan.Nielsen@tnmp.com)

## ★ All appropriate licenses or certifications including but not limited to

- ★ Texas State Board of Plumbing Examiners license
- ★ HVAC licenses
- ★ BPI
- ★ HERS
- ★ Manometer calibration

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# 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
- ★ 3 measures in 80% of homes

## ★ Offering & performing 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 uploaded at time of application submission



# Application Award Criteria



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

# 2024 Program Pre-Approval



## ★ Pre-Approval Interviews

- ★ TNMP may conduct virtual pre-approval interviews with Pre-Approved Project Sponsors for the 2024 Program Year

## ★ What to expect

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

A yellow icon of a plug with a horizontal line extending to the right, spanning across the top of the slide.

# 2024 Tracking System Changes

## P3 – Program Portfolio Portal

# P3 Registration



<https://tnmp.p3.enertrek.com>

A screenshot of the ENERTREK P3 registration page. The page has a light gray background. At the top center is the ENERTREK logo, which consists of the word "ENERTREK" in a blue, sans-serif font with a dotted line forming a partial circle around the letters "R" and "E". Below the logo is the text "Log In". The main content area is a white box with a thin gray border. On the left side of this box are two input fields: "Email address \*" and "Password \*". Below these fields is a checkbox labeled "Remember me". A blue button labeled "Log in" is positioned below the checkbox. Underneath the "Log in" button are two links: "Forgot password?" and "Need help getting started?". On the right side of the white box, there is a vertical line. To the right of this line is the text "Log in with" with a red arrow pointing to it. Below this text are two buttons: a red button with the Google "G" logo and the word "Google", and a blue button with the Facebook "f" logo and the word "Facebook". Below these buttons is a small circle containing the word "or". Further down is a paragraph of text: "If you have not linked your Google and/or Facebook account with your P3 account, you can link from User Profile page." At the bottom of the white box, there is a link "Sign up now" with "Create account" in blue text below it. A red arrow points to the "Create account" link.

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

# P3 Registration



## Sign up

A screenshot of a web registration form titled "Sign up". The form is contained within a white box on a light gray background. It consists of five input fields stacked vertically: a first name field containing "Mike", a last name field containing "Evans", an email address field containing "mikevans@gmail.com", a password field containing seven dots, and a "Confirm password \*" field. Below the fields is a dark blue button with the text "Sign up" in white. Underneath the button, there is a line of text: "By signing up, you agree to the [Terms of Use](#)." Below that is a link: "[Need help getting started?](#)". At the bottom of the form area, there is a link: "Have an account? [Log in](#)".

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- ★ 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 Registration



Log in

Email address \*

Password \*

Remember me

Log in

[Forgot password?](#)

[Need help getting started?](#)

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

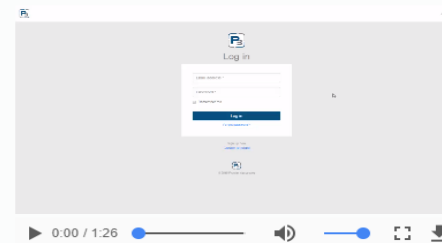
- ★ New P3 users can also access our P3 video tutorials by clicking the “Need help getting started?” link on the login page.

## Getting Started with P3

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

### P3 Registration Process Video Tutorial

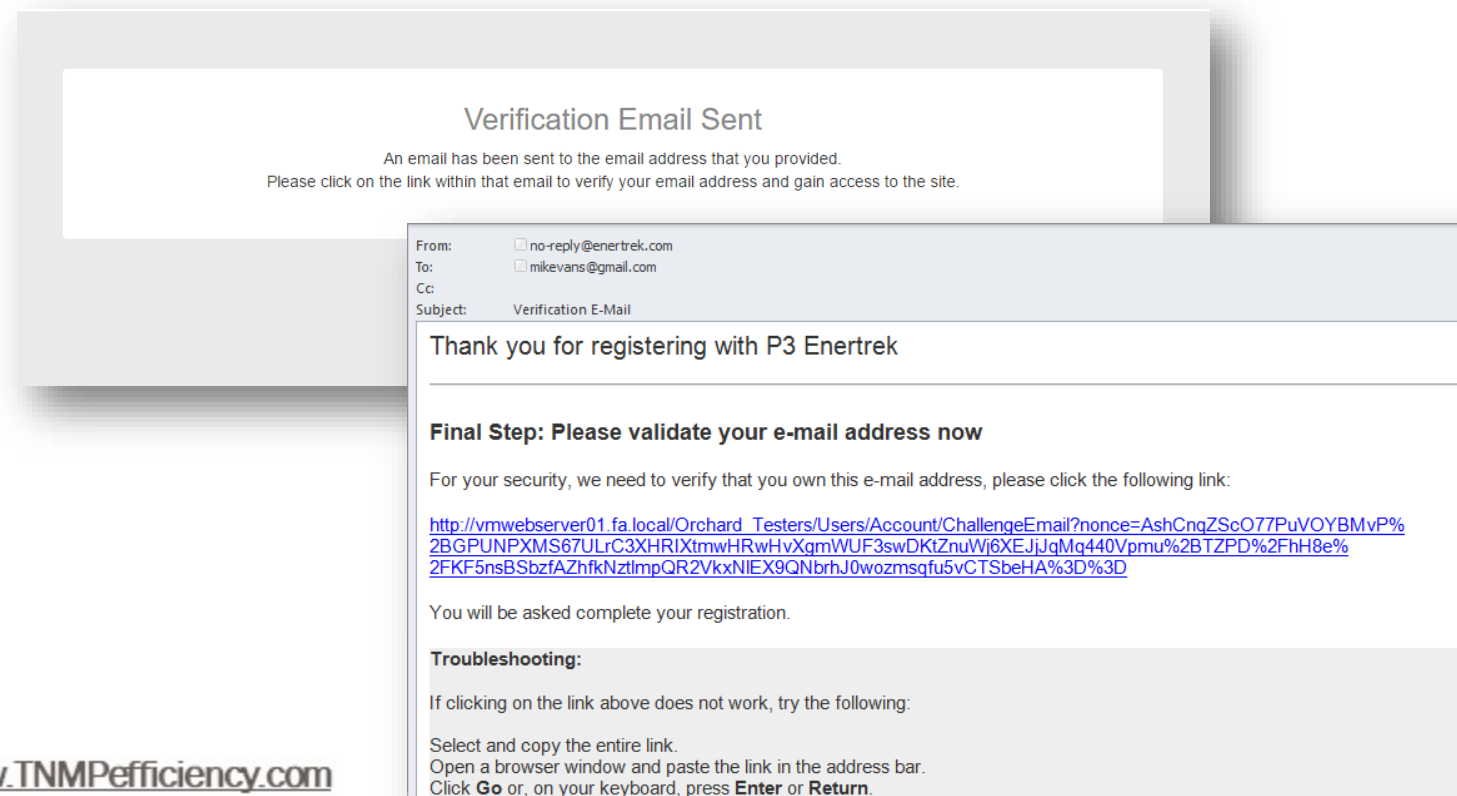
See how easy it is to use P3. Watch our Registration tutorial below to get started.



# 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

A screenshot of an email interface. At the top, the text reads "Verification Email Sent" followed by "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." Below this is a header section with the following details: From: no-reply@enertrek.com, To: mikevans@gmail.com, Cc: (empty), Subject: Verification E-Mail. The main body of the email starts with "Thank you for registering with P3 Enertrek" and a horizontal separator line. Below the line, it says "Final Step: Please validate your e-mail address now". This is followed by a security notice: "For your security, we need to verify that you own this e-mail address, please click the following link:". A blue hyperlink is provided: [http://vmwebservice01\\_fa.local/Orchard\\_Testers/Users/Account/ChallengeEmail?nonce=AshCnqZScO77PuVOYBMvP%2BGPUNPXMS67ULrC3XHRIXtmwHRwHvXgmWUF3swDKtZnuWj6XEJjJqMq440Vpmu%2BTZPD%2FhH8e%2FKF5nsBSbzfAZhfkNztlmpQR2V/kxNIEX9QNbrhJ0wozmsqfu5vCTSbeHA%3D%3D](http://vmwebservice01_fa.local/Orchard_Testers/Users/Account/ChallengeEmail?nonce=AshCnqZScO77PuVOYBMvP%2BGPUNPXMS67ULrC3XHRIXtmwHRwHvXgmWUF3swDKtZnuWj6XEJjJqMq440Vpmu%2BTZPD%2FhH8e%2FKF5nsBSbzfAZhfkNztlmpQR2V/kxNIEX9QNbrhJ0wozmsqfu5vCTSbeHA%3D%3D). The email continues with "You will be asked complete your registration." and a "Troubleshooting:" section. The troubleshooting text states: "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

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



# P3 User Profile Set-Up



## Complete Market Actor Profile

Verify Tax ID >

### Verify Tax ID

Profile Form >

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

Submit Profile >

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 \*

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 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

A yellow graphic element consisting of a plug-like shape on the left, connected to a horizontal line that extends across the top of the slide.

# 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

The screenshot shows the user interface of the P3 Enrollment Application. At the top, there is a navigation bar with four main menu items: HOME (house icon), DASHBOARD (gauge icon), PROGRAMS (target icon), and PROJECTS (clipboard icon). The user's email address, mikevans@gmail.com, is displayed on the right side of the navigation bar. Below the navigation bar, a dropdown menu is open under the PROGRAMS icon, showing two options: "Program List" and "Enrollments". A blue arrow points to the "Enrollments" option. The main content area is divided into several sections: "Quick Tasks" on the left, which includes "Review New Projects" (document icon) and "View Project Calendar" (calendar icon); "Upcoming Work Schedule" on the right, which is currently empty; and "Active Programs" and "Activity Feed" at the bottom. A "View Project Calendar" link is visible in the bottom right corner of the main content area.

# P3 Enrollment Application



★ Select the + New Enrollment button in blue

The screenshot shows the user interface of the P3 Enrollment Application. At the top, there is a navigation bar with icons for HOME, DASHBOARD, PROGRAMS, and PROJECTS. The user's email address, mikevans@gmail.com, is displayed on the right. Below the navigation bar, there are tabs for PROGRAM LIST and ENROLLMENTS. The main content area is titled "Enrollments" and features a prominent blue button labeled "+ New Enrollment" with a white plus sign. A blue arrow points to this button. To the right of the button are three buttons for "Print", "Excel", and "CSV". Below these is a "Show 10 entries" dropdown menu. A table titled "Program Enrollments" is shown with columns for ID, Program, Status, Created, Submitted, Approval Amount, and Submitted Amount. The table is currently empty, displaying "No data available in table". At the bottom left, it says "Showing 0 to 0 of 0 entries", and at the bottom right, there are "Previous" and "Next" navigation buttons.

# 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

A screenshot of a web application interface for P3 Enrollments. The main page is dimmed, showing a 'New Enrollment' button, a search bar, and a table with columns for ID, Program, and Submitted. A modal window titled 'New Enrollment' is open in the center. It contains a 'Select Program' dropdown menu with three options: '- Select -', '- Select -', 'Residential Standard Offer Program', and 'Residential Hard-to-Reach Program'. The second '- Select -' option is highlighted in blue. Below the dropdown are 'Cancel' and 'Submit' buttons. The background page shows 'Showing 0 to 0 of 0 entries' and '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 shows a web application interface for managing enrollment applications. At the top, there is a navigation bar with icons for HOME, DASHBOARD, PROGRAMS, and PROJECTS, along with a user profile dropdown for "mikevans@gmail.com". Below this is a secondary navigation bar with "PROGRAM LIST" and "ENROLLMENTS" tabs. The main content area is titled "Enrollment Details" and is split into two columns. The left column displays details for the "Residential Standard Offer Program", including enrollment ID, submission start time, creation date, and current status (Created). The right column displays "Market Actor Information Summary" for Evans HVAC, including company name, contact name, phone number, and physical address. A "View Company Profile" link is provided at the bottom right of the summary. Below the details section is an "Enrollment Form" section, and at the very bottom is the "Enrollment Application" section.

HOME DASHBOARD PROGRAMS PROJECTS mikevans@gmail.com

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? (If unsure, please refer to the PUCT definition of affiliated firms) \*

- Yes  
 No

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

## Insurance Acknowledgement

I acknowledge that my Certificate of Insurance must be sent directly to the Program Administrator by my insurance company agency with TNMP and Frontier Energy 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 Pre-Approved, Approved or Denied, the status will be updated on this table and an email will be sent to you

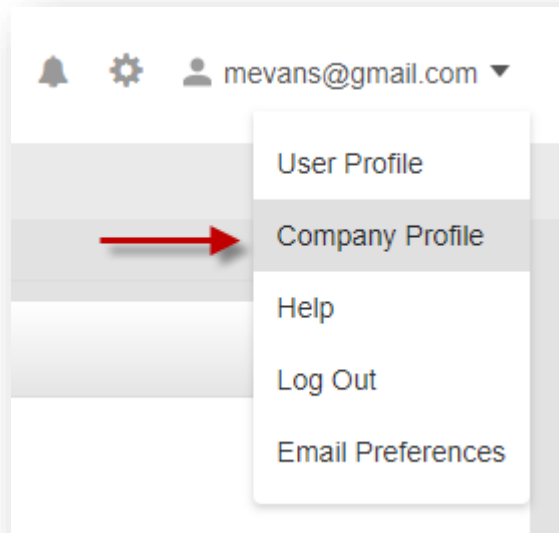
The screenshot shows a web application interface for managing enrollment applications. At the top, there is a navigation bar with icons and labels for HOME, DASHBOARD, PROGRAMS (which is the active page), and PROJECTS. A user profile for "mikevans@gmail.com" is visible in the top right. A green notification banner states "Your enrollment has been submitted". Below this, the "Enrollments" section features a "+ New Enrollment" button and a "Show 10 entries" dropdown. On the right, there are buttons for "Print", "Excel", and "CSV". The main content is a table titled "Program Enrollments" with columns for ID, Program, Status, Created, Submitted, Approval Amount, and Submitted Amount. A single entry is shown with ID 20058, Program Residential Standard Offer Program, Status Submitted, and Submitted Amount \$0.00. At the bottom, it says "Showing 1 to 1 of 1 entries" and includes "Previous", "1", and "Next" navigation buttons.

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

# 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

The screenshot displays the ENERTREK web application interface. At the top left is the ENERTREK logo. The top right navigation bar includes icons for HOME, DASHBOARD, PROGRAMS, and PROJECTS. The main content area is titled 'Evans HVAC Company Profile'. On the left, a sidebar menu lists 'Company Information', 'Uploaded Files' (highlighted with a red arrow), 'Company Users', and 'Emails'. The main panel shows the 'UPLOADED FILES' section with a blue '+ Add File' button. Below the button is a table with columns for ID, Title, Document Type, and Comment. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'.

# P3 Required Company Documents



The File Upload modal will appear

A screenshot of a web application's "File Upload" modal window. The modal has a white background and a grey border. At the top left, it says "File Upload" with a close button (an 'x' in a square) at the top right. Below the title, there is a text input field labeled "File Title". A red arrow points to this field from the right. Below the text field is a dropdown menu labeled "Document Type". The dropdown is open, showing a list of document types: "Enrollment Agreement Signature Page", "Company License", "Certification", "Insurance Certificate" (which is highlighted in blue and has a mouse cursor over it), "Procedures", "Qualifications", "Subcontractor List", "Affiliated Firms List", "Employee License or ID", "Marketing Materials", and "W9". At the bottom right of the modal is a blue button labeled "Upload" 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  
Program Manager  
Frontier Energy

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

737-236-0246



**PROGRAM PORTFOLIO PORTAL**

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

# 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)
- ★ Great PUC Resource- <http://www.powertosavetexas.net/>
- ★ Downloads:
  - ★ SOP Agreement
  - ★ Program Manual
  - ★ P3 Training Videos
  - ★ Host Customer Agreement
  - ★ Customer Acknowledgement and Certificate
  - ★ Income Eligibility Forms (single and multifamily)
  - ★ Field Data Sheet (optional)
  - ★ Service Territory
  - ★ Deemed Savings Engine Portal
  - ★ Vendor Profile Form
  - ★ Measure Documentation Guide



A yellow lightbulb icon is positioned at the top left of the slide, with a horizontal yellow line extending from its base across the top of the page.

# Questions and Answers

Use the webinar toolbar to ask questions  
Or email [morgan.nielsen@tnmp.com](mailto:morgan.nielsen@tnmp.com) anytime today  
We'll plan to respond to all questions, and send a copy of  
the presentation, via email tomorrow