



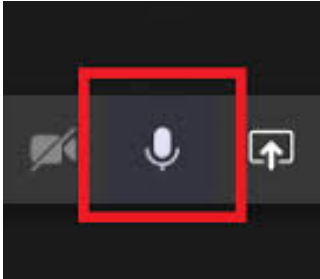
## **SMART Source<sup>SM</sup> Solar PV Program**

### **2022 Kickoff – Part 2**

**Tuesday, January 18, 11 a.m. Central**  
**Please keep your line muted!**



# Housekeeping



Please keep your line muted



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



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

# Agenda

## **In December we covered:**

- 2021 Successes and Challenges
- Key updates in 2022
- 2022 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

# 2022 Programs Overview

## 2022 Budgets

- Residential - \$572,790 total (\$385,024 Central, \$187,766 North)
- Commercial - \$245,280 total (\$174,157 Central, \$71,123 North)

## 2022 Incentive Levels

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

# 2022 - Key Updates

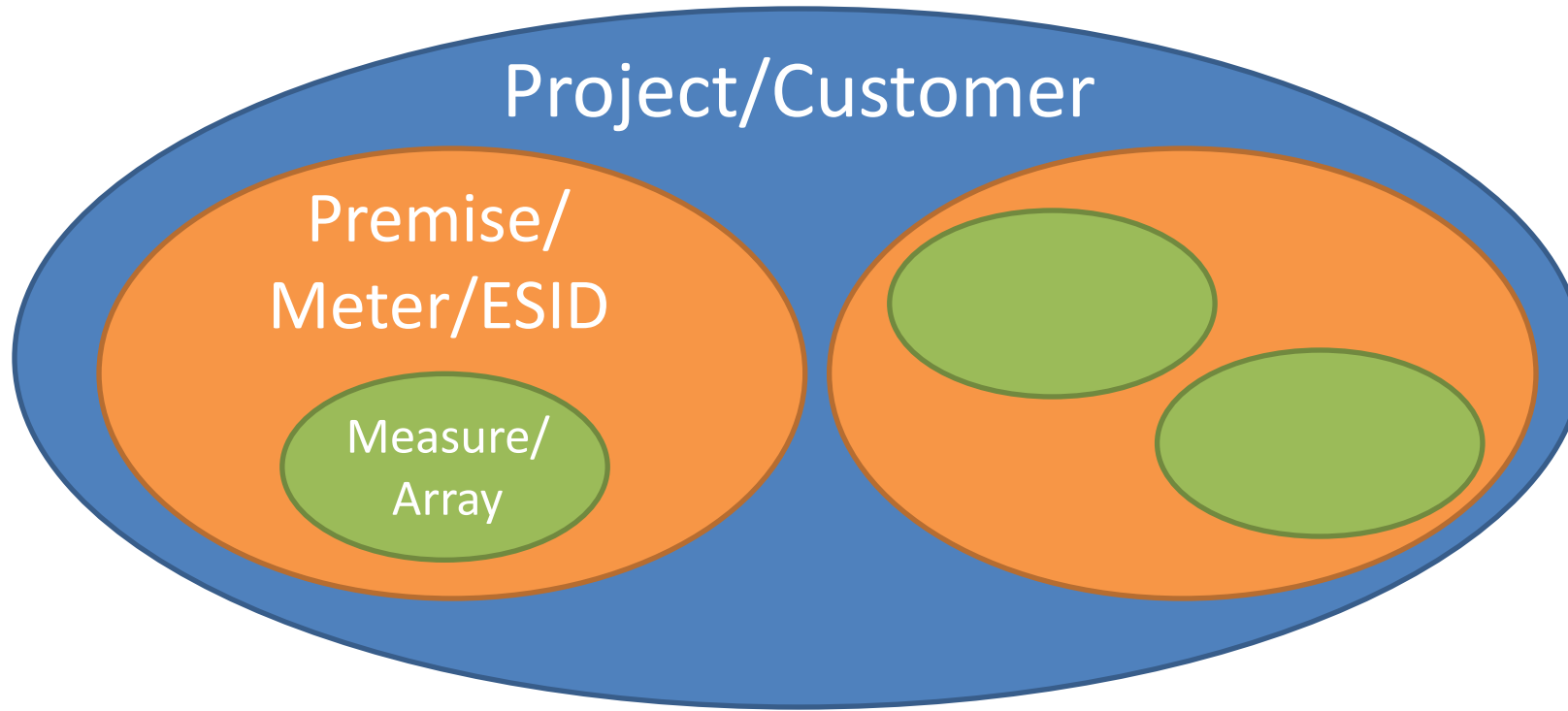
- Residential budgets nearly doubled
- Incentive levels remain the same
- All four programs will be available under one login - <https://aeptexas.p3.enertrek.com>
  - but still 4 separate programs (central and north, residential and commercial)
- No need for PVWatts uploads (P3 will calculate and document the calculation automatically)
- Support for north-tilted arrays



PROGRAM PORTFOLIO PORTAL

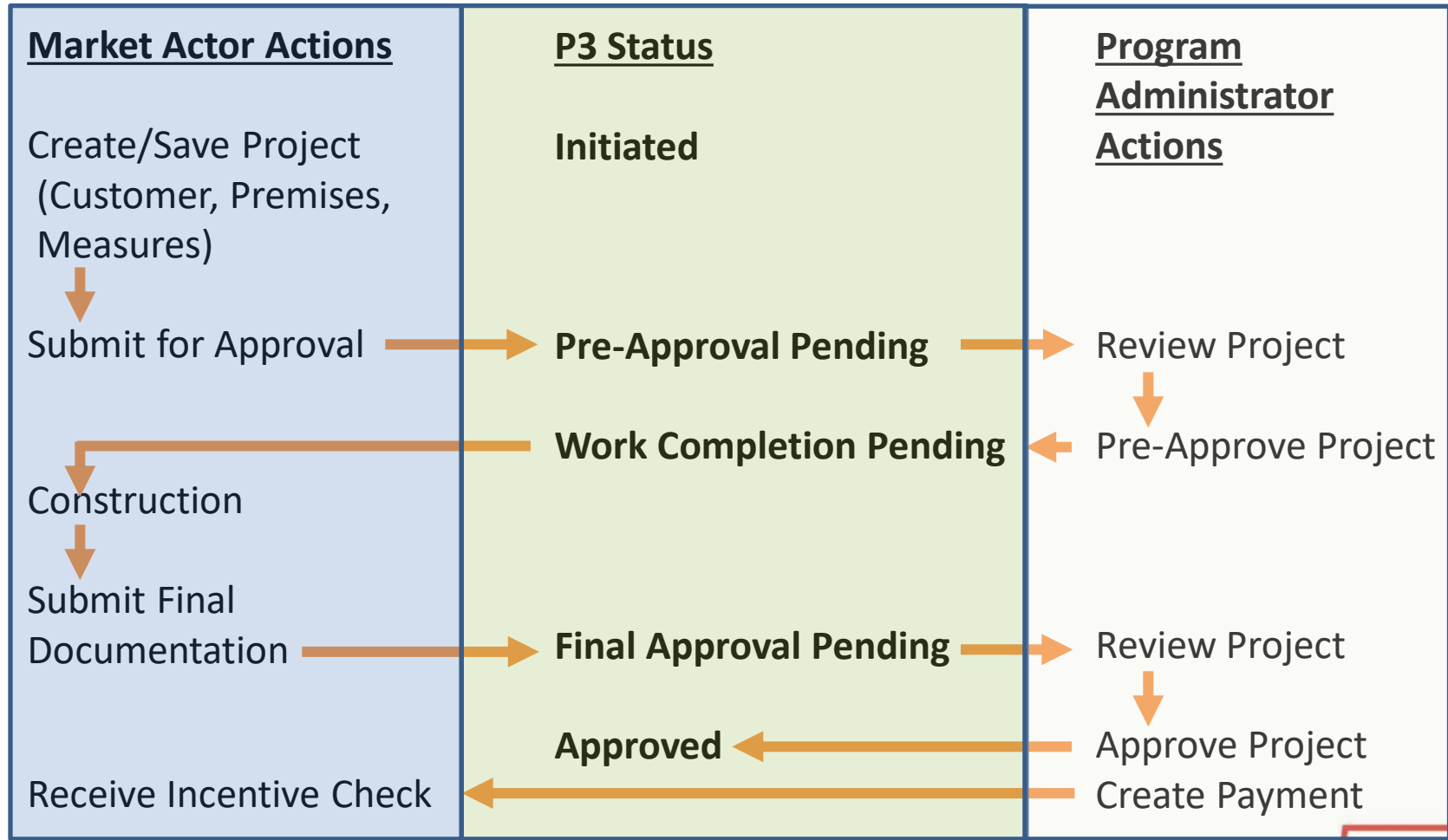


# P3 Conceptual Hierarchy



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

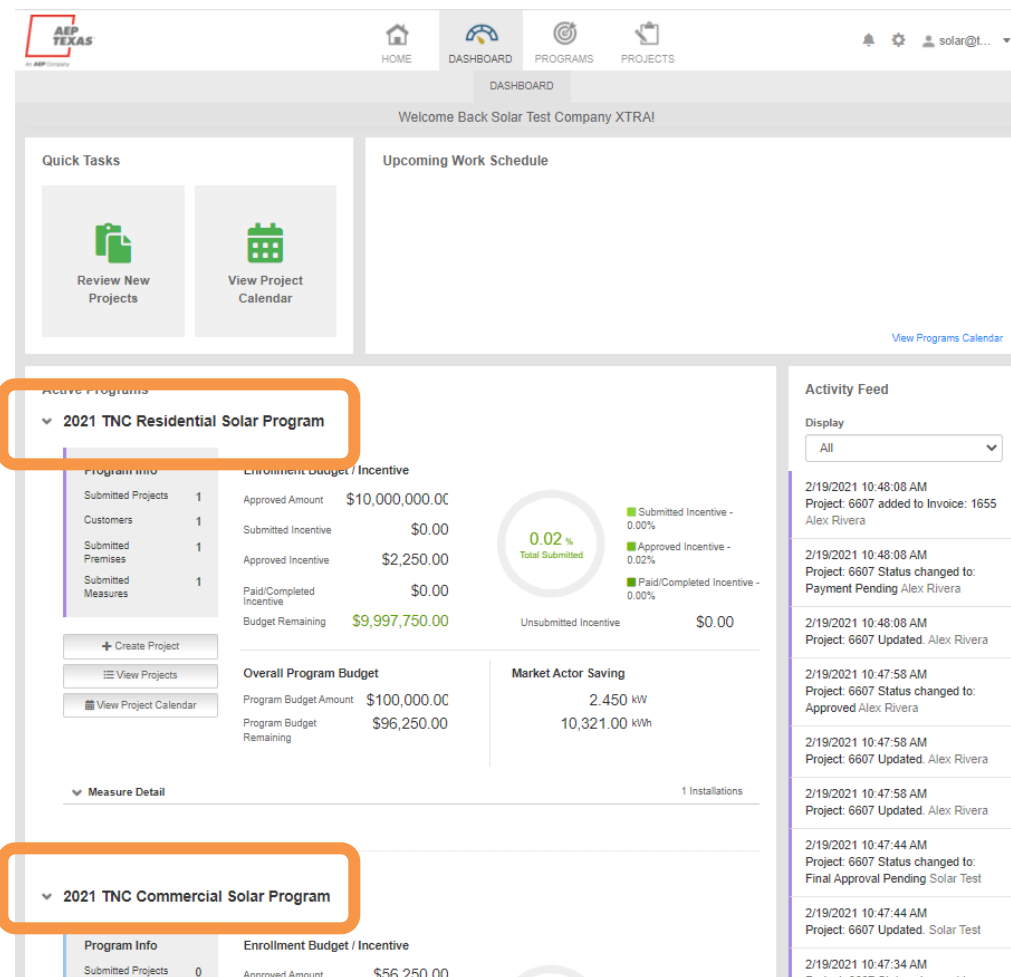
# P3 Project Flow



# Log in to P3

- Log in to program
  - <https://aep texas.p3.enertrek.com>
  - Once logged in, verify you can see res/comm programs

Contact us if you are  
unable to login to P3, 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**.

## New Project

Select Program \*

- Select -

- Select -

2021 TNC Residential Solar Program

2021 TNC Commercial Solar Program

Close Submit

## 2021 TNC Residential Solar Program

Program Info		Enrollment Budget / Incentive	
Submitted Projects	1	Approved Amount	\$10,000
Customers	1	Submitted Incentive	
Submitted Premises	1	Approved Incentive	\$
Submitted Measures	1	Paid/Completed Incentive	
		Budget Remaining	\$9,900

**+ Create Project**

**View Projects**

**View Project Calendar**

**Overall Program Budget**

Program Budget Amount \$10,000

Program Budget \$0

**AEP TEXAS**  
An AEP Company

HOME DASHBOARD PROGRAMS PROJECTS

PROJECT LIST

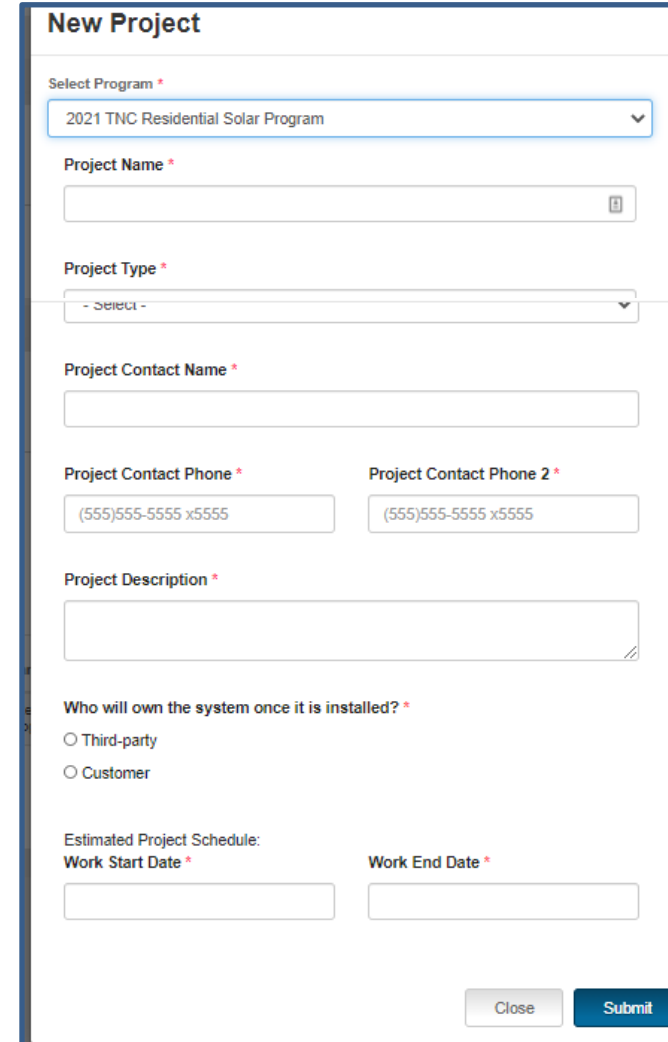
**+ New Project**

Batch Actions

Go

# 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 navigation bar with 'HOME', 'DASHBOARD', 'PROGRAMS', and 'PROJECTS'. The 'PROJECT LIST' tab is active. The 'Project Details' section shows 'Incentive / Savings' with 'Total Incentive' at \$0 and 'Total Savings' at 0.000 kW and 0.00 kWh. The 'Customers' box is highlighted with a red border, and the 'Add Customer' button is circled in orange. 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', 'Customer Contact: Last Name', 'Mailing Address', 'Address 1', and '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 list below the modal.

# 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 summary 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 form contains the following fields:

- Lookup** button
- Rate Code** (text input)
- Address 1 \*** (text input)
- Address 2** (text input)
- City \*** (text input), **State \*** (dropdown menu), **Zip \*** (text input)
- County \*** (dropdown menu)
- Annual kWh consumed** (text input) with radio buttons for **estimated** and **actual (from bills)**
- Is there an existing PV system at this site? \*** (dropdown menu)
- Existing capacity (kWdc to 3 decimal places)** (text input)
- Cancel** and **Submit** buttons

# Add Measure Details

- Go back to [Show Premise](#)

- Select [Add Measure](#)

or

The screenshot shows a web interface for adding a measure to a premise. At the top, there's a header 'im | 2021'. Below it, there are two main sections: 'Premises' and 'Market Actor'. The 'Premises' section shows a list of premises with details like '104049798054160', '30 PULLIAM ST', and 'SAN ANGELO, TX 76905'. A blue button labeled 'Show Premise' is highlighted with an orange box. The 'Market Actor' section shows details for 'Solar Test Company XTRA' with a blue button labeled 'Show Market Actor'. To the right, there's an 'Initiated' section with a dropdown menu set to '- Select -' and a blue 'Submit' button. Below these sections is a 'Measures' section with a blue button labeled '+ Add Measure' highlighted with an orange box. At the bottom, there's a 'Premise Information' section with details like 'Company: Solar Co', 'Customer: Joe Solar', 'Premise No.: 10204049798054160', 'Meter No.: 0586480446', 'Address: 2530 PULLIAM ST SAN ANGELO, TX 76905', 'County: TOM GREEN', and 'Incentive: \$0.00'. To the right of this section, there's a 'Savings' section showing '0.000 kW' and '0.00 kWh'. At the very bottom, there's a large blue button with a white plus sign and the text 'A measure has not been added to this premise yet. Select here to add a measure.' This button is also highlighted with an orange box. Orange arrows point from the 'Show Premise' and '+ Add Measure' buttons to the 'or' text, and from the 'or' text to the large blue button at the bottom.

im | 2021

Premises 1

104049798054160  
30 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

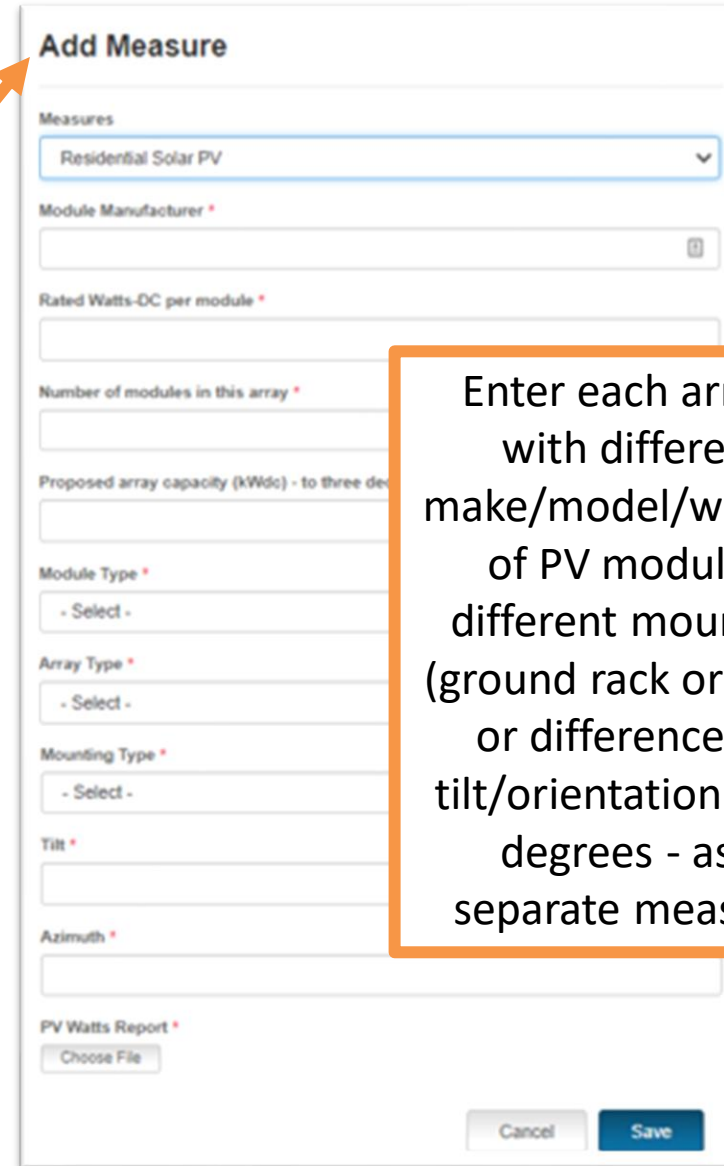
▼ Premise Information ⚙

Company:	Solar Co	Savings	
Customer:	Joe Solar		0.000 kW
Premise No.:	10204049798054160		0.00 kWh
Meter No.:	0586480446		
Address:	2530 PULLIAM ST SAN ANGELO, TX 76905		
County:	TOM GREEN		
Incentive:	\$0.00		

+  
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**
  - 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-based 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:** A dropdown menu with "Residential Solar PV" selected.
- Module Manufacturer:** A text input field.
- Rated Watts-DC per module:** A text input field.
- Number of modules in this array:** A text input field.
- Proposed array capacity (kWdc):** A text input field.
- Module Type:** A dropdown menu with "- Select -" selected.
- Array Type:** A dropdown menu with "- Select -" selected.
- Mounting Type:** A dropdown menu with "- Select -" selected.
- Tilt:** A text input field.
- Azimuth:** A text input field.
- PV Watts Report:** A "Choose File" button.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

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




Tilt \*  
22

Azimuth \*  
|

Azimuth is required

Premium module manufacturer's specification sheet (required for Premium module types)

 export (9).xml

# 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)

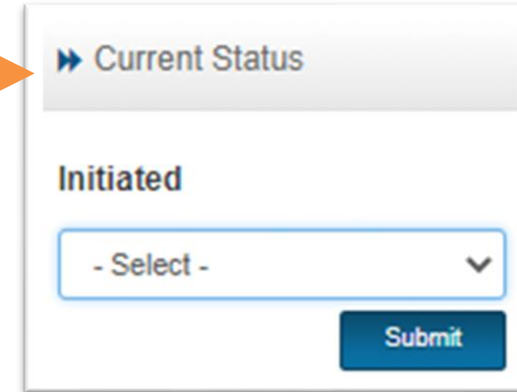
Browse

Cancel Save



# Submit

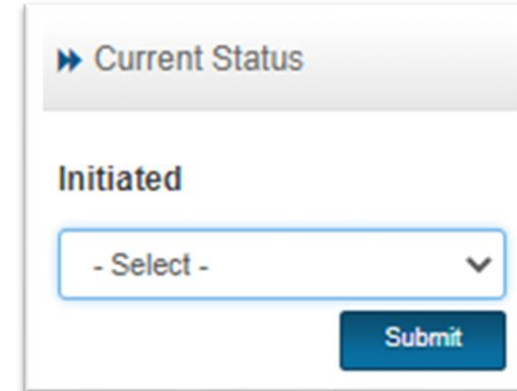
- Submit the project using the Current Status indicator
- After you submit the project, it will move into Pre-Approval Pending status
  - Please allow 1-2 weeks for us to review these initial submittals
  - We will let you know if any additional information is required before we can approve it
- Repeat 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 double arrow icon. 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 labeled 'Submit'.

# 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

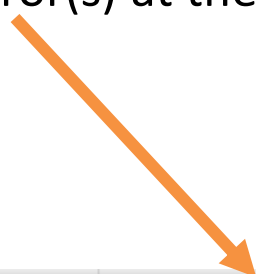


▶ Current Status

Initiated

- Select -

Submit



Residential Solar PV	R-SolarPV	1	<b>Error</b> Premise Rate Code does not qualify for this program.	3499.83
Residential Solar PV	R-SolarPV	1	<b>Error</b> This project is missing required file: Copy of recent customer electric bill	3499.83
Residential Solar PV	R-SolarPV	1	<b>Error</b> This project is missing required file: Copy of signed customer contract	3500.34
			<b>Error</b> 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 bar is labeled 'Search:' and the filter and sort buttons are labeled 'Filter' and 'Sort' respectively. The table below shows the project list with columns for 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	2/18/2021	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.:	10204049798054160		
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	<span>⌵</span> History <span>✎</span> Edit <span>🗑️</span> 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)

# 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 \$100,000 of residential program budgets, and \$56,250 of North commercial and \$112,500 of Central program budgets.
  - We will track and enforce these limits on our end. Limits expire July 1, 2022.
- 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
<a href="#">+ Create Project</a>		Budget Remaining	\$39,500.00

- **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



## [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](#)

## Welcome to the SMART Source<sup>SM</sup> Solar PV Program

The SMART Source Solar PV Program is designed to help customers of AEP Texas meet a portion of their energy needs with solar electric systems. The Program offers financial incentives that help offset the initial cost of installing a solar energy system. By installing solar on your home or business, you can generate a portion of your own electricity and help the environment.

**NOTICE:** Only solar installation companies that are registered with the program can apply for and receive incentives, and any installation work must begin after an incentive commitment has been made. Unregistered installers, or installers who claim that you will be able to apply for an incentive after the installation is complete, may be engaging in fraud, and you will not be able to receive an incentive if you work with them. Please see our list of registered installers [here](#).



# Help/Questions

- Always start with  
**Rob Lovenguth**  
[rlovenguth@frontierenergy.com](mailto:rlovenguth@frontierenergy.com)  
737-443-7841
- Deeper dives:
  - P3 user questions: Tracie Cooper, [tcooper@frontierenergy.com](mailto:tcooper@frontierenergy.com), 737-236-0246
  - Program design questions: Steve Wiese, [swiese@frontierenergy.com](mailto:swiese@frontierenergy.com), 737-236-0255
  - AEP questions, Melissa Proske, [maproske@aep.com](mailto:maproske@aep.com)
  - AEP interconnection questions, Rosalba Epps, [raepps@aep.com](mailto:raepps@aep.com)

# Thank You!

