



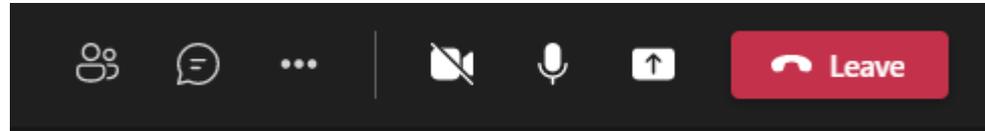
SMART SourceSM Solar PV Program

2024 Enrollment Kickoff

December 13, 2023 Central

**Use computer audio, or if that doesn't work, call in
1 469-206-8468 Conference ID: 536 831 022#**

Housekeeping



To ask a question,
use the text
messaging in
Teams (your
messages will be
viewable by all
participants)



Please
keep
your
line
muted



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

What we'll cover:

- Introduce key contacts
- 2023 Successes and Challenges
- 2024 Program Overview
 - Utility service areas
 - Service provider/customer eligibility
 - Program budgets, incentive levels, limits
 - Pilot programs
- Submitting your Enrollment Application on P3
- Seeking Your Input
- Contact and Questions

After all Enrollments are complete, we'll schedule a second webinar in early January to walk you through how to enter projects in the database

2023 Successes and Challenges

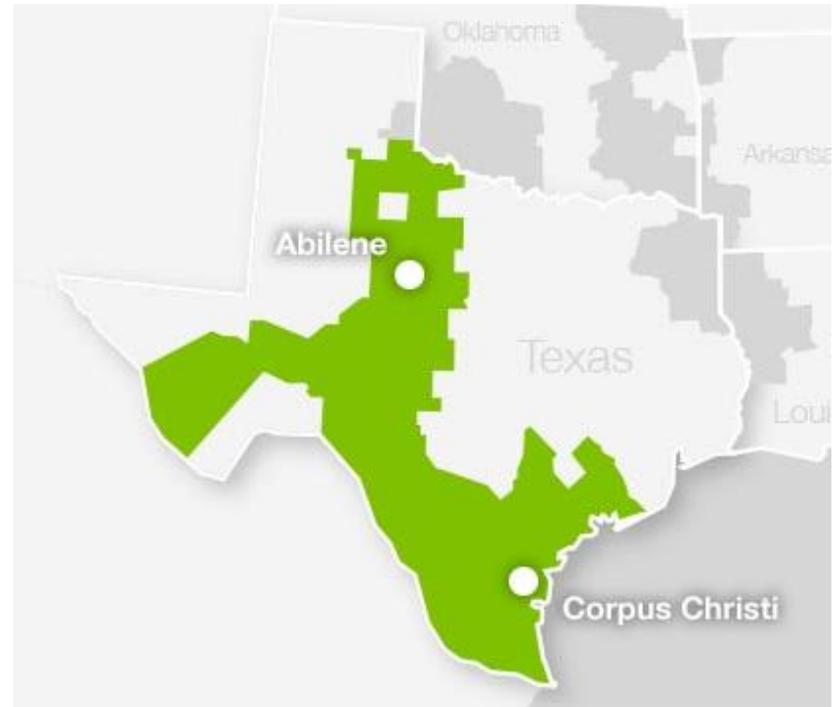
- Successes
 - Central Residential:
 - 121 projects
 - 610.903 kW
 - 2,284,624.32 kWh
 - North Residential:
 - 43 projects
 - 261.829 kW
 - 891,447.97 kWh
- Challenges
 - End of the year project submittals.
 - Project cancellations.

2024 Programs Overview



2024 – Program Overview

- 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
- **Complete your enrollment by**



PROGRAM PORTFOLIO PORTAL

2024 Programs Overview

AEP Texas Service Area

- Single service area (but still operate as if there are separate budgets/programs for Central and North)
- Melissa Proske is the Program Manager, maproske@aep.com
- **Frontier Energy**
- Administers the Program(s) for AEP Texas
- Key contacts are:
 - Rob Lovenguth, rlovenguth@frontierenergy.com
 - Tracie Cooper, tcooper@frontierenergy.com
 - Steve Wiese, swiese@frontierenergy.com



2024 Programs Overview

Market Actor eligibility

- Insurance and W9:
 - GL insurance with minimum limits of \$500k per occurrence and \$500k general aggregate; BI/PD \$500k general aggregate, should name Frontier Energy as additional insured
- Must agree
 - To comply with all program requirements
 - That only licensed electrical contractors and licensed electricians will offer, perform and permit all associated electrical work
- Minimum Qualification
 - TECL + NABCEP Certified Installer, or
 - TECL + qualified to sit for NABCEP Certified Installer exam, or
 - TECL + 40 hours solar training (min)



2024 Programs Overview

Customer eligibility

- Served by AEP Texas at the distribution level
- First 9 digits of ESI ID on electric bill identify the distribution utility
 - 100327894 or 102040497
- Residential or commercial determined by rate class at meter
- P3 will allow ESI ID lookup to assist with data entry and eligibility determination

AEP Texas

100327894 **01234567**
Company code Premise ID#

or

102040497 **01234567**
Company code Premise ID#

2024 Programs Overview

2024 Budgets

- Residential - \$567,093 total (\$381,195 Central, \$185,898 North)
- Commercial - \$242,791 total (\$172,425 Central, \$70,366 North)

2024 Incentive Levels

- Residential - fixed incentive structure
 - 3-4.999 kWdc = \$1,500
 - 5-7.499 kWdc = \$2,250
 - 7.5+ kWdc = \$3,000
- 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

2024 Programs Overview

Project Size Limits

- Estimated annual energy production from all generation sources must be $<$ or $=$ estimated annual energy consumption

Incentive Limits

- Maximum incentive per project/per customer
- \$3,000 residential
 - \$56,250 non-residential (incentives up to 200 kWdc)
- Per service provider/project owner
 - Residential: \$100k Central / \$100k North
 - Commercial: \$112,500 Central / \$56,250 North
- Open Season – limits removed July 1, 2024 if funding has not been claimed

2024 Programs Overview

Problem

- Large commercial projects soak up budget but are not completed on time or during the program year
- This prevents us from knowing about other potentially viable commercial projects that could receive funding

2023 Solution

- Switch commercial projects from current pre-approval → construction → final approval process to new process where the project is submitted only after construction is complete.
- Require strict adherence to meeting project milestones and/or completion deadline (i.e., 120 days from approval)

2024 Programs Overview

New Opportunities

- We have been working on two pilot program options this year
 - An energy storage pilot
 - A low income solar pilot
- If you are interested in participating in either of these pilot programs, please let Rob know and we will provide more information and solicit your input

Program Websites

- **Existing program website**
 - <http://www.txreincentives.com/>
 - Public information, announcements
 - Program guidebook (when available)
- **P3**
 - <https://aeptexas.p3.enertrek.com>
 - Current budget and project status
 - All project data entry

2024 Tracking System

P3 – Program Portfolio Portal



PROGRAM PORTFOLIO PORTAL

aeptexas.p3.enertrek.com

P3 Registration

aeptexas.p3.enertrek.com

ENERTREK

Log In

Email address *

Password *

Remember me

Log in

[Forgot password?](#)

[Need help getting started?](#)

Log in with

Google

Facebook

or

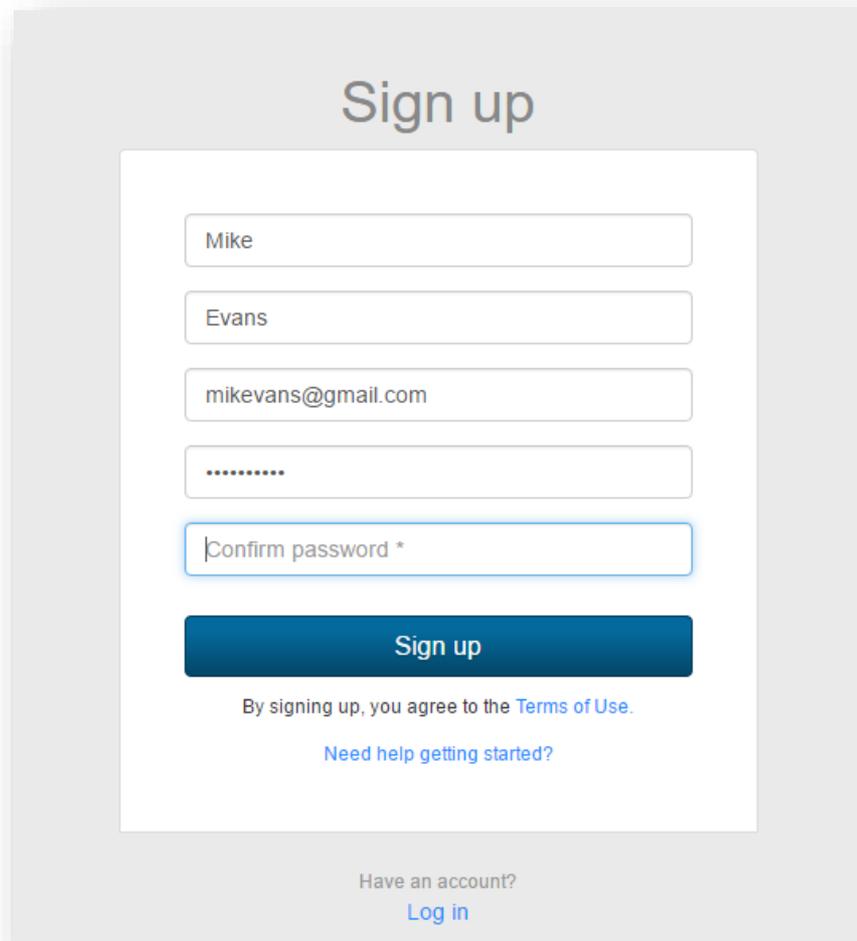
If you have not linked your Google and/or Facebook account with your P3 account, you can link from User Profile page.

Sign up now

[Create account](#)

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

P3 Registration



The screenshot shows a registration form with the following fields and elements:

- Text input field: Mike
- Text input field: Evans
- Text input field: mikevans@gmail.com
- Text input field:
- Text input field: Confirm password *
- Blue button: Sign up
- Text: By signing up, you agree to the [Terms of Use](#).
- Text: [Need help getting started?](#)
- Text: 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



Log in

 Remember me

Log in

[Forgot password?](#)

[Need help getting started?](#) ←

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

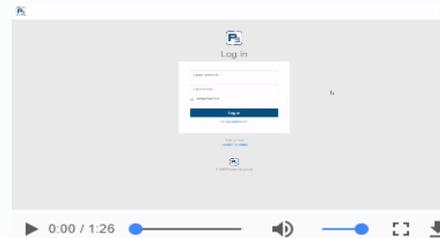
- ★ New P3 users can also access our P3 video tutorials by clicking the “Need help getting started?” link on the login page.

Getting Started with P3

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.



How to create your P3 Market Actor User Profile

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://vmwebserver01_fa.local/Orchard_Testers/Users/Account/ChallengeEmail?nonce=AshCnqZScO77PuVOYBMvP%2BGPUNPXMS67ULrC3XHRIXtmwHRwHvXgmWUF3swDKtZnuWj6XEJjJqMq440Vpmu%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 Market Actor Profile Set-Up

Complete User Profile

Select your user type

 or 

Customer

You are a residential or commercial customer that receives utility services from Enertrek.

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 Market Actor 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.**

Tax ID

Back Next

★ Users will need to provide basic company information including their Tax ID, Address, and company contact information

P3 Market Actor 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 Market Actor 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 Program Enrollment Process



P3 Enrollment Overview

- ★ Users will need to create an enrollment application for the program(s) they wish to participate in
- ★ 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 displays 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 visible in the top right corner. Below the navigation bar, a dropdown menu is open under the PROGRAMS icon, showing options for Program List and Enrollments. A blue arrow points to the Enrollments option. The main content area is divided into two sections: Quick Tasks and Upcoming Work Schedule. The Quick Tasks section contains two cards: Review New Projects and View Project Calendar. The Upcoming Work Schedule section is currently empty. At the bottom of the page, there is a footer with the Frontier Energy logo, the text 'Activity Fee', and the AEP TEXAS logo, which is noted as 'An AEP Company'.

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

FRONTIER energy

Activity Fee

AEP TEXAS
An AEP Company

P3 Enrollment Application

★ Select the + New Enrollment button in blue

HOME DASHBOARD PROGRAMS PROJECTS

mikevans@gmail.com ▼

PROGRAM LIST ENROLLMENTS

Enrollments

[+ New Enrollment](#)

Show 10 entries

Print Excel CSV

Program Enrollments

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

Showing 0 to 0 of 0 entries

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

Please note: You only need to register for the Residential solar program (we will copy your information to the Commercial solar program if you indicated that you wish to enroll in both on the enrollment form)

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 three options: "- Select -", "- Select -", and "Residential Solar PV Program". The "Residential Solar PV Program" option is highlighted in blue. Below the dropdown menu, there are "Cancel" and "Submit" buttons. The background interface shows a "New Enrollment" button, a search bar, and a table with columns for "ID", "Program", and "Submitted". The table is currently empty, displaying "No data available in table" and "Showing 0 to 0 of 0 entries".

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 P3 Enrollment. At the top, there is a navigation bar with icons for HOME, DASHBOARD, PROGRAMS, and PROJECTS, and a user profile for mikevans@gmail.com. Below the navigation bar, there are two tabs: PROGRAM LIST and ENROLLMENTS. The main content area is titled "Enrollment Details" and is divided into two columns. The left column is titled "Residential Solar Program" and displays the following information: Enrollment ID: 20058, Submission Star... 1/23/2016 12:00:00 AM, Created: 10/28/2016 (M.Evans), Submitted: (empty), and Current Status: Created (in a blue box). The right column is titled "Market Actor Information Summary" and displays the following information: Company Name: Evans HVAC, Company DBA: (empty), Contact Name: Mike Evans, Phone: (555)555-5555, and Physical Address: 123 Main Street Austin, TX 78746. A "View Company Profile" link with an external icon is located at the bottom right of the right column. Below the enrollment details, there is a section titled "Enrollment Form".

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

Program Qualifications

Applicant must demonstrate program qualifications as shown below, and must provide documentation supporting the highest listed qualification.

Applicant is a licensed Texas Electrical Contractor, and:

I employ at least one full-time regionally-based employee who is currently certified by the North American Board of Certified Energy Practitioners (NABCEP) as a PV Installer (NABCEP PV Installer certification, not the entry level certification also offered by NABCEP) and I have uploaded a copy of my NABCEP certification to my Company Profile.

or,

I employ at least one full-time regionally-based employee who has been determined by NABCEP to be eligible to sit for the NABCEP PV Installer exam (Please see www.nabcep.org for more details on eligibility requirements) and I have uploaded written notification from NABCEP of eligibility to sit for the exam to my Company Profile.

or,

I employ at least one full-time regionally-based employee who has completed at least 40 hours of PV installation training provided by a third party and I have uploaded a copy of certificate showing 40 hours of PV training to my Company Profile.

Texas Electrical License

License #: *

2547887

Expiration Date: *

12/29/2021

I have uploaded a copy of my Texas Electrical Contractor/Master Electrician license to my Company Profile *

AEP Texas Central Division Program Agreement

[2021 AEP Texas Solar PV Agreement](#)

I confirmed that I have read and agree to the Participation Agreement and uploaded a signed copy to my Company Profile *

I am interested in participating in the Commercial Solar PV program and would like to apply this enrollment to the 2021 AEP Texas Commercial Solar PV Program. *



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

HOME DASHBOARD **PROGRAMS** PROJECTS

mikevans@gmail.com

Your enrollment has been submitted

Enrollments

+ New Enrollment

Show 10 entries

Print Excel CSV

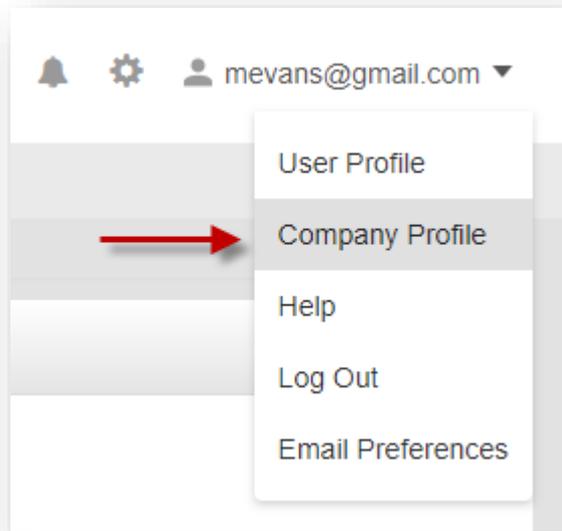
Program Enrollments

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

Showing 1 to 1 of 1 entries

P3 Required Company Documents

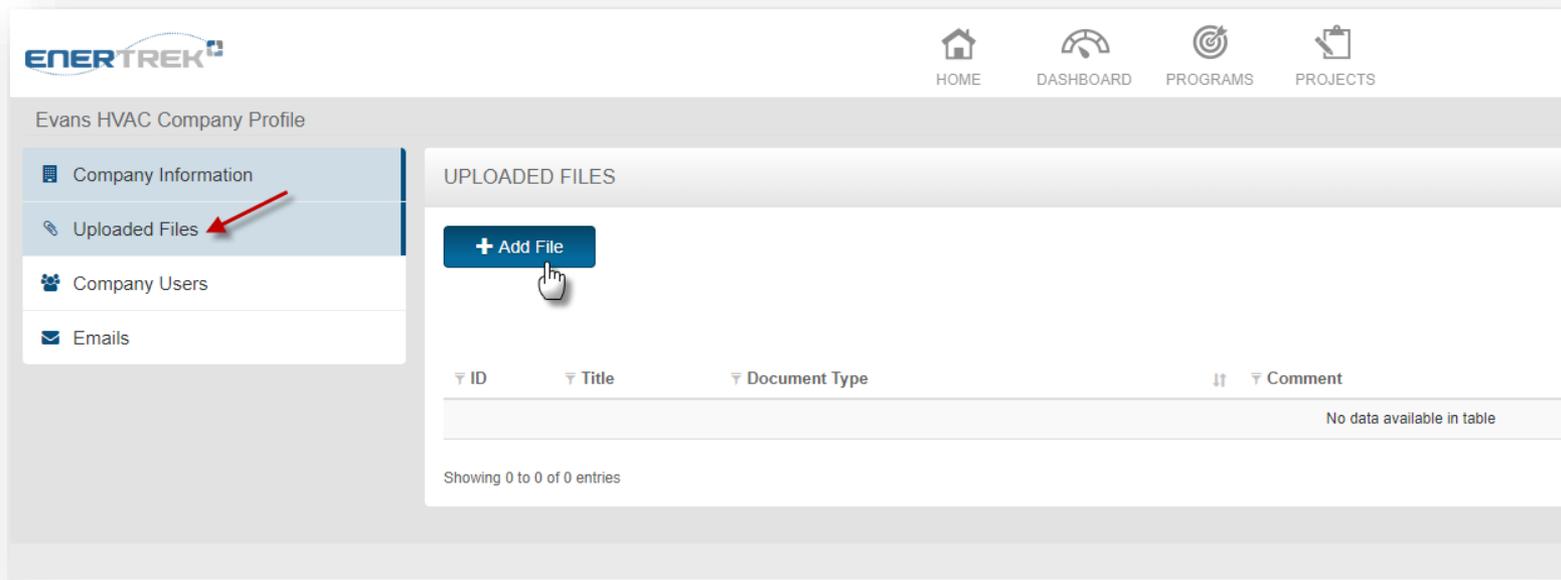
The Company Profile section is where Market Actors will upload certifications, licenses, W9s and any other required documentation relating to their Enrollment Application



- ★ 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

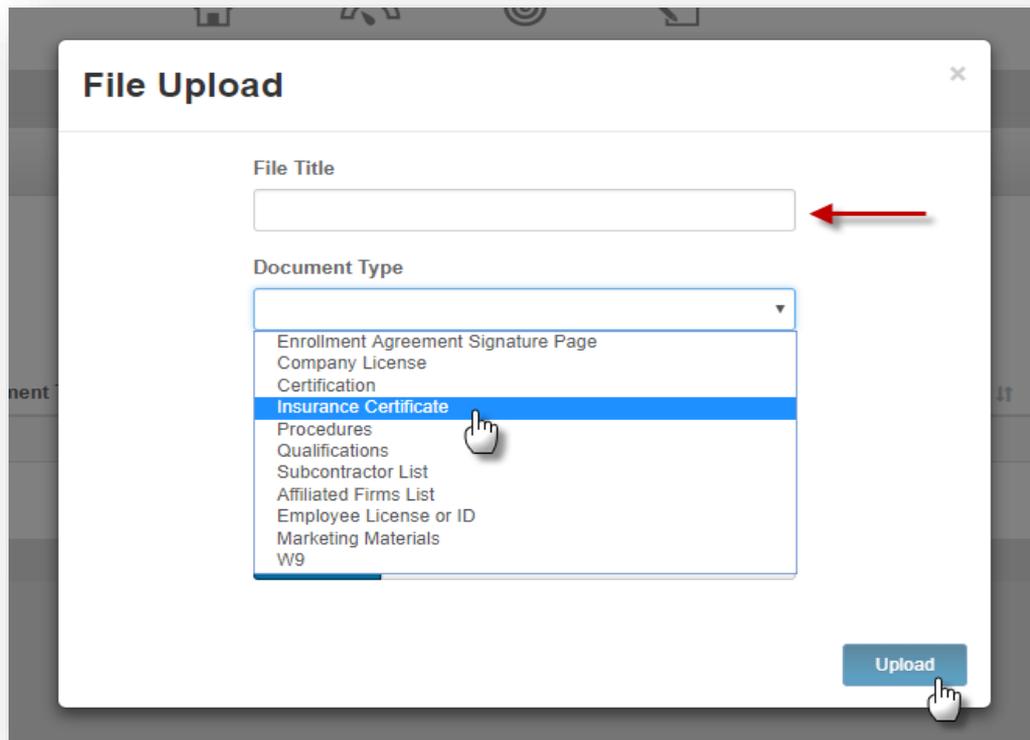


★ Five (5) files you will need to upload at the Enrollment application stage:

- ★ COI
- ★ TECL Contractors license
- ★ W9
- ★ NABCEP and/or training status
- ★ Signed copy of AEP Texas Solar PV Participation Agreement
(download is available from the Enrollment form)

P3 Required Company Documents

The File Upload modal will appear



The screenshot shows a 'File Upload' modal window. It contains a 'File Title' text input field with a red arrow pointing to it. Below it is a 'Document Type' dropdown menu with 'Insurance Certificate' selected and highlighted. A mouse cursor is pointing at the 'Insurance Certificate' option. At the bottom right of the modal is an 'Upload' button with a mouse cursor pointing at 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
Sr. EnerTrek Analyst II
Frontier Energy
tcooper@frontierenergy.com
737-236-0246



PROGRAM PORTFOLIO PORTAL



What to do next

1. **Register on P3 and complete your Market Actor profile at <https://aeptexas.p3.enertrek.com>**
 - New Participants – Sign up, email validation, set up Market Actor profile (basic company information, contacts, address, etc.), enter tax ID, remember to hit “Submit”.
 - Past Participants – Login with your username and password. Update information and documentation as needed.
 - **Apply for Enrollment in the Solar Program(s)**
 - Decide which AEP Texas regions you will / plan to / might possibly participate in (Central or North).
 - For each region, Apply for Enrollment in the Residential program only (we will automatically enroll you in the Commercial program) and submit all required documentation to your Company Profile (W9, COI, TECL, NABCEP/training, Participation Agreement).

Thank You!



Program questions: **Rob Lovenguth**, rlovenguth@frontierenergy.com, 737-443-7841

P3 user questions: **Tracie Cooper**, tcooper@frontierenergy.com, 737-236-0246

Also:

Steve Wiese, swiese@frontierenergy.com, 737-236-0255

Melissa Proske, maproske@aep.com

