



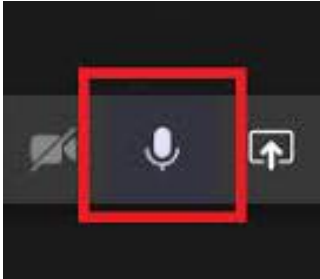
SMART SourceSM Solar PV Program

2023 Kickoff – Part 2

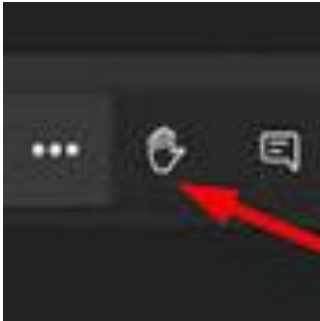
January 19th, 10:30 a.m. Central
Please keep your line muted!



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

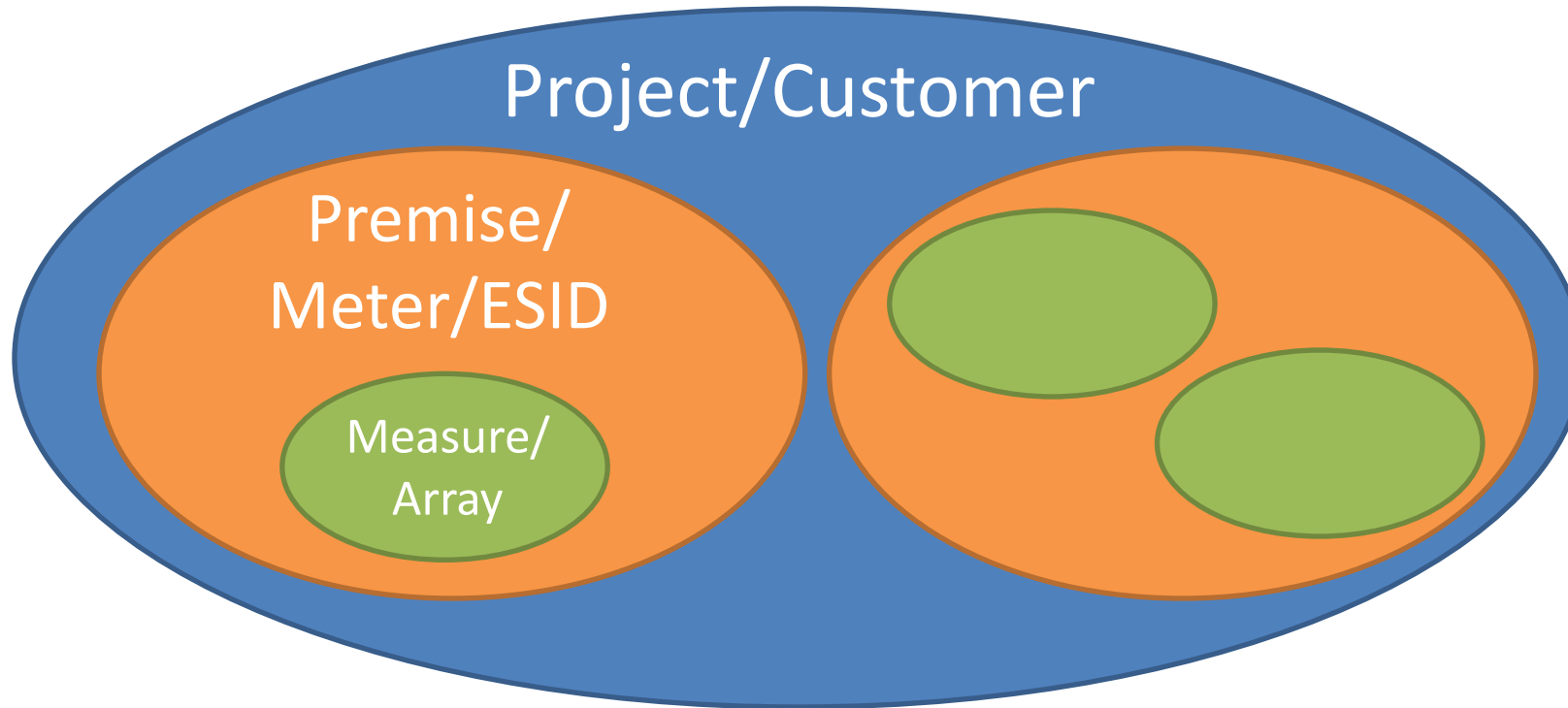
In December we covered:

- 2022 Successes and Challenges
- Key updates in 2023
- 2023 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)
- Additional Tips
- To Do List before Open
- **The programs will open for project submissions after this webinar today at 12pm.**

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.

New P3 Project Flow for Residential Projects

Residential Projects – New 1-Step Process

- Construction complete
- Local green tag (if needed)
- Interconnection agreement completed
- Permission to operate obtained

Create and Submit Project in P3

Frontier Reviews and Approves
Frontier Pays Incentive



Commercial Projects – Same 3-Step Process

Create and Submit for Pre-Approval in P3

Frontier Reviews and Pre-Approves

Start and Complete Construction

- Construction complete
- Local green tag (if needed)
- Interconnection agreement completed
- Permission to operate obtained

Submit for Final Approval in P3

Frontier Reviews and Approves
Frontier Pays Incentive



New P3 Project Flow for Residential Projects

- How will this affect how we work with the program?

For residential projects,

- Market actors can claim/encumber program funds only after projects are complete and PTO obtained
- Market actors will need to watch the available budget and compete for available funds
 - Each market actor is limited to a maximum amount of funding they can apply for in each program
 - But no market actor is guaranteed funding availability up to their individual limit, as funding may be claimed by other market actors



For commercial projects, no change.

- Market actors propose projects,
- Frontier pre-approves and encumbers funds,
- Then construction begins.
- Projects are assured funding prior to start.



2023 Programs Overview

2023 Budgets

- Residential - \$569,966 total (\$383,126 Central, \$186,840 North)
- Commercial - \$244,020 total (\$173,298 Central, \$70,722 North)

2023 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*

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

The screenshot displays the AEP Texas P3 dashboard. At the top, there are navigation tabs for HOME, DASHBOARD, PROGRAMS, and PROJECTS. The user is logged in as 'solar@t...'. The dashboard shows a welcome message for 'Solar Test Company XTRA!'. Below this, there are sections for 'Quick Tasks' (Review New Projects, View Project Calendar) and 'Upcoming Work Schedule'. The main content area is divided into 'Active Programs' and 'Activity Feed'. The 'Active Programs' section highlights two programs: '2021 TNC Residential Solar Program' and '2021 TNC Commercial Solar Program'. The '2021 TNC Residential Solar Program' details include:

Program Info		Enrollment Budget / Incentive	
Submitted Projects	1	Approved Amount	\$10,000,000.00
Customers	1	Submitted Incentive	\$0.00
Submitted Premises	1	Approved Incentive	\$2,250.00
Submitted Measures	1	Paid/Completed Incentive	\$0.00
		Budget Remaining	\$9,997,750.00

Additional metrics for the Residential program include: Overall Program Budget (Program Budget Amount: \$100,000.00, Program Budget Remaining: \$96,250.00), Market Actor Saving (2,450 kW, 10,321.00 kWh), and a 'Total Submitted' gauge showing 0.02%. The 'Activity Feed' on the right shows a series of updates for Project 6607, including status changes and invoice additions.

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**.

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	\$100,000
Program Budget	\$0

HOME DASHBOARD PROGRAMS PROJECTS

PROJECT LIST

Project List

+ New Project

Batch Actions

Go

New Project

Select Program *

- Select -

- Select -

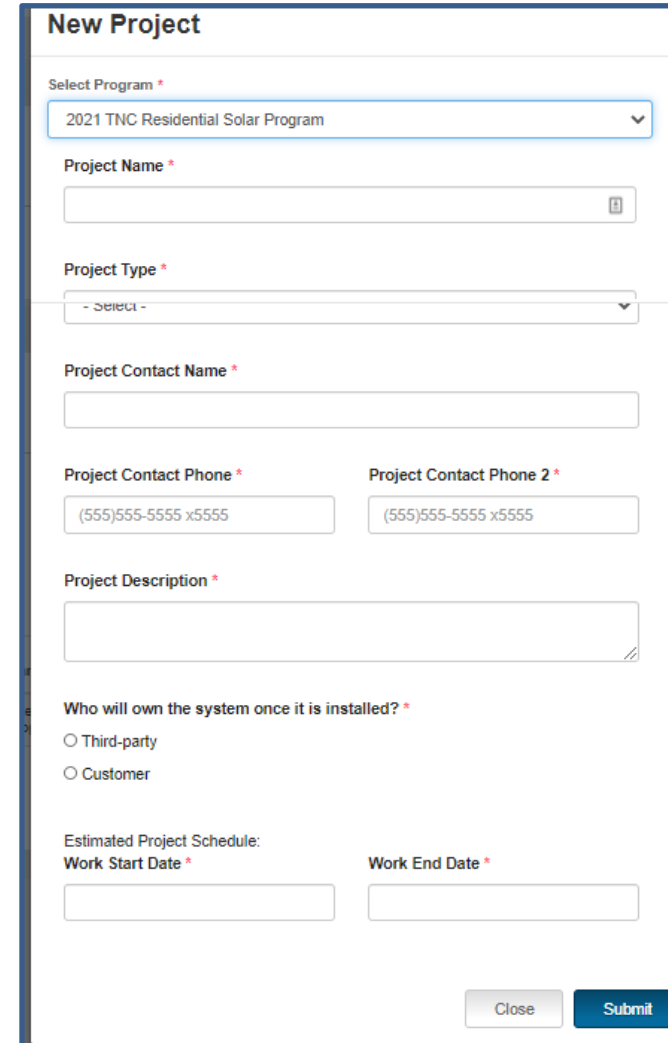
2021 TNC Residential Solar Program

2021 TNC Commercial Solar Program

Close Submit

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 with a clear button.
- Project Type ***: A dropdown menu with '- select -' selected.
- Project Contact Name ***: A text input field.
- Project Contact Phone ***: A text input field with '(555)555-5555 x5555' entered.
- Project Contact Phone 2 ***: A text input field with '(555)555-5555 x5555' entered.
- Project Description ***: A text area with a clear button.
- Who will own the system once it is installed? ***: Radio buttons for 'Third-party' and 'Customer'.
- Estimated Project Schedule:**
 - Work Start Date ***: A date input field.
 - Work End Date ***: A date input field.

At the bottom right, there are 'Close' and 'Submit' buttons.

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 main content area displays 'Project Details' with sections for 'Incentive / Savings' (Total Incentive: \$0, Total Savings: 0.000 kW, 0.00 kWh) and 'Customers' (0 customers). A red box highlights the 'Add Customer' button in the Customers section. An orange arrow points from this button to the 'Add Customer' modal. The modal contains the following fields: Email *, Phone *, Phone 2, Company Name *, Customer Contact: First Name *, Customer Contact: Last Name *, Mailing Address (Address 1 *, Address 2), and buttons for 'Cancel' and 'Submit'.

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. The 'Premises' section is highlighted with an orange box, and the 'Add Premise' modal form is overlaid on it. The modal form contains the following fields and options:

- 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**

im | 2021

Initiated

- Select -

Submit

1

1

104049798054160
30 PULLIAM ST
ANGELO, TX 78905

Show Premise

Market Actor

Solar Test Company XTRA
123 Main Street
Austin, TX 78733
(555) 555-5555
solar@test.com

Show Market Actor

Measures

+ Add Measure

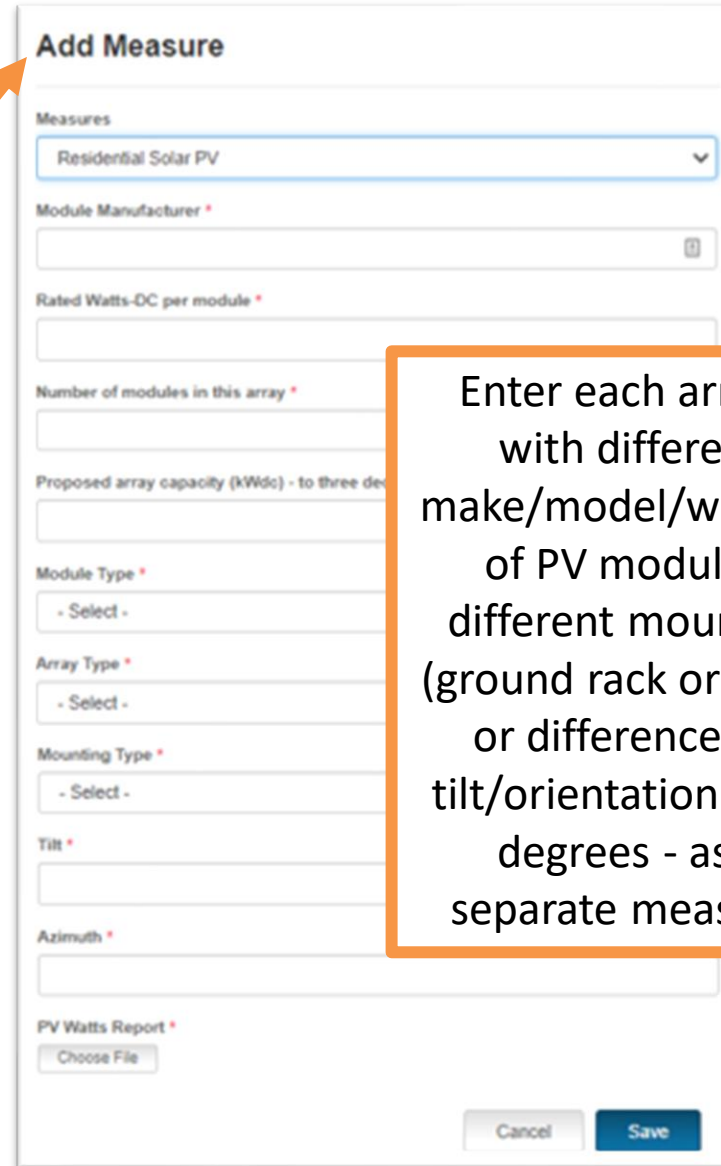
▼ Premise Information

Company:	Solar Co	Savings	
Customer:	Joe Solar		0.000 kW
Premise No.:	10204049798054160		0.00 kWh
Meter No.:	0588480448		
Address:	2530 PULLIAM ST SAN ANGELO, TX 78905		
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 form titled "Add Measure". The form contains several fields: "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) - to three de" (a text input field), "Module Type" (a dropdown menu with "- Select -"), "Array Type" (a dropdown menu with "- Select -"), "Mounting Type" (a dropdown menu with "- Select -"), "Tilt" (a text input field), and "Azimuth" (a text input field). At the bottom, there is a "PV Watts Report" section with a "Choose File" button, and "Cancel" and "Save" buttons.

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 *

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 *

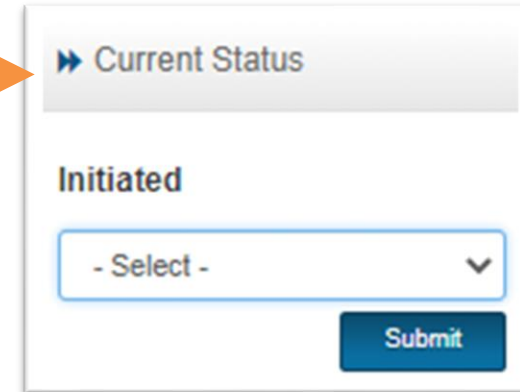
- Select -
- Select -
- Copy of recent customer electric bill
- Copy of signed customer contract
- Map of location for the installation site (New Construction projects only)
- Copy of signed final customer invoice
- List of module and inverter serial numbers
- Copy of customer warranty
- Photo/Copy of 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
 - **Commercial projects only**
 - 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



▶ Current Status

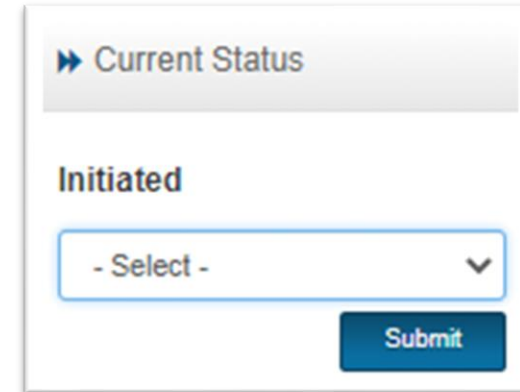
Initiated

- Select -

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

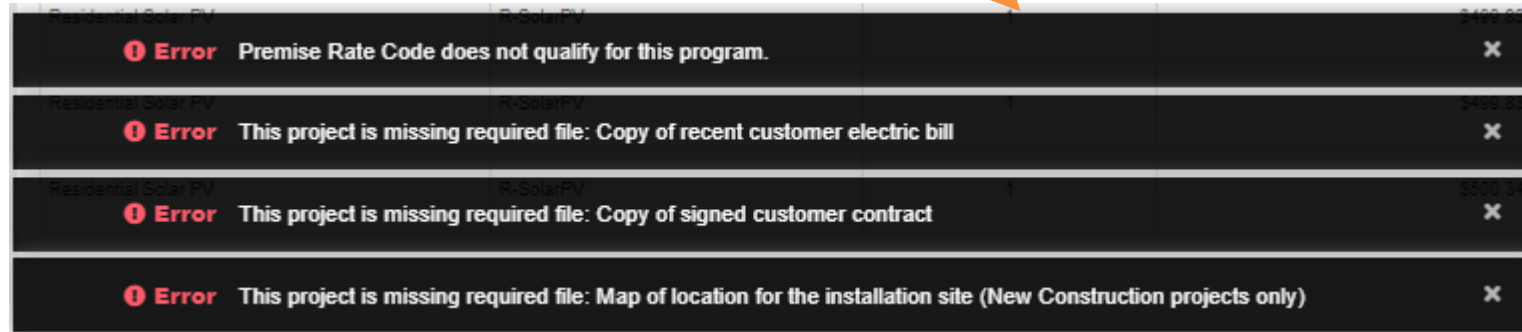


▶ Current Status

Initiated

- Select -

Submit



Error Premise Rate Code does not qualify for this program. x

Error This project is missing required file: Copy of recent customer electric bill x

Error This project is missing required file: Copy of signed customer contract x

Error This project is missing required file: Map of location for the installation site (New Construction projects only) x

After Construction is Complete

- Log back in, pull up project (Commercial projects will still be in Work Completion Pending)
 - Go to Projects list, use search, filter and sort features, select Project Name

The screenshot displays the 'PROJECT LIST' interface. At the top, there are navigation tabs: HOME, DASHBOARD, PROGRAMS, and PROJECTS. The 'PROJECTS' tab is active. Below the navigation, there is a 'Project List' section with a '+ New Project' button and a 'Batch Actions' dropdown. A search bar is present with a 'Go' button. The main content is a table with columns: ID, Project Name, Program Name, Year, Status, Date Submitted, # of Premises, # of Measures, Savings, and Incentive. A search bar is overlaid on the table, and three orange arrows point to the search bar, the 'Project Name' column header, and the 'Project Name' column header, labeled 'Search', 'Filter', and 'Sort' respectively. The table shows three entries:

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 4,838.87 kWh	\$1,500.00
6609	SteveCommProject	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

The screenshot displays the 'Measures' section of a software interface. At the top, there is a '+ Add Measure' button. Below it, a section titled 'Premise Information' contains details for a project: Company: Solar Co, Customer: Joe Solar, Premise No.: 10204049798054160, Meter No.: 0588460446, Address: 2530 PULLIAM ST SAN ANGELO, TX 76905, County: TOM GREEN, and Incentive: \$1,500.00. To the right of this information, 'Savings' are listed as 1.240 kW and 4,636.87 kWh. Below the premise information, a specific measure is highlighted: 'Residential Solar PV' with a value of \$499.83 and a gear icon. An orange arrow points from the gear icon to a dropdown menu containing 'History', 'Edit', and 'Delete' options. Below the measure name, there is a 'Measure Information' table with the following data:

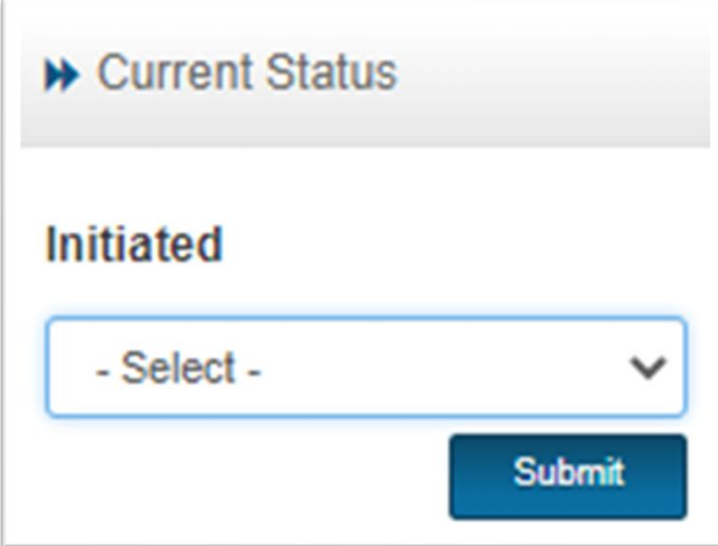
Measure Information	
Module Manufacturer	Solar Co
Rated Watts DC Module	300
Num Array Modules	30

Below the table, there is a 'DC System Size' field with a dropdown arrow.

- 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)

Submit: Residential Projects

- **Reminder**, there will be no Pre-Approval/funding reservation period for residential projects. Pre-Approval only applies to commercial projects. Residential projects are to be created and submitted for review and potential funding/approval after they are completed. These projects are to be moved from Initiated to Final Approval Pending using the Current Status indicator. However, premise and measure entry will be the same process.



▶ Current Status

Initiated

- Select -

Submit

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
+ Create Project		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 SourceSM 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
737-443-7841
- Deeper dives:
 - P3 user questions: Tracie Cooper, tcooper@frontierenergy.com,
737-236-0246
 - Program design questions: Steve Wiese, swiese@frontierenergy.com,
737-236-0255
 - AEP questions, Melissa Proske, maproske@aep.com
 - AEP interconnection questions, Rosalba Epps, raepps@aep.com

Thank You!

