



## **SOUTHWESTERN ELECTRIC POWER COMPANY**

### **2010 RESIDENTIAL STANDARD OFFER PROGRAM**

### **USER GUIDE FOR PROJECTS SPONSORS**



**April 2010**

## Table of Contents

<b>INTRODUCTION</b> .....	3
Figure 1: AEP SWEPCO Residential SOP Home Page .....	4
Figure 2: Project Sponsor Forms .....	5
Figure 3: Project Sponsor Forms (cont'd.) .....	6
<b>APPLICATION</b> .....	7
Figure 4: Login Screen – Register as a New User .....	7
Figure 5: Registration .....	8
Figure 6: Login .....	8
Figures 7 & 8: Activate Account .....	9
Figures 9 & 10: Tax ID.....	10
Figures 11 & 12: Profile Update.....	11
Figure 13: Sponsor Details.....	12
Figure 14: Subcontractor Information .....	13
Figure 15: Affiliated Firms .....	14
Figure 16: Qualification Documents.....	15
Figure 17: Insurance Information .....	15
Figure 18: Home .....	16
Figure 19: Home – list of SOP Programs .....	17
Figure 20: Program Application Summary.....	18
Figure 21: Project Description.....	19
Figure 22: Target Customers .....	20
Figure 23: Measure Types .....	21
Figure 24: Marketing Plan .....	22
Figure 25: Additional Questions.....	23
Figure 26: Select Subcontractors .....	24
Figure 27: Select Affiliate Firms .....	25
Figure 28: Application Complete.....	26
Figure 29: Submission Day.....	27
Figures 30 & 31: Submit an Application .....	28

## INTRODUCTION

The User Guide provides Project Sponsors participating in AEP SWEPCO's Residential Standard Offer Program with guidelines for using the online data tracking system. This guide explains the steps for completing application forms, entering data for completed efficiency work, and invoice reporting.

When working with the online database forms, please observe the following guidelines:

- Unless specifically directed to use the browser's buttons, use the navigation buttons provided on the forms.
- Avoid pressing a "submit" or "accept" button multiple times if your browser performance slows. This could result in multiple submissions of the same form.
- Review the entire form before proceeding to ensure that all of the information required is available. If your browser is inactive for more than 30 minutes, you will be automatically logged off and may need to reenter data. To avoid this, try to save your information regularly.
- If you plan to enter data in multiple online database programs, work with only one program at a time. Simultaneously opening multiple browsers can present problems since information is temporarily stored on your computer about each session and could conflict with data from the other program.
- Although not necessary to successfully complete each form, fields should not be left blank. Enter "None" or "N/A" if the field does not apply.

The items in ***bold italics*** are selection items/buttons as they are displayed on the screen.

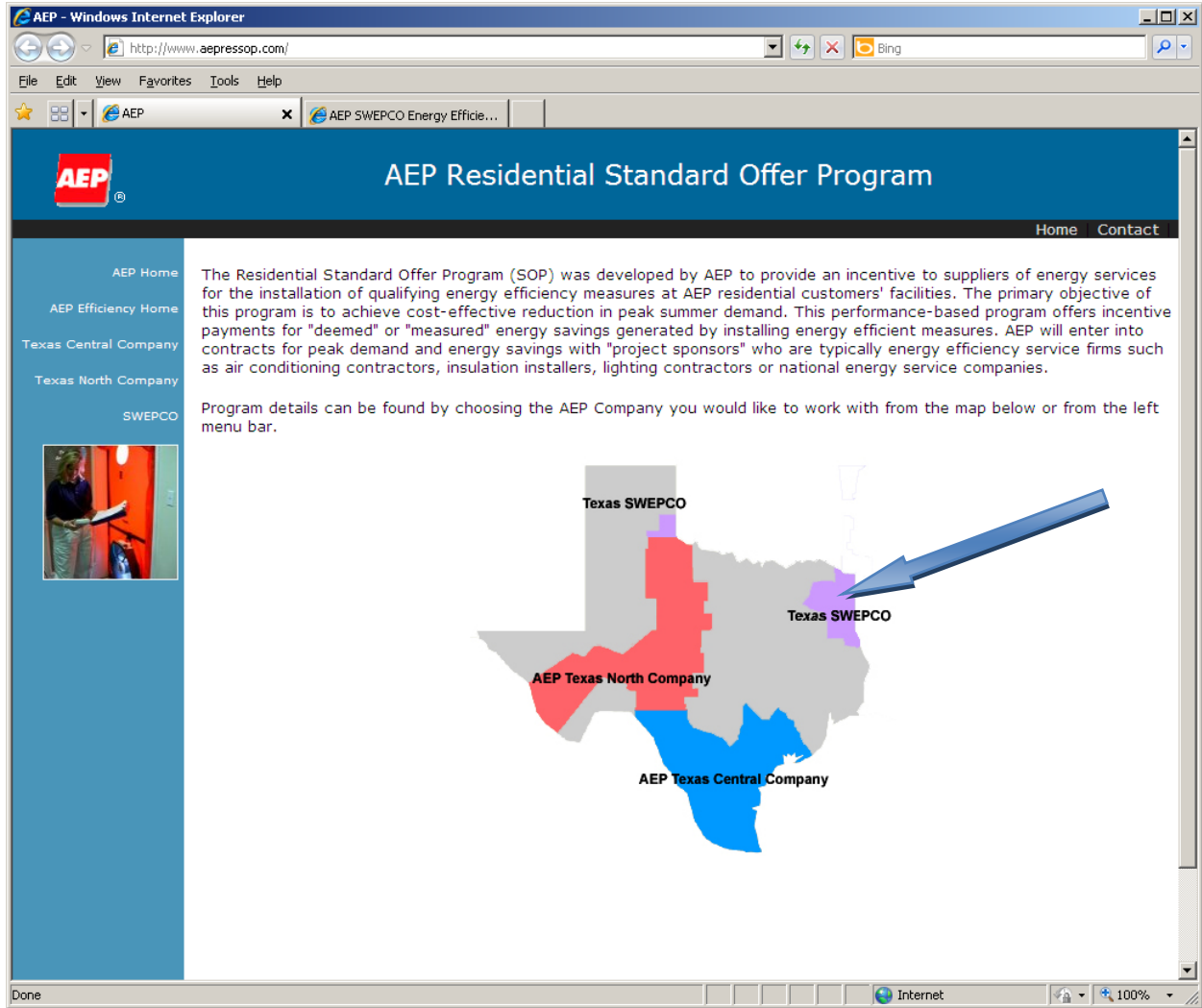
The online data tracking system used for the Standard Offer Energy Efficiency Programs is ***EnerTrek***<sup>®</sup>, developed specifically for the various Standard Offer Programs being implemented by Texas electric utilities. For the sake of discussion purposes, the online data tracking system will be referred to as simply ***EnerTrek***.

***Please note: Some images from previous program years are used in this User Guide. Please disregard these minor differences.***



To access **EnerTrek**<sup>®</sup>, visit AEP SWEPCO's Standard Offer Program Home Page at: <http://www.aepressop.com>

**Figure 1: AEP SWEPCO Residential SOP Home Page**



- Click the SWEPCO portion of the state map to advance to the RSOP page.

## Figure 2: Project Sponsor Forms

- Select *Project Sponsor Forms* above the first table.


SWEPCO Residential Standard Offer Program
Home | Contact

AEP Home  
AEP Efficiency Home  
Residential Home  
News & Updates  
FAQs  
Program Manual  
Downloads/Tools  
Application Login



### Program Summary

The Residential Standard Offer Program (SOP) was developed by AEP SWEPCO (SWEPCO) to provide incentives to suppliers of energy services for electric savings gained from the installation of qualifying energy efficiency measures at SWEPCO customers' homes. The primary objective of this program is to achieve cost-effective reduction in peak summer demand.

SWEPCO will enter into contracts for peak demand and energy savings with "project sponsors" who are typically energy efficiency service firms such as air conditioning contractors, insulation installers, lighting contractors or national energy service companies. Program details can be found in our program manual, which can be found on the [Downloads/Tools](#) page.

### 2010 Program Information - Updated 4/1/2010

The 2010 SWEPCO RSOP application is now available. See [Project Sponsor Forms](#) to access the 2010 program.

<b>Large Projects:</b>	
January 25, 2010	Register and begin completing applications
January 27, 2010, 10:00 AM CST	Submit Large Project Applications
<b>Small Projects:</b>	
January 25, 2010	Register and begin completing applications
February 4, 2010, 10:00 AM CST	Submit Small Project Applications

SWEPCO will continue accepting applications until it appears that all funds for the program year will be dispensed.

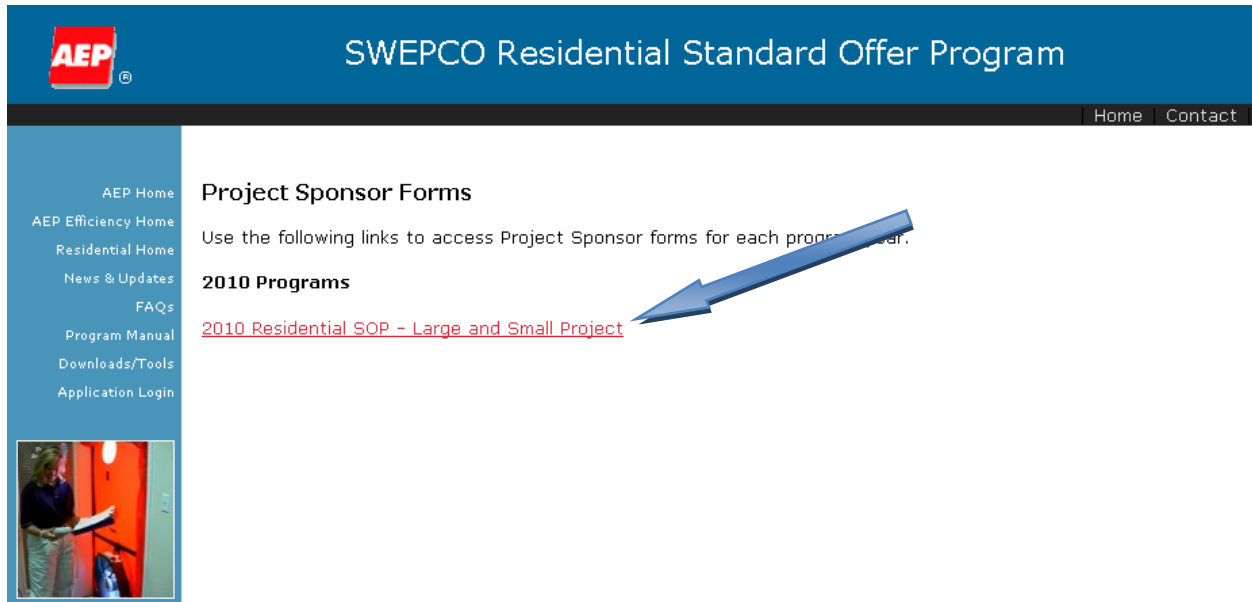
### Program Changes

Significant changes were made in the SWEPCO RSOP for 2009. These changes remain in effect for 2010. The program process and requirements are now different from the AEP Texas Companies. As a result, this separate manual has been created to provide information solely for the SWEPCO RSOP.

Key changes to the program include:

### Figure 3: Project Sponsor Forms (cont'd.)

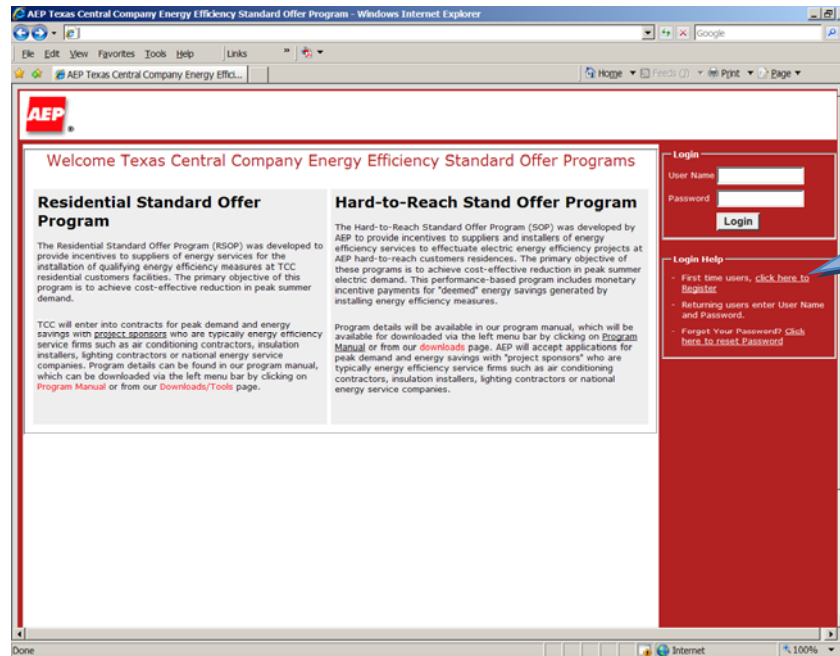
- Select the appropriate program link.



## APPLICATION

**Figure 4: Login Screen – Register as a New User**

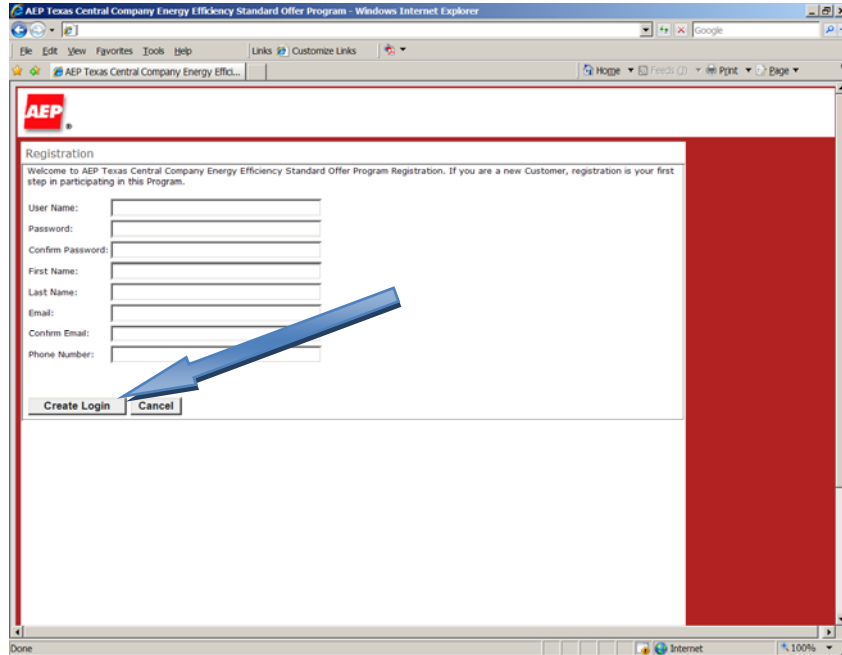
- First, register as a new user by clicking on the link at the right side of the page under Login Help – ***First time users click here to Register.***
- All applicants must register as a new user in 2010, including all 2009 program participants.



- If you have already registered for the 2010 program, enter your user name and password on this login page.

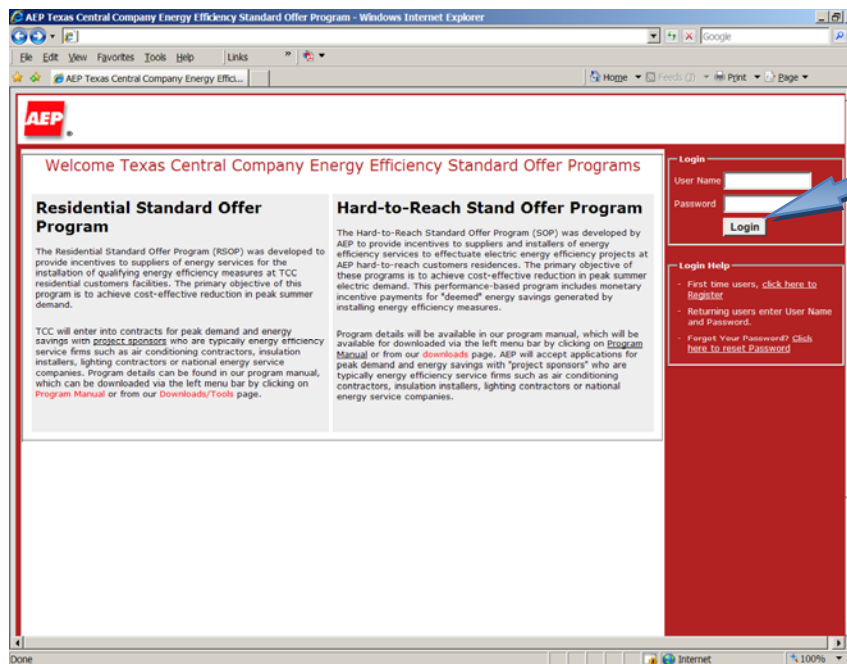
**Figure 5: Registration**

- Complete all fields in the registration form. The user name and password are case sensitive. After completing the form, click **Create Login**.



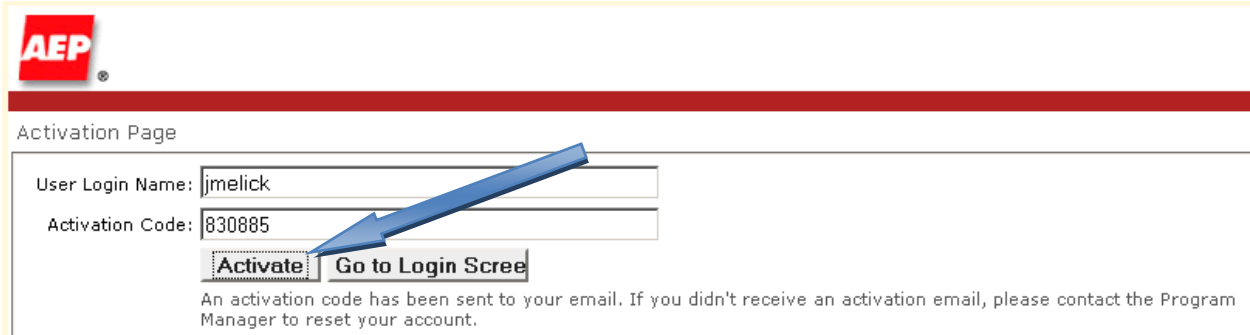
**Figure 6: Login**

- After registering, login by filling in the user name and password and clicking **Login**.




### Figures 7 & 8: Activate Account

- To begin, the account must first be activated. An email containing an activation code was sent to the email address entered at registration. Copy and paste this activation code into the form and click **Activate**. Doing so will automatically advance the screen to the login page.



The screenshot shows the AEP logo at the top left. Below it is the text "Activation Page". There are two input fields: "User Login Name:" with the value "jmelick" and "Activation Code:" with the value "830885". Below these fields are two buttons: "Activate" and "Go to Login Screen". A blue 3D arrow points to the "Activate" button. Below the buttons is a message: "An activation code has been sent to your email. If you didn't receive an activation email, please contact the Program Manager to reset your account."



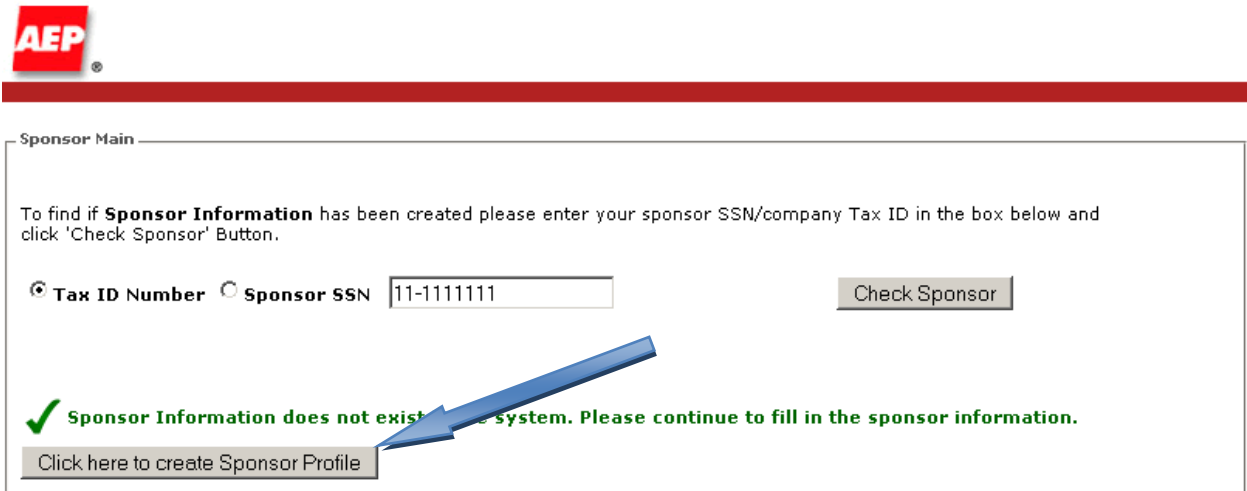
The screenshot shows the AEP logo at the top left. Below it is the text "Activation Page". There are two input fields: "User Login Name:" with the value "jmelick" and "Activation Code:" with the value "830885". Below these fields are two buttons: "Activate" and "Go to Login Screen". A blue 3D arrow points to the "Go to Login Screen" button. Below the buttons is a green message: "This account is activated. Please go to login screen to sign in to AEP SWEPCO Energy Efficiency Standard Offer Program."

### Figures 9 & 10: Tax ID

- Once logged in, enter the project sponsor’s federal tax ID or social security number, then click on **Check Sponsor**. If no duplicate is found, click on the button that appeared stating **Click here to Create Sponsor Profile**.



The screenshot shows the AEP logo at the top left. Below it is a red horizontal bar. The main content area is titled "Sponsor Main" and contains the following text: "To find if **Sponsor Information** has been created please enter your sponsor SSN/company Tax ID in the box below and click 'Check Sponsor' Button." There are two radio buttons: "Tax ID Number" (which is selected) and "Sponsor SSN". A text input field contains the value "11-1111111". To the right of the input field is a grey button labeled "Check Sponsor". A blue arrow points from the right side of the page towards the "Check Sponsor" button.



The screenshot shows the AEP logo at the top left. Below it is a red horizontal bar. The main content area is titled "Sponsor Main" and contains the following text: "To find if **Sponsor Information** has been created please enter your sponsor SSN/company Tax ID in the box below and click 'Check Sponsor' Button." There are two radio buttons: "Tax ID Number" (which is selected) and "Sponsor SSN". A text input field contains the value "11-1111111". To the right of the input field is a grey button labeled "Check Sponsor". Below this, there is a green checkmark icon followed by the text: "Sponsor Information does not exist in the system. Please continue to fill in the sponsor information." At the bottom left, there is a grey button labeled "Click here to create Sponsor Profile". A blue arrow points from the right side of the page towards the "Click here to create Sponsor Profile" button.

### Figures 11 & 12: Profile Update

Sponsor Company Profile

**Check All that Apply:**     Women Owned     Minority Owned     Disabled Veteran Owned

**Name of Remittance Company:**  \*

(Enter Name as it should appear on contract)

**Project Sponsor Name:**  \*

**Address 1:**  \*

**Address 2:**

**City / State / Zip:**  / TX  \*

**Tax ID Number:**  \*     Tax ID     SSN

**Parent Company:**

**Parent Company Tax ID Number:**      Tax ID     SSN

- Complete the Profile Update form and click on the *Save Sponsor Profile* button at the bottom of the form.

**Contact Name on Sponsor List:**

**Contact Phone on Sponsor List:**

**Contact Email on Sponsor List:**

\* Indicates a required field



Figure 13: Sponsor Details

03/31/2010 | Welcome, Test User | Sign Off

**AEP**

Home Settings **Sponsor Details** Help

Sponsor Profile  
Subcontractor Info  
Affiliated Firms Info  
Qualification Info  
Insurance Info

**Profile Update**

Profile Update

Sponsor Company P

**Check All that Apply:**  Women Owned  Minority Owned  Disabled Veteran Owned

Name of Remittance Company: Testing Company \*

(Enter Name as it should appear on contract)

Project Sponsor Name: Test Sponsor \*

Address 1: 123 Main Street \*

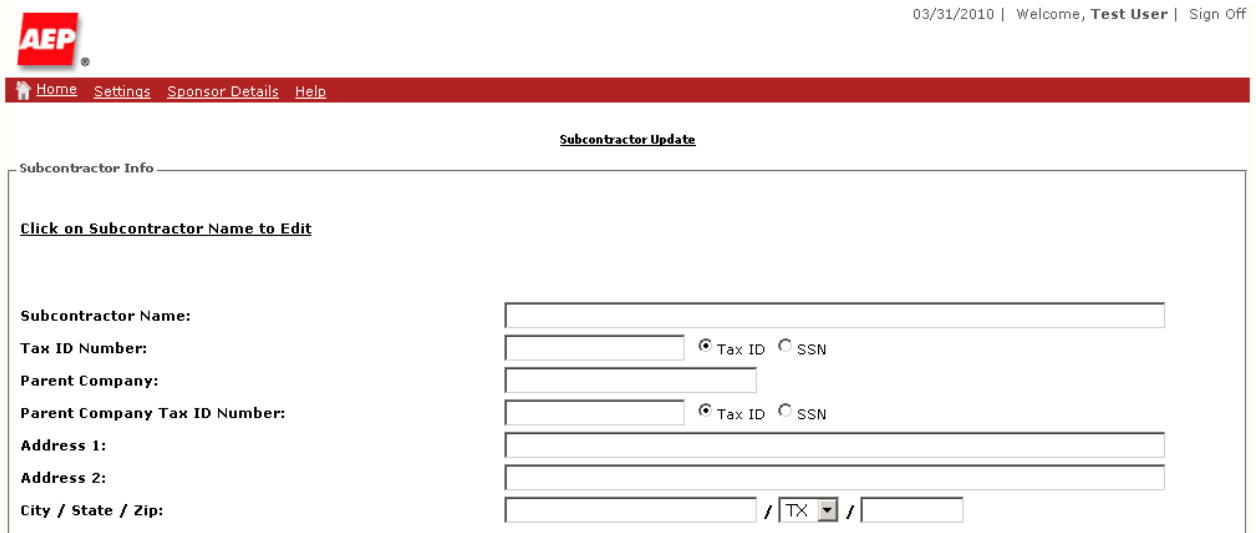
Address 2:

City / State / Zip: Austin / TX / 78705 \*

- On the top menu, click on Sponsor Details to see the dropdown list of more forms which must be completed.
  - Subcontractor Information
  - Affiliate Information
  - Qualification Information
  - Insurance Information
- **All of the information under Sponsor Details will be used for all SWEPCO programs so these sections need only be submitted once.**

### Figure 14: Subcontractor Information

- Enter the subcontractor information and click on **Add New Subcontractor**.
- To add multiple subcontractors, complete and submit the form for each subcontractor that will work for you under any SWEPCO program during the current program year.



03/31/2010 | Welcome, **Test User** | Sign Off

**AEP**

[Home](#) [Settings](#) [Sponsor Details](#) [Help](#)

**Subcontractor Update**

Subcontractor Info

[Click on Subcontractor Name to Edit](#)

**Subcontractor Name:**

**Tax ID Number:**   Tax ID  SSN

**Parent Company:**

**Parent Company Tax ID Number:**   Tax ID  SSN

**Address 1:**

**Address 2:**

**City / State / Zip:**  / TX

- To remove a subcontractor from your application, click on the subcontractor name in the list at the top of the page, then click the Remove button.

### Figure 15: Affiliated Firms

- Enter the information for the affiliated firms and click **Add New Affiliated Firm**.
- Repeat this process for multiple affiliated firms.

03/31/2010 | Welcome, **Test User** | Sign Off

**AEP**

Home Settings Sponsor Details Help

**Affiliated Firms Update**

Affiliated Firms Info

Click on Affiliated Firm Name to Edit

**Affiliated Firm Name:**

**Tax ID Number:**   Tax ID  SSN

**Parent Company:**

**Parent Company TaxID Number:**   Tax ID  SSN

**Address 1:**

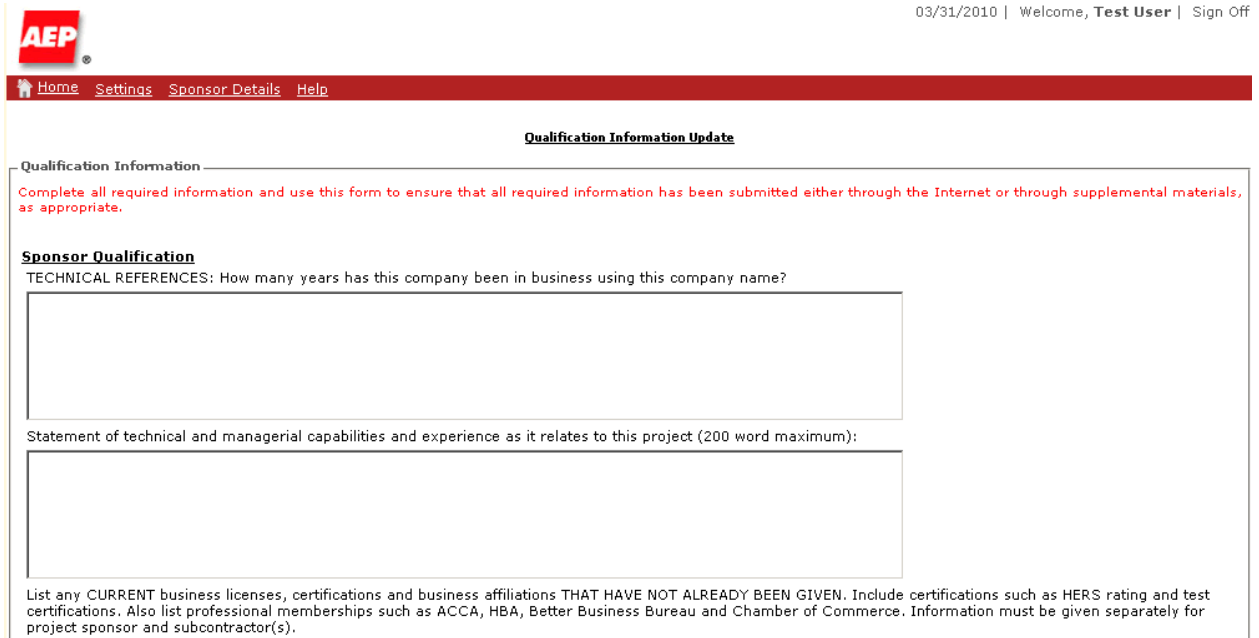
**Address 2:**

**City / State / Zip:**  / TX /

- To remove an affiliate firm from your application, click on the affiliate name in the list at the top of the page, then click the Remove button.

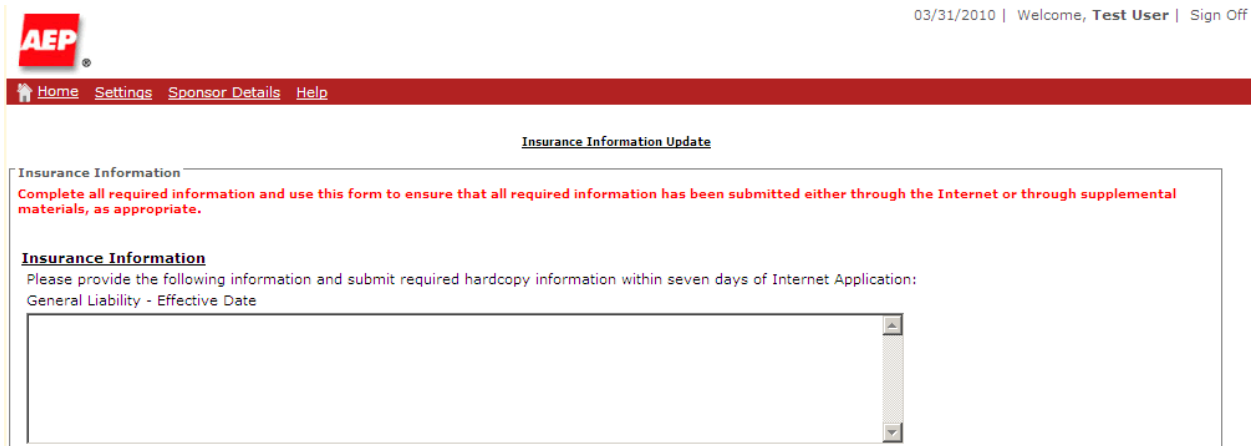
### Figure 16: Qualification Documents

- Enter the information about the sponsor’s and subcontractor’s qualifications. When all fields are complete, click *Accept Company Qualifications Documentation*.



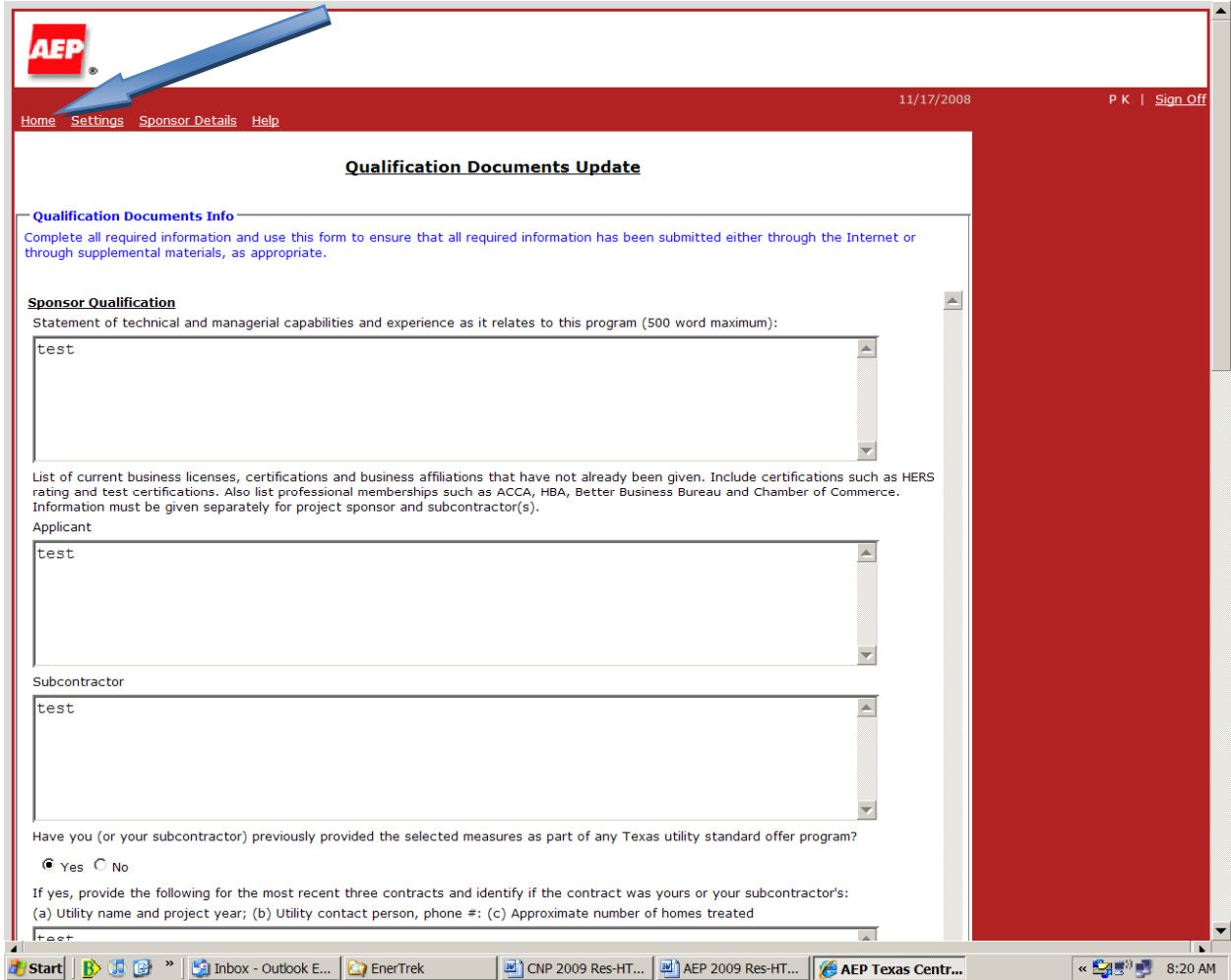
### Figure 17: Insurance Information

- Enter the information about the sponsor’s Insurance. When all fields are complete, click *Accept Company Insurance*.



### Figure 18: Home

When all Sponsor Detail sections are complete, click *Home* on the top menu bar.



### Figure 19: Home – list of SOP Programs

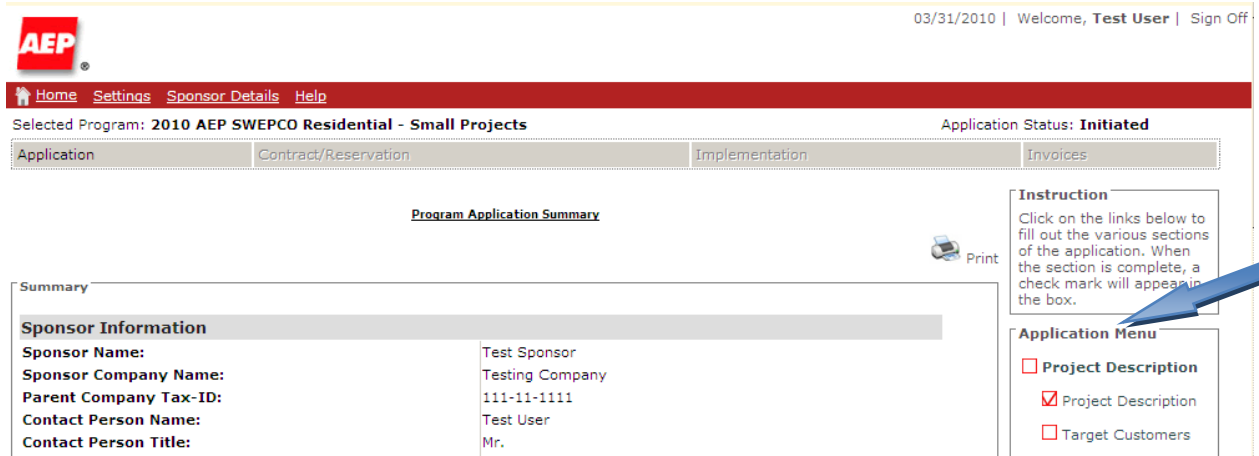
- To create an application for a specific program, click *Create Application* for the appropriate program.

The screenshot shows the AEP Home page. At the top right, it displays the date '03/31/2010', the user name 'Welcome, Test User', and a 'Sign Off' link. Below this is a red navigation bar with links for 'Home', 'Settings', 'Sponsor Details', and 'Help'. A list of instructions is provided, including a bolded instruction: 'Please fill out Sponsor Details on top menu first before creating an application'. Below the instructions is a table with three columns: '2010 Programs', 'Sponsor Application', and 'Program Submission Date'. The table lists three programs, each with a 'Create Application' link. A blue arrow points to the 'Create Application' link for the first program, '2010 AEP SWEPCO Residential - Large Projects'.

2010 Programs	Sponsor Application	Program Submission Date
2010 AEP SWEPCO Residential - Large Projects	<a href="#">Create Application</a>	Not Initiated Yet 1/27/2010 10:00:00 AM
2010 AEP SWEPCO Residential - Small Projects	<a href="#">Create Application</a>	Not Initiated Yet 2/4/2010 10:00:00 AM
2010 AEP SWEPCO Hard-to-Reach SOP - Small Projects	<a href="#">Create Application</a>	Not Initiated Yet 12/1/2009 10:00:00 AM

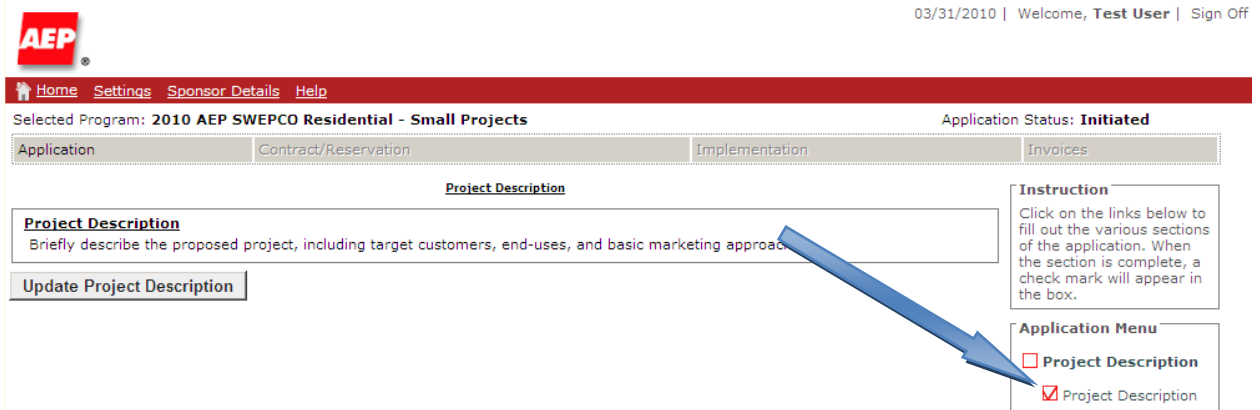
### Figure 20: Program Application Summary

- This page displays a summary of the application.
- On the right side of the screen is the Application Menu which indicates the various sections of the application project description.
- When each section is complete, a check mark will appear in the box. The application cannot be submitted until all sections are complete.



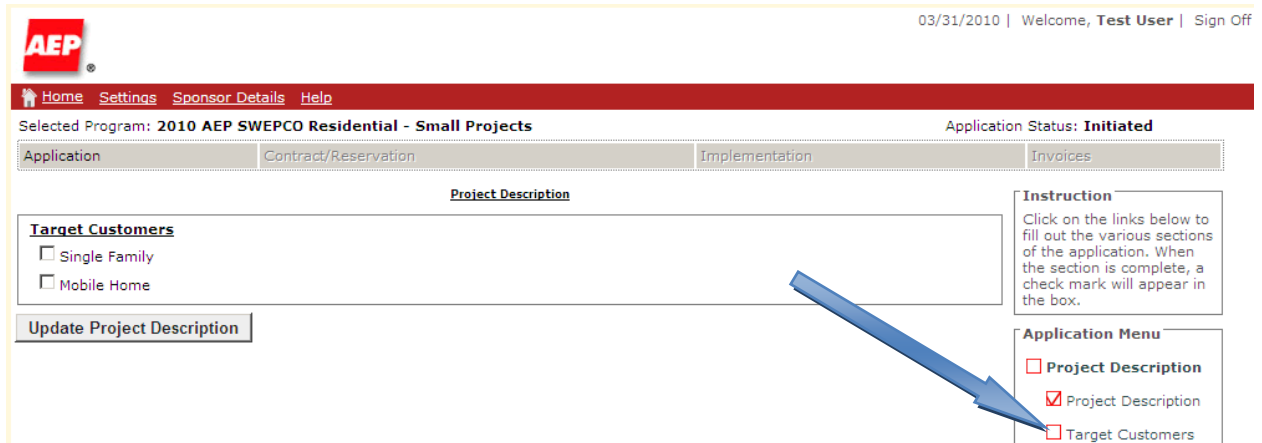
### Figure 21: Project Description

- Click **Project Description** in the right menu to access the Project Description form.
- Enter a description of the proposed project for this program, then click **Update Project Description**.



### Figure 22: Target Customers

- Click **Target Customers** in the right menu to access this form.
- Indicate which customers your projects will target, then click **Update Project Description**.



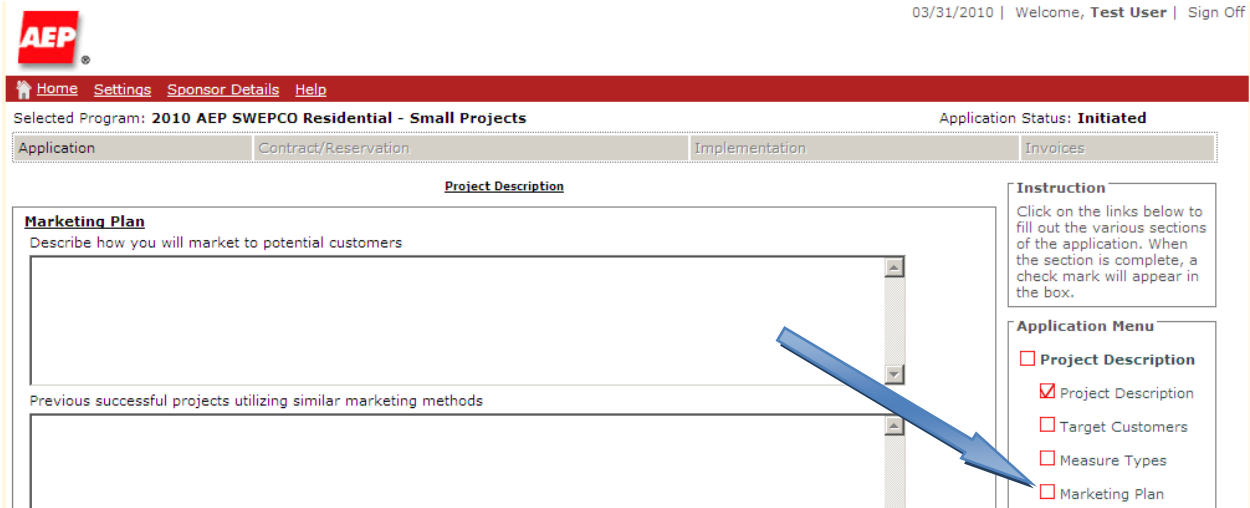
### Figure 23: Measure Types

- Indicate which type of Measure Types will be used for this project, then click **Update Project Description**.

The screenshot shows the AEP web application interface. At the top right, the date is 03/31/2010 and the user is identified as 'Test User'. The navigation bar includes 'Home', 'Settings', 'Sponsor Details', and 'Help'. The selected program is '2010 AEP SWEPCO Residential - Small Projects' with an application status of 'Initiated'. The main content area is divided into four tabs: 'Application', 'Contract/Reservation', 'Implementation', and 'Invoices'. The 'Project Description' section is active, asking 'What measures will you install under this contract?' and listing several HVAC options with checkboxes: Central Air Conditioning, Central Heat Pump, Package Unit - AC, Package Unit - Heat Pump, and Ground Source Heat Pump. On the right, an 'Application Menu' shows 'Project Description' selected with a checkmark, while 'Target Customers' and 'Measure Types' are unselected. A blue arrow points to the 'Project Description' option in the menu. An 'Instruction' box explains that clicking on the links will fill out the application sections, and a checkmark will appear when complete.

**Figure 24: Marketing Plan**

- Enter a description of the proposed marketing plan, then click **Update Project Description**.



### Figure 25: Additional Questions

- Answer the additional questions on this form and save the information by clicking **Update Project Description**.

The screenshot displays the AEP web application interface. At the top left is the AEP logo. The top right shows the date '03/31/2010', the user name 'Welcome, Test User', and a 'Sign Off' link. Below this is a navigation bar with links for 'Home', 'Settings', 'Sponsor Details', and 'Help'. The main content area shows the 'Selected Program: 2010 AEP SWEPCO Residential - Small Projects' and 'Application Status: Initiated'. A tabbed interface is visible with 'Application', 'Contract/Reservation', 'Implementation', and 'Invoices' tabs. The 'Project Description' section is active, containing 'Additional Questions' with three checkboxes: 'Project Sponsor only', 'Subcontractor only (must be listed under Subcontractors Information)', and 'Both Project Sponsor & Subcontractor'. Below these is a text area for providing details. To the right, an 'Instruction' box explains that clicking links fills out sections, and a checkmark indicates completion. The 'Application Menu' on the right lists 'Project Description' (checked), 'Target Customers', 'Measure Types', 'Marketing Plan', and 'Additional Questions'. A blue arrow points from the 'Additional Questions' menu item to the form's 'Additional Questions' section.

**Figure 26: Select Subcontractors**

- Choose the subcontractors who will be involved in this program or check the box stating that subcontractors will not be used.

03/31/2010 | Welcome, Test User | Sign Off

**AEP**

Home Settings Sponsor Details Help

Selected Program: 2010 AEP SWEPCO Residential - Small Projects Application Status: Initiated

Application Contract/Reservation Implementation Invoices

**Select Subcontractor**

Select Check box to Add Subcontractor to Program Application

SubContractor Name	Select to Add Subcontractor	Contact First Name	Contact Last Name	Contact Phone	Contact Email	Website
Test Subcontractor	<input type="checkbox"/>	Test	Subcontractor	(987)654-3210	jmelick@frontierassoc.com	http://www.google.com/

Check here if you will not use Subcontractors

**Instruction**  
Click on the links below to fill out the various sections of the application. When the section is complete, a check mark will appear in the box.

**Application Menu**

- Project Description
- Project Description
- Target Customers
- Measure Types
- Marketing Plan
- Additional Questions
- Subcontractor

**Figure 27: Select Affiliate Firms**

- Choose the affiliate firms or check the box stating there are no affiliates, then click *Update Affiliate Firms Selection*.

03/31/2010 | Welcome, Test User | Sign Off

Home Settings Sponsor Details Help

Selected Program: 2010 AEP SWEPCO Residential - Small Projects Application Status: Initiated

Application Contract/Reservation Implementation Invoices

**Select Affiliated Firms**

Select Check box to Add Affiliated Firm to Program Application

Affiliated Firm Name	Select To Add Affiliated Firm	Contact First Name	Contact Last Name	Contact Phone	Contact Email	Website
Test Affiliated Firm	<input type="checkbox"/>	Test	Affiliated Firm	(741)852-9630	jmelick@frontierassoc.com	http://www.yahoo.com/

If you have **NO Affiliated Firm**, you must check the following box before submitting your application.

I have read and understand the PUCT-approved definition of an affiliate firm (see the Program Manual). Applicant has no affiliate firm relationships that would qualify under this definition.

**Instruction**  
Click on the links below to fill out the various sections of the application. When the section is complete, a check mark will appear in the box.

**Application Menu**

- Project Description
- Project Description
- Target Customers
- Measure Types
- Marketing Plan
- Additional Questions
- Subcontractor
- Affiliated Firm

**Figure 28: Application Complete**

- When all sections of the Application Menu are checked as completed, the application is ready to be submitted on the designated submit date and time.

**Program Application Summary** [Print Summary]

Summary

**Sponsor Information**

Sponsor Name:	Frontier Testing Company
Sponsor Company Name:	Frontier Testing Inc.
Parent Company Tax-ID:	
Contact Person Name:	P, K
Contact Person Title:	
Address 1:	123 Main
Address 2:	
City / State / Zip:	Austin / TX / 000000
Phone 1:	(555)555-5555
Phone 2:	
FAX:	
Email:	pkeegan@frontierassoc.com
Website:	
Women Owned?:	<input checked="" type="checkbox"/>
Minority Owned?:	<input checked="" type="checkbox"/>
Disabled Veteran Owned?:	<input checked="" type="checkbox"/>
Last Updated On:	11/12/2008 8:43:57 PM

**Estimated Impact**

Estimated Total Savings kW :	20.00
Estimated Total Savings kWh :	100,000.00
Estimated Total Incentives :	\$20,000.00

**User Information**

**User Information - 1**

User Name:	P, K
Phone#:	(555)555-5555
Email:	pkeegan@frontierassoc.com

**Application Menu**

- Project Description
  - Description
  - Target Customers
  - M&V Plan
  - Marketing Plan
  - Additional Questions
  - Measure Types
- Estimated Impact
- Subcontractor
- Affiliated Firm
- Qualification Docs

**Application Info**

Application Summary

Click on the links below to fill out the various sections of the application. When the section is complete, a check mark will appear in the box.

### Figure 29: Submission Day

- On the application submission date, login and click **Ready to Submit** for the program to be submitted.

The screenshot shows the AEP web application interface. At the top right, it displays the date '04/01/2010', the user name 'Welcome, Test User', and a 'Sign Off' link. Below this is a navigation menu with 'Home', 'Settings', 'Sponsor Details', and 'Help'. A list of instructions is provided, including a red heading: 'Please fill out Sponsor Details on top menu first before creating an application'. Below the instructions is a table with columns: '2010 Programs', 'Sponsor Application', 'Status', and 'Program Submission Date'. The table contains three rows of data. A blue arrow points to a 'Ready to Submit' button located in the rightmost column of the second row.

2010 Programs	Sponsor Application	Status	Program Submission Date
2010 AEP SWEPCO Residential - Large Projects	<a href="#">Create Application</a>	Not Initiated Yet	1/27/2010 10:00:00 AM
2010 AEP SWEPCO Residential - Small Projects	<a href="#">Edit Application</a>	Initiated @3/31/2010	2/4/2010 10:00:00 AM
2010 AEP SWEPCO Hard-to-Reach SOP - Small Projects	<a href="#">Create Application</a>	Not Initiated Yet	12/1/2009 10:00:00 AM

## Figures 30 & 31: Submit an Application

1. If question marks appear on the following page, refresh the screen (F5) after the designated submit time.
2. After the designated submit time, a 4-digit number will appear after refreshing the screen.
3. Enter the 4 digits into the box.
4. When the number has been entered correctly, click **Submit Application**.



- A message will then appear to confirm that the application has been successfully submitted. An email confirmation will be sent, as well.

