

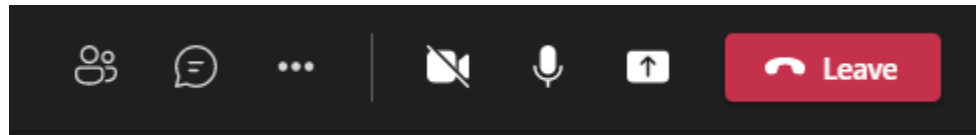


# **SMART Source<sup>SM</sup> Solar PV Program**

## **2023 Enrollment Kickoff**

**December 15, 10 a.m. 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
  - 2022 Successes and Challenges
  - Key updates in 2023
  - 2023 Program Overview
    - Utility service areas
    - Service provider/customer eligibility
    - Program budgets, incentive levels, limits
    - Possible 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

# 2022 Successes and Challenges

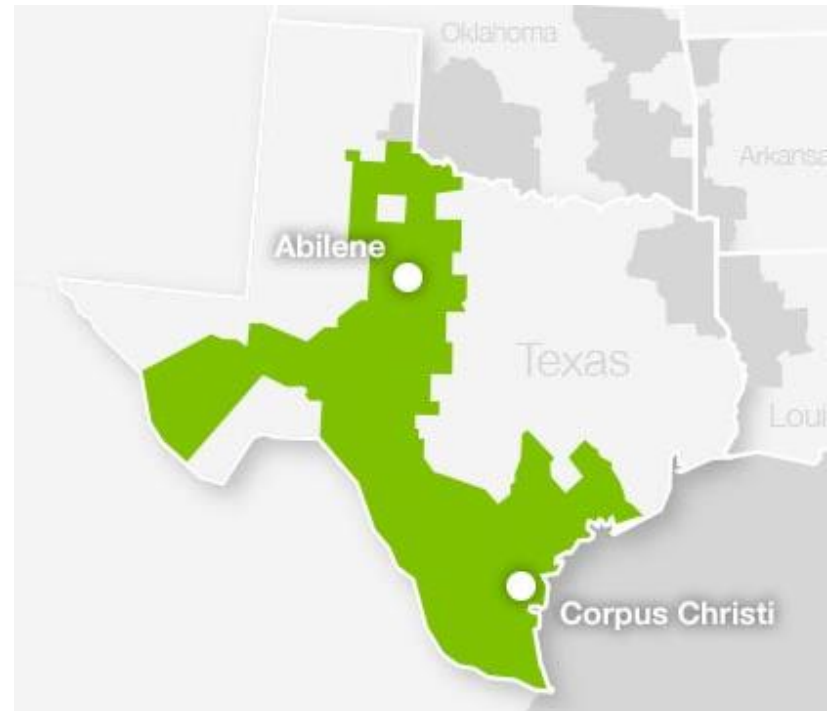
- Successes
  - TCC Residential:
    - 56 projects
    - 278.335 kW
    - 953,578 kWh
  - TNC Residential:
    - 27 projects
    - 107.587 kW
    - 358,879.18 kWh
  - Dealing with COVID-19
- Challenges
  - Material cost/availability
  - Late or no completion; especially with commercial projects
  - Requesting extensions for late completions

# 2023 - Key Updates



# 2023 - Key Updates

- 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**



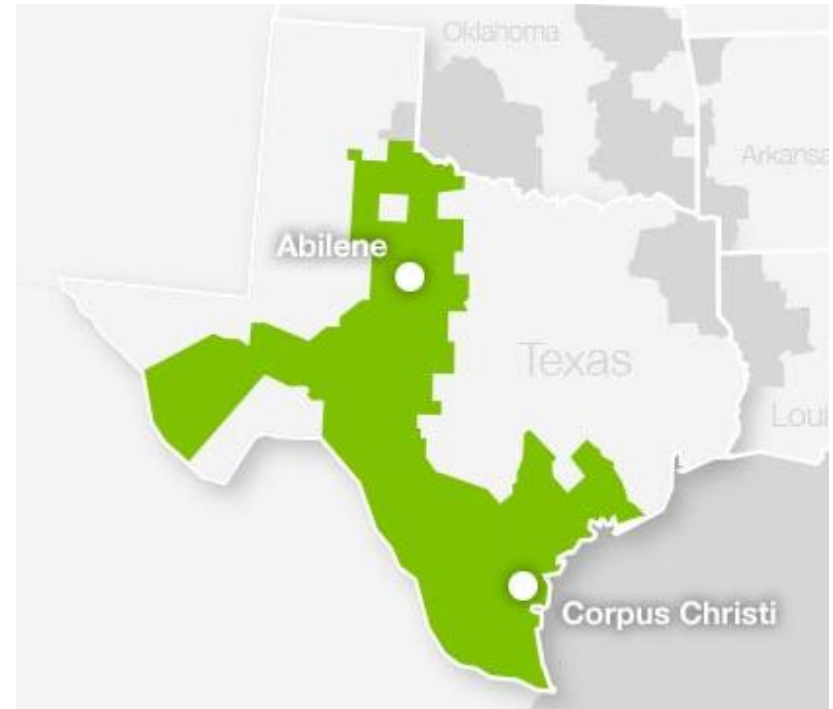
PROGRAM PORTFOLIO PORTAL

# 2023 Programs Overview

# 2023 Programs Overview

## AEP Texas Service Area

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





# 2023 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)



# 2023 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#

# 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*

# 2023 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, 2023 if funding has not been claimed

# 2023 Update Under Consideration

## 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

## Possible Solutions

- 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)

# 2023 Update Under Consideration

## New Opportunities

- We are considering 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

# 2023 Tracking System

## P3 – Program Portfolio Portal





**PROGRAM PORTFOLIO PORTAL**

**[aeptexas.p3.enertrek.com](http://aeptexas.p3.enertrek.com)**

- TCC and TNC will now be combined into a single database
- The new URL is [aeptexas.p3.enertrek.com](https://aeptexas.p3.enertrek.com)

- If you have an existing account with either the TCC or TNC P3 database, you will be automatically registered in the new database
- In your browser navigate to [aeptexas.p3.enertrek.com](https://aeptexas.p3.enertrek.com)
- Click on the [Forgot Password?](#) link in blue.

## Reset Password

Please enter your username or email address. You will receive a link to create a new password via email.

### Account Information

E-mail:

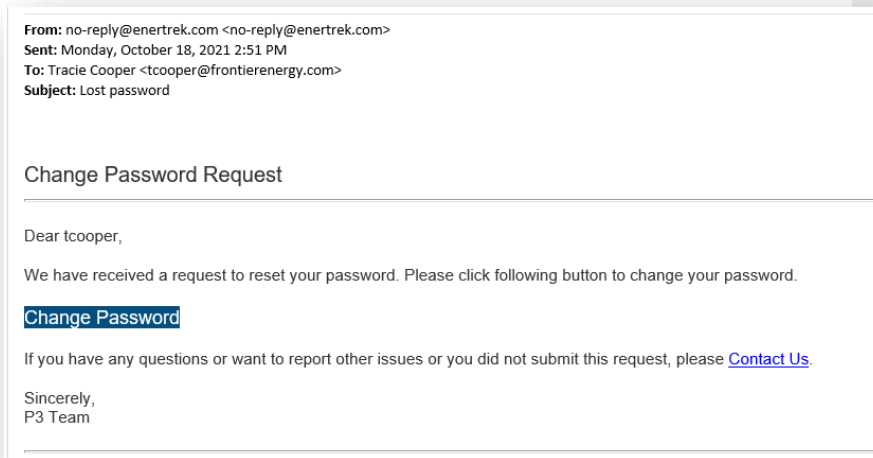
Send Request



© 2021 Frontier Energy | [Privacy Policy](#)

- Input your email address associated with your TCC/TNC P3 account
- Click the **Send Request** button in blue
- You will receive an email with a link to create a new password for the site
- Please check your spam or junk folder if you don't receive it within 10 minutes

- Click the Change Password button in the email
- Create a new password and confirm it
- This will be your new password moving forward



## Change Password

Use the form below to change your password.

**Account Information**

**New password**

**Confirm new password**

[Change Password](#)

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

# P3 Registration

[aeptexas.p3.enertrek.com](http://aeptexas.p3.enertrek.com)

**ENERTREK**

## Log In

Email address \*

Password \*

Remember me

**Log in**

[Forgot password?](#)

[Need help getting started?](#)

Log in with

**g** Google

**f** 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 containing "Mike"
- Text input field containing "Evans"
- Text input field containing "mikevans@gmail.com"
- Text input field containing "....."
- Text input field containing "Confirm password \*"
- Dark blue button labeled "Sign up"
- Text below the button: "By signing up, you agree to the [Terms of Use](#)."
- Text below the button: "[Need help getting started?](#)"
- Text at the bottom: "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](#)

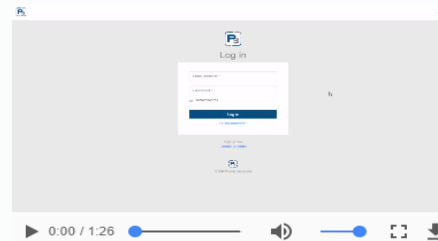
★ New P3 users can also access our P3 video tutorials by clicking the “Need help getting started?” link on the login page.

### Getting Started with P3

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

#### P3 Registration Process Video Tutorial

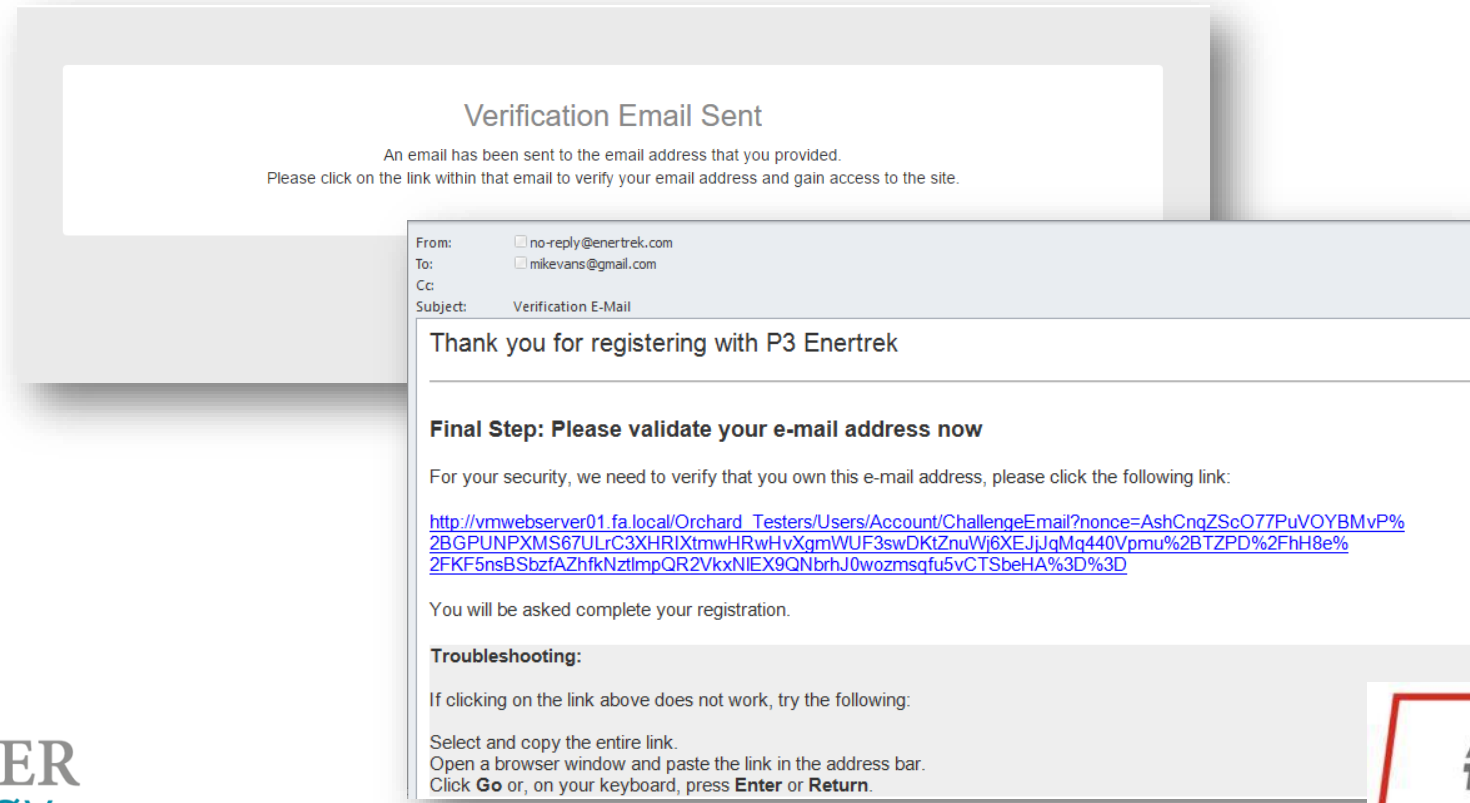
See how easy it is to use P3. Watch our Registration tutorial below to get started.



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







# 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
- ★ 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 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 part of 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 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 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".

# 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. The user's email address, mikevans@gmail.com, is displayed in the top right corner. Below the navigation bar, there are two tabs: PROGRAM LIST and ENROLLMENTS. The ENROLLMENTS tab is active, showing the Enrollment Details for a Residential Solar Program. The details include the Enrollment ID (20058), Submission Start time (1/23/2016 12:00:00 AM), Created date (10/28/2016 by M.Evans), Submitted status, and Current Status (Created). To the right, there is a Market Actor Information Summary for Evans HVAC, including the Company Name, Company DBA, Contact Name (Mike Evans), Phone number ((555)555-5555), and Physical Address (123 Main Street Austin, TX 78746). A link to View Company Profile is provided. Below the details, there is an Enrollment Form section.

# 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](http://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

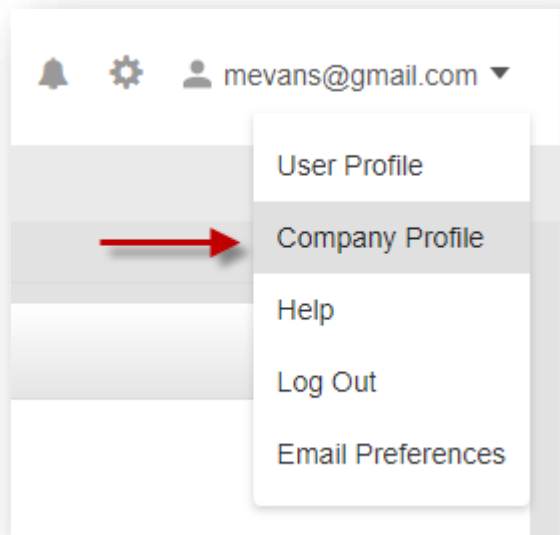
The screenshot displays a web application interface for managing P3 enrollment applications. At the top, there is a navigation bar with icons and labels for HOME, DASHBOARD, PROGRAMS (which is the active page), and PROJECTS. A user profile icon shows the email address mikevans@gmail.com. A green notification banner at the top center 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 side of the enrollment list, there are buttons for "Print", "Excel", and "CSV". The main content is a table titled "Program Enrollments" with the following data:

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

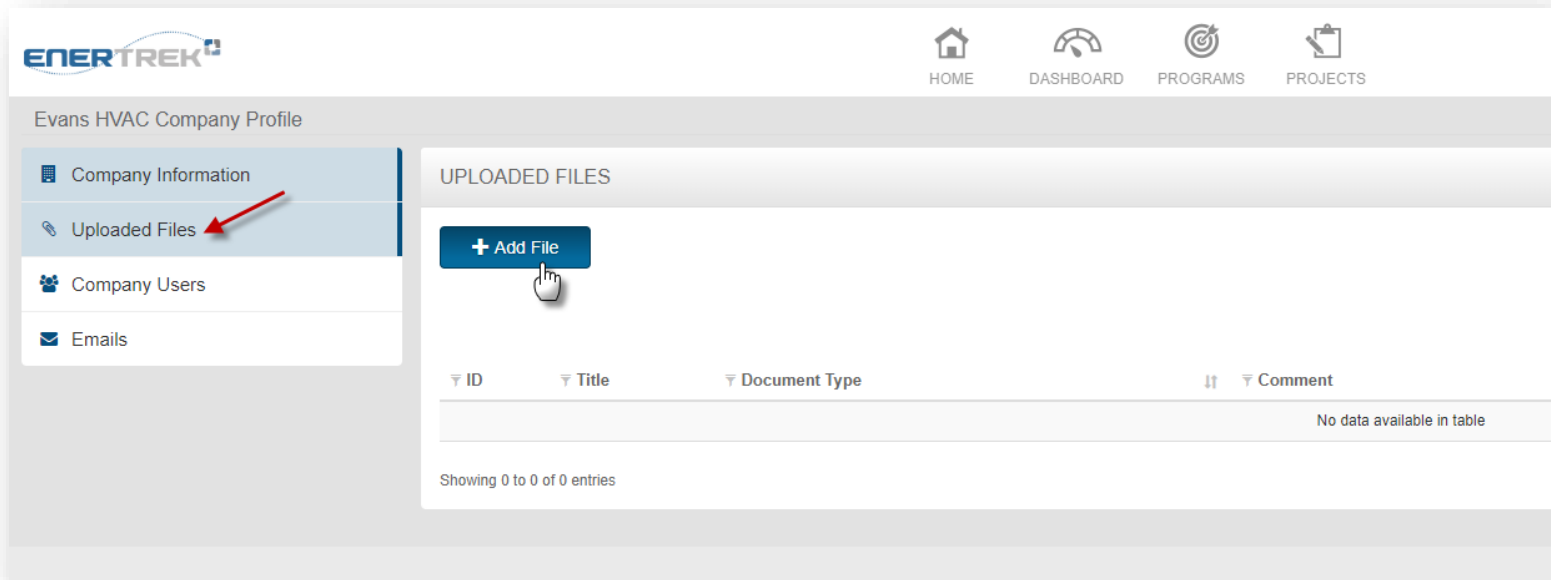
The Company Profile section is where Market Actors will upload certifications, licenses, W9s and any other required documentation relating to their Enrollment Application



- ★ 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

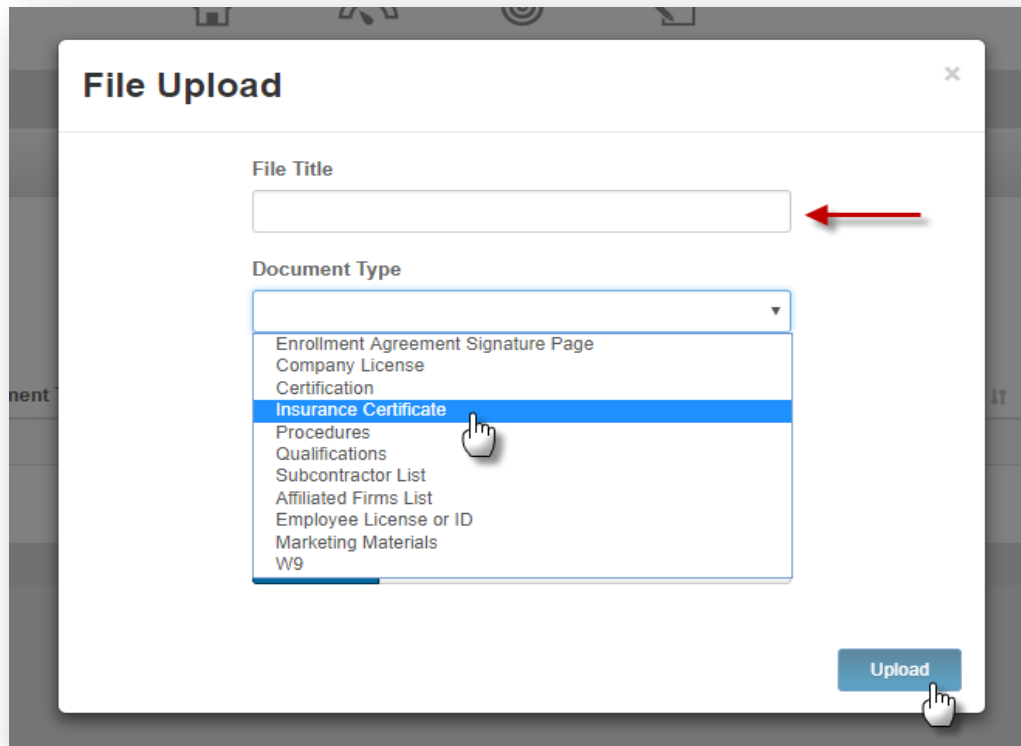


★ Five (5) files you will need to upload at the Enrollment application stage:

- ★ 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](mailto: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, reset your old password using the Forgot Password function, your old Market Actor profile will still be there. You can update any information if necessary.
- 2. 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).

**Complete these tasks by December 17, 2021,  
we will get back to you with next steps.**

# Thank You!



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

P3 user questions: **Tracie Cooper**, [tcooper@frontierenergy.com](mailto:tcooper@frontierenergy.com), 737-236-0246

**Also:**

**Steve Wiese**, [swiese@frontierenergy.com](mailto:swiese@frontierenergy.com), 737-236-0255

**Melissa Proske**, [maproske@aep.com](mailto:maproske@aep.com)

