



An **AEP** Company

2025 Commercial Standard Offer Program

This section includes information about the eligibility requirements, incentive payments, and participation process of the AEP Texas Commercial Standard Offer Program. This information is also available on the program Web site:

[Commercial Standard Offer Program – AEP Texas Energy Efficiency \(aep.com\)](https://aep.com/energy-efficiency/aep-texas-commercial-standard-offer-program)

Enrollments and Applications are completed at:

<https://aeptexas.p3.enertrek.com/>

I Program Description

Overview

The Commercial Standard Offer Program (CSOP) was developed by AEP Texas to provide incentives for new construction and retrofit installation of a wide range of measures that reduce demand and save energy in eligible non-residential facilities. Incentives are paid to energy service providers, known as Market Actors, based on deemed savings or verified demand and energy savings at eligible Commercial customers' facilities. This program has been developed to comply with the Energy Efficiency Rule §25.181 implementing Senate Bill 7 (1999).

Participants in the CSOP must meet minimum eligibility criteria, comply with all program rules and procedures, submit documentation describing their projects, and enter into a Standard Offer Program Agreement with AEP Texas. This document summarizes eligibility requirements, incentives, the participation process, and other information needed to successfully take part in this program.

Eligibility

Market Actor

Any entity that plans to install eligible energy efficiency measures at a facility with non-residential electricity distribution service provided by AEP Texas is eligible to participate in the CSOP as a Market Actor. Eligible Market Actors may include:

- National or local energy service companies (ESCOs)
- Local contractors
- National or local companies that provide energy-related services or products (such as lighting or HVAC equipment)
- Retail electricity providers (REPs)
- Individual customers that install measures in their own facilities.

To ensure that the program's incentive budget is allocated to projects that are likely to meet with success, all Market Actors will be required to demonstrate a commitment to fulfilling program objectives and competency in completing the proposed project. Market Actors will be required to submit the following information as part of the Enrollment and Application process:

- A description of the Market Actor firm, including relevant experience, areas of expertise, and references
- A work plan that covers the design, implementation, operation, and management of the project, including a work schedule

To ensure that incentives are available to multiple participants, Market Actors may be limited on the total amount of incentives received from the program incentive budget for a given year. An individual/Market Actor can be a party to multiple applications if the total incentive from all such applications does not exceed the maximum limitation.

Host Customer

Any eligible Commercial AEP Texas distribution customer who owns or operates a site may host a project developed by a qualified Market Actor or choose to sponsor the project independently. Ineligible customers include customers taking service at transmission voltages and customers that have submitted a valid "Energy Efficiency Identification Notice Form for Distribution Voltage Industrial Customers." The host customer's responsibilities include the following:

- Committing to an energy efficiency project
- Entering into an agreement with the selected Market Actor (or AEP Texas for independently sponsored projects)
- Providing reasonable access to project facilities both before and after project completion

Project

A project is defined by the set of measures at an eligible AEP Texas commercial distribution customer site and the estimated demand and energy savings included in a single application. All projects must meet the following requirements:

- Each project must include a total estimated summer or winter peak demand reduction and/or annual energy savings that results in at least \$500 in energy efficiency incentives. This limitation is included to ensure that projects contribute to the primary program goal of reducing summer/winter peak demand and/or energy savings and to minimize administrative costs.

Projects that include a comprehensive range of measure types are especially encouraged.

Measure

Most energy efficiency measures in retrofit applications and new construction that reduce electric energy consumption and summer, or winter peak demand are eligible for the CSOP. AEP Texas does not specify eligible measures in order to provide Market Actor maximum flexibility in packaging services. Therefore, Market Actors may propose the inclusion of any measure that:

- Produces a measurable and verifiable electric demand reduction during the peak summer period (defined as weekdays, between the hours of 1 p.m. and 7 p.m. from June through September, excluding holidays) or the peak winter period (defined as weekdays, between the hours of 6 p.m. and 10 p.m. and 6 a.m. and 10 a.m. from December through February, excluding holidays) and produces electric energy savings

- Produces savings through an increase in energy efficiency or a substitution of another energy source for electricity supplied through the transmission grid
- Is installed in a new or retrofit application
- Complies with the requirements of the Public Utility Commission of Texas' Texas Technical Reference Manual (TRM) Version 11.0, or a more current version if available

Measure types *excluded* from consideration in the program are those that

- Involve plug loads (i.e., office equipment, lamps)
- Involve self-generation or cogeneration, except for renewable technologies for on-site use
- Rely on changes in customer behavior and require no capital investment
- Result in negative environmental or health effects
- Involve fuel-switching *to* electric
- Receive an incentive through any other energy efficiency program offered by AEP Texas

Project incentives will be paid only for energy and demand savings directly related to end-use equipment installed under the project. Savings due to interactive effects between lighting and space-cooling measures will be eligible for payment based on a stipulated value only in cases where lighting measures have been installed in a conditioned space as part of the program. Interactive effects between other end-use equipment will not be eligible for program payments.

Table 1 provides examples of eligible and ineligible measures. AEP Texas may consider any measures that are not listed in Table 1 for program eligibility on a case-by-case basis.

Table 1
Examples of Eligible Measures and Projects

Commercial HVAC Measures

- Constant air volume to variable air volume conversion projects
- Chiller replacement projects
- Thermal Energy Storage
- Packaged cooling unit replacement projects
- Replacement HVAC projects increased by more than 20% will be treated on a case-by-case basis

Air-side & Water-side Economizer

- Fan and pump variable-speed drive installations
- Fan and pump motor efficiency upgrades
- Fuel switching *from* electric to gas

Commercial Lighting Measures

- High-efficiency fluorescent, HID or LED lighting that replaces less efficient lighting
- Lighting controls to reduce operating hours

Refrigeration Measures/Projects

- Air cooling and refrigeration compressor replacement projects

Industrial Measures/Projects

- Variable speed drive installations on industrial fans and pumps
- All motor-efficiency upgrade projects

HVAC & LIGHTING

- VFDs on Air Handler Supply Fans
- Demand Savings Power Adjustment Factors for Lighting Controls
- Occupancy Controls for Guestroom, Dormitory and Multifamily

Refrigeration (retrofit)

- Night Covers for Open Refrigerated Cases
- ECM Evaporator Fan Motors
- Door Heater Controls
- Solid & Glass Door Reach-Ins
- Strip Curtains
- Zero Energy Doors
- Evaporator Fan Controls
- Electric Defrost Control

Food Service

- High Eff. Electric Convection Ovens
- High Eff. Electric Combination Ovens
- ENERGY STAR Commercial Dishwashers
- ENERGY STAR Electric Steam Cookers
- ENERGY STAR Kitchen Electric Fryers
- ENERGY STAR Commercial Electric Hot Food Holding Cabinets
- Vending Machine Controls
- Pre-Rinse Spray Valves

OTHER MEASURES

- Window Treatment
- Pump-off Controllers
- Evaporative Pre-cooling
- Commercial Pool Pumps
- Energy Star Thermostats
- Door Air Infiltration

Examples of Ineligible Measures and Projects

- Fuel switching to electric
- Load reductions caused by building vacancies, decreased production, or other changes in occupant characteristics or behavior
- Measures that require no capital investment
- Measures that decrease building plug loads, such as “Green Plugs” or computer inactivity time-out controls
- Measures for which incentives were received under another AEP Texas program
- Energy-efficient gas-only measures

Measure Category	Measure Description	New Construction	Retrofit	Savings Calculator
Lighting	Lighting - Lamps and Fixtures	✓	✓	Lighting Survey Form
Lighting	Lighting Controls	✓	✓	Lighting Survey Form
HVAC	Package and Split-System (AC & Heat Pumps)	✓	✓	ACE Tool
HVAC	Chillers	✓	✓	ACE Tool
HVAC	Package Terminal Units and Room Air Conditioners (AC and Heat Pumps)	✓	✓	ACE Tool
HVAC	VFDs on AHU Supply Fans		✓	Other Measures Calculator
Building Envelope	Cool Roof		✓	Cool Roof Calculator
Building Envelope	Window Films		✓	Other Measures Calculator
Food Service	High Efficiency Electric Combination Ovens	✓	✓	Other Measures Calculator
Food Service	High Efficiency Electric Convection Ovens	✓	✓	Other Measures Calculator
Food Service	ENERGY STAR® Commercial Dishwashers	✓	✓	Other Measures Calculator
Food Service	ENERGY STAR® Commercial Electric Hot Food Holding Cabinets	✓	✓	Other Measures Calculator
Food Service	ENERGY STAR® Kitchen Electric Fryers	✓	✓	Other Measures Calculator
Food Service	Pre-Rinse Spray Valves		✓	Other Measures Calculator
Food Service	ENERGY STAR® Electric Steam Cookers	✓	✓	Other Measures Calculator
Refrigeration	Door Heater Controls		✓	Other Measures Calculator
Refrigeration	ECM Evaporator Fan Motors		✓	Other Measures Calculator
Refrigeration	Electronic Defrost Control		✓	Other Measures Calculator
Refrigeration	Evaporator Fan Controls		✓	Other Measures Calculator
Refrigeration	Night Covers for Open Refrigerated Cases		✓	Other Measures Calculator
Refrigeration	High-Efficiency Solid & Glass Door Reach-in Cases	✓	✓	Other Measures Calculator
Refrigeration	Strip Curtain - Walk-in Cooler/Freezer	✓	✓	Other Measures Calculator
Refrigeration	Low/No Anti-sweat Heat Glass Doors (Zero Energy Glass Doors)	✓	✓	Other Measures Calculator
Miscellaneous	Vending Machine Controllers		✓	Other Measures Calculator

Efficiency Standards

AEP Texas has designed the CSOP to encourage electric energy efficiency improvements that go above and beyond the efficiency gains typically achieved in retrofit or replacement projects. Consequently, energy and demand savings credit will be based only on reductions that exceed current state and federal minimum efficiency standards, if such standards apply. In cases where standards do not exist, savings credit will be based on improvements relative to a customer's energy use prior to participating in the program. A list of federal and state equipment efficiency standards is provided in the most recent version of the TRM.

Incentives

Each year, throughout the course of the program, AEP Texas will determine the total incentive funds available within each participating service territory. The incentive rates and payments are summarized below.

Rates

The CSOP provides standard incentive rates for demand and energy savings of \$200.00/kW for peak demand reduction and \$0.07/kWh for energy saved. Higher incentives are available for approved HVAC equipment (i.e. DX A/C units, Water Chillers, Heat Pumps) projects. Demand savings from M&V projects must follow the current TRM M&V (Vol. 4) procedures. Energy savings are defined as energy savings over the course of one 12-month period. Savings will be either "deemed"—that is, stipulated through standardized savings values or formulas—or determined through measurement and verification (M&V).

	\$/kW	\$/kWh
HVAC	\$350.00	\$0.09
All Other Measures	\$200.00	\$0.07

Limitation – maximum Market Actor incentives

To ensure that incentives are available to multiple energy efficiency service providers, no Market Actor may initially reserve nor receive more than the defined Market Actor maximum, if, and until the program manager adjusts the amount during the program year.

	CSOP Budget	Market Actor Limit
TCD -ESIID Prefix -100327894	\$1,616,500	\$325,000
TND -ESIID Prefix -102040497	\$262,262	\$50,000

Payments

AEP Texas agrees to make incentive payments to Market Actor based upon the sum of the documented Deemed Savings or Measured Savings derived from the Project. The total incentive payments due to Market Actor will be calculated by multiplying the Deemed Savings or Measured Savings by the applicable "Incentive Rate."

In most circumstances, AEP Texas will not make a total incentive payment that is more than 100% of the total estimated incentive payment specified in the CSOP Agreement. The total incentive payment may be less than the payment estimated in the agreement if the M&V activities or post-measure installation inspections indicate that the measured savings are less than the estimated savings.

Special Incentive Cases

Projects involving fuel switching measures are subject to limitations on their total incentive payment.

Project Application

Market Actors begin the Project Application process by creating an Enrollment on-line in the P3 database system for AEP Texas projects at <https://aeptexas.p3.enertrek.com>. The Project Enrollment/Application shall contain the following information:

- Identification and Qualifications of the Market Actor.
- Market Actor's W-9
- Customer's W-9 if receiving the incentive payment
- Identification of the host AEP Texas commercial customer site(s) including the ESID number(s).
- Description of the proposed set of energy-efficiency measures and associated incentives requested.
- Brief work plan for project design, implementation, operation, and management, including the anticipated project timeline.

Project Applications will be reviewed on a first-come, first-served basis until all incentive funding has been committed. A third (3rd) party Market Actor must submit the Market Actor and Customer Agreement with the Project Application submittal. Incentives will not be reserved or paid on projects that have started or are complete at the time the application is submitted or until the pre-inspection is conducted.

Pre-Installation Inspection

After receiving the Project Application, AEP Texas may, at its sole discretion, conduct a pre-installation inspection of the project site or plans to verify the baseline conditions documented in the application and the feasibility of installing the proposed equipment. AEP Texas will contact the Market Actor and complete the inspection, typically, within 30

business days of the receipt of a complete Project Application. The pre-installation inspection requires the presence of at least one representative of the Market Actor familiar with the project and the facility so that any discrepancies can be identified simultaneously by all parties. The inspection will verify the following information:

- The accuracy of the equipment survey. Equipment should be entered on the survey form in a manner that allows for easy identification of the location of the equipment. **For example on a Lighting Survey Form, all fixtures should be entered by room or area and not just a total fixture count for the project including non-qualifying fixtures in the area being retrofitted.** Rebranded LED lamps and fixtures that are not certified and listed by at least one of the following organizations: DesignLights Consortium (DLC), ENERGY STAR®, or Lighting Design Lab (LDL) will not be eligible for incentives.
- For most measures the accuracy of the equipment quantity and nameplate information is verified. For lighting measures, the requirement for acceptance is that the total error of the installed demand of the sample must be within $\pm 5\%$ of the total demand submitted on the survey form.

When electrical measurements are necessary, the representative(s) is required to perform any necessary disruptions in equipment operation, the opening of any electrical connection boxes, or the connection of current and power transducers. If the pre-installation inspection cannot be completed in a timely manner because the representative(s) is unfamiliar with the facility or project, the project site will fail the inspection.

Commercial Standard Offer Program Agreement

The Market Actor shall execute a CSOP Agreement and AEP Texas must receive this executed Agreement within fifteen (15) business days of the Project Application approval. The Market Actor is required to sign the contract with AEP Texas before installing any measures. The terms of the contract will be standard for all Market Actors, and will include the measures to be installed, estimates of demand and energy savings, a maximum incentive payment associated with the project, and the approved M&V approach.

Final Approval Request/Installation Report

The Market Actor must submit a Project for Final Approval/Installation Report (FA/IR) to AEP Texas within fifteen (15) business days from measure installation. A third (3rd) party Market Actor must submit the Customer Acknowledgement Form with the FA/IR. The FA/IR contains a detailed description of the energy-efficient equipment actually installed, invoices for the equipment including quantity, manufacturer, and model numbers, photos of existing and new equipment, and the operating conditions at the customer's site. A typical review cycle, including the inspection, for FA/IRs is 30 business days.

Post-Installation Inspection

AEP Texas will contact the Market Actor and may conduct a post-installation inspection of the project site within 30 business days of the receipt of a complete FA/IR. The post-

installation inspection requires the presence of at least one representative of the Market Actor familiar with the project and the facility. The inspection shall verify that:

- The savings measures specified in the CSOP Agreement have been installed and are operating as described in the approved Project Application. For most measures the accuracy of the equipment quantity and nameplate information is verified. For lighting measures, the requirement for acceptance is that the total error of the installed demand of the sample must be within $\pm 5\%$ of the total demand submitted on the survey form.
- The M&V plan is being followed in accordance with the approved Project Application.

When electrical measurements are necessary, the representative(s) is required to perform any necessary disruptions in equipment operation, the opening of any electrical connection boxes, or the connection of current and power transducers. If the post-installation inspection cannot be completed in a timely manner because the representative(s) is unfamiliar with the facility or project, the project site will fail the inspection.

Measurement and Verification

Before the incentive payment is made, the potential for the project measures to save demand and energy must be verified and the actual savings estimated. These activities will be conducted in accordance with the M&V plan developed for the project. Market Actors are responsible for developing their own M&V plans conducting all M&V activities for the project.

M&V procedures will vary in detail and rigor depending on the measures installed. For each installed measure, the chosen procedures will depend upon the predictability of equipment operation, the availability of evaluation data from previous programs, and the benefits of the chosen M&V approach relative to its cost.

Project-specific M&V procedures may be classified according to three distinct approaches that represent increasing levels of detail and rigor.

- **Deemed savings:** Savings values are stipulated based on engineering calculations using typical equipment characteristics and operating schedules developed for particular applications, without on-site testing or metering. This approach can be used only for measures for which savings are relatively certain, such as Lighting Efficiency and Controls, HVAC replacements, Commercial Refrigeration, and Food Service Equipment, and any other measure savings approved by the Public Utility Commission of Texas.
- **Simple M&V:** Savings values are based on engineering calculations using typical equipment characteristics and operating schedules developed for particular applications, with some short-term testing or simple long-term metering. For example, chiller energy and demand savings can be determined using the simple approach by comparing rated efficiencies of high-efficiency equipment to standard equipment, and using kW spot-metering and simple long-term kWh metering.

- **Full M&V:** Savings are estimated using a higher level of rigor than in the deemed savings or simple M&V approaches through the application of metering, billing analysis, or computer simulation. These methods will need to be developed in accordance with the International Performance Measurement and Verification Protocol (IPMVP), which represents the starting point for standard industry practice. More information about the IPMVP may be found on the Internet at www.ipmvp.org. Using the IPMVP as a guide, AEP Texas has developed several measure-specific guidelines to help ensure consistency and quality of the M&V performed by Market Actors. Market Actors will need only to adapt the guidelines to their specific projects in order to specify a project-specific M&V plan for the application stage.

The time required to complete M&V activities will range from less than a month to up to 12 months, depending on the approach chosen.

Savings Report

After all M&V activities are complete, the Market Actor shall complete a Savings Report (SR) documenting the projects measured demand and energy savings. An approved SR will serve as the invoice for the final incentive payment – the performance payment. This payment is based on the project’s verified savings. The total incentive payment cannot exceed the incentive payment stated in the CSOP Agreement. A typical review cycle for SR is 30 business days.

Deadlines

To encourage the timely completion of projects, the following deadlines have been established:

The Market Actor and Customer Agreement must be included in the Project Application submittal. CSOP Agreement must be received by AEP Texas within fifteen (15) business days of the Project Application approval.

Measure installation must be complete within six (6) months from the Effective Date.

The Final Approval Request/Installation Report (FA/IR) must be submitted within fifteen (15) business days from measure installation; extensions may be granted by AEP Texas on a case-by-case basis.

The Customer Acknowledgement Form must be included in the Installation Report (FA/IR) submittal.

The Savings Report must be submitted to AEP Texas within thirty (30) business days of the conclusion of M&V activities and within 18 months of the execution of the Standard Offer Agreement.

Correspondence

All Project Applications will be completed on-line at the CSOP web site. All supporting documentation will be uploaded in the P3 database under the applicable Project. Any

additional documentation or specific correspondence shall be submitted to the AEP Texas Program Coordinator listed below:

AEP Texas

Attn: Ed Villarreal
910 Energy Drive
Abilene, TX 79602
Phone: (325) 232-2347
E-mail: evillarreal@AEP.com

Confidentiality

The CSOP is subject to oversight by the Public Utility Commission of Texas (PUCT), which may request a copy of any program materials received by AEP Texas. Sensitive company and project information, such as financial statements, should be identified as “confidential” when submitted to AEP Texas. These materials will be treated confidentially, and will not be provided directly to outside parties other than the PUCT. AEP Texas will have no liability to any Market Actor or other party as a result of public disclosure of any submittals.

Participation Costs

AEP Texas will not reimburse any Market Actor for any costs incurred by participating in the CSOP, including costs of preparing the Project Application or reviewing the CSOP Agreement.

Submission of False Information

AEP Texas reserves the right to discontinue its evaluation of all submittals from any Market Actor who, in the sole judgment of AEP Texas, submits false, misleading, or incorrect information.

Web Site

The CSOP web site will serve as the primary sources for all updated program information and materials. The web site will include the following:

- Information that describes the program design and requirements
- Contact information to receive more information about the program
- Downloadable guidelines, applications, savings calculators, and submittal forms

[Commercial Standard Offer Program – AEP Texas Energy Efficiency \(aepxsaves.com\)](http://aepxsaves.com)



Enrollment Materials

This section provides information on enrollment materials for the AEP Texas Commercial Standard Offer Program, including the Project Application, Commercial Standard Offer Program Agreement, Installation Report, and Savings Report.

1 Registration

Overview

The first step to participating in the Commercial Standard Offer Program (CSOP) is to register on the P3 database.

Your company's Federal Tax ID number and W-9 will be required. If you do not have a Federal Tax ID number, then enter your Social Security Number. Market Actors can register at the website link listed below:

AEP Texas: <https://aep texas.p3.enertrek.com>

For a Market Actor to access the P3 database system and submit a Project Application, they must first register as a new or first-time user to create a Log In. This will include name, email address and password. A P3 Email Verification will be sent to verify the email address.

Market Actor Profile Information

This section requires Market Actor to enter information such as: tax ID, company name, contact name, address, title, phone & fax number, and email address.

Market Actor Enrollment

After the Profile information is completed, an Enrollment Application for the CSOP is completed with a statement of technical and managerial capabilities and experience; evidence the Market Actor and its subcontractors possess all applicable licenses, descriptions and references of other comparable projects. The Enrollment Application is submitted for approval by the Program Coordinator. When the Enrollment is approved, the Market Actor will be able to submit a Project Application. Once a Market Actor has an approved Enrollment, multiple projects can be submitted under the same Enrollment.

2 Project Application

Overview

The Market Actor is required to submit a Project Application for Pre-Approval to participate in the CSOP. In the Project Application, the Market Actor provides a detailed description of the proposed project, including precise descriptions of the project's energy efficiency measures, customer sites, and expected energy savings. In addition, the Market Actor is required to develop a plan for the measurement and verification (M&V) of the energy savings associated with the project if not using Deemed Savings. The following sections provide guidance on the completion of the Project Application.

Project Applications are accepted and reviewed by AEP Texas on a first-come, first-served basis until all funds are committed. A summary of the contents of the Project Application is provided below.

Sections of the Project Application

- Project Information
- Project Description
- Site Information
- Savings Calculation
- Estimated Schedule

Project Information

This section includes the project name (this will become the name of the project in the database and should include the name of the Host Customer), project type (new or retrofit) and space for additional comments.

Project Description

This describes the project, including energy efficiency measures and the activities that will be performed by the Market Actor.

Site Information

This section describes the customer site(s) including ESI ID number(s) in which measures will be installed along with the estimated peak demand and energy savings. The equipment survey forms described in the following sections provide a method to load savings information into the database.

Savings Calculation

This section describes how the Market Actor will calculate the estimated savings. Options include: stipulated/deemed savings, simplified M&V or full M&V.

Estimated Schedule

This section describes the estimated installation and M&V (if necessary) schedule.

Market Actor and Customer Agreement Form

This form must be signed by the Market Actor and the Host Customer and must be included with the Initial Project Application submittal. This form is not required for customers serving as their own Market Actor.

Measurement and Verification Plan

A detailed description of the measurement and verification plan(s) to be used for the project is required if applicable. In general, it is recommended that the Market Actor follow the requirements of the Public Utility Commission of Texas' Texas Technical Reference Manual (TRM) Version 11.0, or a more current version if available. However, the Market Actor can provide an alternative approach. This approach should be described in detail and is subject to the approval of AEP Texas.

Equipment Survey Forms

The program equipment survey forms have been provided as standard templates for Market Actors completing equipment audits for the Project Application. Regardless of the type of project, these forms should be used for all equipment information (nameplate data, operating schedule, etc.). The sections of the forms related to equipment energy consumption, however, are specifically designed for use with the *Simplified M&V Guidelines*. The forms available for use with this program are:

- *Lighting Survey Form* is used with projects that involve lighting efficiency and lighting control measures.
- *ACE Tool HVAC Equipment Survey* is used with projects that involve HVAC equipment.
- *Other Measures Calculator*
- *Motor and Variable Speed Drive Equipment Survey* is used with projects that involve motor or variable speed drive (VSD) measures.

In general, each form consists of multiple line items subdivided into the following three categories.

1. Equipment Information that describes general information about the equipment involved in new construction or retrofit applications. This information includes number of units, room location, unit identification, operating schedule, operating sequence, etc. This information must be completed for pre-installation and post-installation equipment.
2. Nameplate Information is used to identify specific information regarding the equipment to be retrofitted. It includes manufacturer, model #, capacity, etc. This information must be completed for pre-installation and post-installation equipment.
3. Energy Information is specifically designed for the *Simplified M&V Guidelines*. This information includes spot measurements, annual kWh measurements, and annual hours of operation.

Any equipment not specified in the survey forms must still be listed in the Project Application with enough information for AEP Texas' approval. Therefore, it is recommended that Market Actors work closely with AEP Texas when surveying equipment not specified in the forms.

Lighting Equipment Survey Form

The Lighting Equipment Survey Form (LSF) is provided to facilitate the completion of Project Applications that involve lighting measures. Each line item in the survey is used to record the lighting fixtures and controls in a single room or area. However, if multiple usage groups are present at a site, then the predominant use for the facility should be used as the Building Type to represent each different usage group or a separate LSF should be completed. Each line item consists of the following sections:

- *Building ID, Floor, and Room Description* identifies room locations. The drop boxes for Building Type and Air Conditioning type calculate fixture usage and air conditioning interaction. All the cells in this section are to be completed by the Market Actor. **The fixture counts should be entered into the form in a manner that the location of the fixtures is clearly defined. The form should be completed by area and not fixture type where all of the same fixture types are listed on the same line including non-qualifying fixtures.** A table under the Factor Tables tab of the form is used to determine the value of the coincidence factors, hours of operation, and power factor adjustment.
- The *Pre-Retrofit Equipment* and *Post-Retrofit Equipment* sections are for specific information about the lighting fixtures. All non-shaded cells require inputs from the Market Actor. The shaded cells, *kW per Fixture* and *kW per Space*, are equations and do not require inputs from the Market Actor.
- *Peak kW Savings* and *Annual kWh Savings* are equations, and do not require inputs from the Market Actor.

Motor and Variable Speed Drive Equipment Survey

The Motor and Variable Speed Drive Equipment Survey is provided to facilitate the completion of Project Applications that involve motor and/or VSD retrofits. Generally, each line represents an individual motor identified by its unique motor ID. However, if multiple motors have similar operating schedules and loads, then multiple motors can be placed on the same line. Each line consists of the following sections.

- The *Pre-Retrofit Equipment* and *Post-Retrofit Equipment* sections are for general information about the motors and the Project Application. All the cells in these sections require inputs from the Market Actor.
- The *Nameplate Data* sections (pre and post) are for specific information about the motors, and all the cells in these sections require inputs from the Market Actor.
- *Pre-Installation Energy Consumption* and *Post-Installation Energy Consumption* require inputs from the Market Actor for all non-shaded cells. The shaded cells are equations and do not require inputs from the Market Actor.
- The *Peak kW Savings* and *Annual kWh Savings* columns are calculated automatically and do not require inputs from the Market Actor.

ACE TOOL HVAC Equipment Survey

The ACE HVAC Equipment Survey Tool is provided to facilitate the Market Actors' application of the deemed savings calculations for cooling equipment for New and for Retrofit projects when the replacement equipment is within $\pm 20\%$ of the original equipment size. Market Actors who perform retrofits of cooling equipment or install cooling equipment in new construction projects may choose the deemed savings methodology for the measurement and verification of the peak demand and energy savings resulting from their project.

Other Measures Calculator

The Other Measures Calculator facilitates the completion of Project Applications that involve many new construction and retrofit measures for the following measure categories:

- Refrigeration
- Food Service Equipment
- Lodging Occupancy Controls
- VFDs of Air Handling Units
- Window Treatment
- Pump-off Controllers
- Evaporative Pre-cooling
- Commercial Pool Pumps
- Energy Star Thermostats
- Door Air Infiltration

Additional Documentation Uploads

- Executed Market Actor and Customer Agreement Form,
- W-9 for payee,
- Pictures of existing equipment,
- Drawings and blueprints for new construction projects,
- Proposed specification sheets for new equipment,
- Design Lights Consortium (DLC) screenshots of proposed, eligible LED lights showing the Technical Requirements Version,
- Any other documentation of the proposed work that is beneficial to the project evaluation.

3 **Standard Offer Program Agreement**

Overview

After a Project has been Pre-Approved, the Market Actor shall execute a CSOP Agreement and AEP Texas must receive this executed Agreement within fifteen (15) business days of the Project Application approval. The Market Actor is required to sign the Agreement with AEP Texas before installing any measures. The terms of the Agreement will be standard for all Market Actors, and will include the measures to be installed, estimates of demand and energy savings, a maximum incentive payment associated with the project, and the approved M&V approach. After the executed CSOP Agreement is returned to the Program Coordinator, the project will be moved to Work Completion Pending and work can be started.

4 Installation Report

Overview

The Market Actor is required to submit a Project for Final Approval within fifteen (15) business days from measure installation to notify AEP Texas that the installation is complete and the equipment is operating as specified in the approved Project Application and the project is ready for Post-Inspection. In the Final Approval/Installation Report, the Market Actor provides details of the actual equipment installed for the project, including updated information regarding savings estimates, pictures of new equipment, equipment invoices, and the M&V plan. After the Final Approval/Installation Report is approved, AEP Texas shall make the installation payment if the project does not require further M&V. See *Incentives* in Section I of the manual for details on the incentive payment. The following sections provide guidance on the completion of the Final Approval/Installation Report.

Sections of the Installation Report

- Project Description
- Site Information
- Savings Calculation

Each of these sections should be reviewed and revised with more detailed information if necessary.

Project Description

This section describes the project, including energy efficiency measures and the activities that were performed by the Market Actor. If the scope of the project has not changed since the approval of the Project Application, the Market Actor may refer to the Project Application when completing the project description.

Measurement and Verification Plan

If the M&V plan has changed significantly since the approval of the Project Application, the Market Actor must submit the revised plan. The M&V plan requires a detailed description of the updated M&V plan to be used for the project and is subject to the approval of AEP Texas.

Customer Site Profiles

The site profile should be completed for each site with demand and energy savings claimed in the project. Site schematics and additional site information should be provided as appropriate. If this information has not changed since the approval of the Project Application, the Market Actor may simply refer to the Project Application when completing this section.

Project Savings Estimate

The summary of the proposed measures should be completed along with all equations and calculations used to determine the demand and energy savings estimate. If this information has not changed since the approval of the Project Application, the Market Actor may refer to the Project Application when completing this section.

Equipment Survey Forms

Updated equipment survey forms must be completed if the actual equipment installed differs from the equipment listed in the approved Project Application. These forms should be used for all equipment information (nameplate data, operating schedule, etc.).

Customer Acknowledgement Form

This form certifies that the energy efficient equipment associated with the project has been installed and is properly commissioned. The Market Actor and the host customer must sign one form for each customer site involved in the project. This form must be included with the IR submittal and received by AEP Texas within fifteen (15) business days from measure installation. This form is not required if the customer serves as their own Market Actor.

5 Savings Report

The Market Actor must submit a Savings Report (SR) if the Market Actor has conducted specific measurement and verification activities associated with the project. The SR includes all measurement data and associated analysis conducted by the Market Actor.

The SR should be submitted to AEP Texas on-line and within eighteen (18) months of the Effective Date of the Agreement. In addition to completing the SR, Market Actor must submit the raw data, in electronic format only, supporting all savings calculations. After the SR is approved, AEP Texas shall make the performance payment; see *Incentives* in Section I of this manual for details on the performance payment.