AEP TEXAS

COMMERCIAL LOAD MANAGEMENT PROGRAM

USER GUIDE FOR PROJECT SPONSORS

Updated September 2024

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INTRODUCTION

The User Guide provides Project Sponsors in the AEP Texas Commercial Load Management Program with guidelines for registering as a new user, creating a sponsor profile, uploading documents, as well as creating and submitting sites. Specific screen shots and directions are given for the majority of form-types that will be seen within EnerTrek®, the online database tracking system.

AEP Texas Central Division and Texas North Division track their respective load management programs in separate EnerTrek® systems. To access the correct site, please use the following urls:

AEP Texas Central Division Load Management: https://www.ecurtail.com/AEP/TCC/

AEP Texas North Division Load Management: https://www.ecurtail.com/AEP/TNC

AEP Texas Distribution Account Number (ESI ID) numbers can be identified on the customer's electric bill as a 17 digit number, ex. ESI ID: 10032789400012345. Project Sponsors should look for the distinguishing number beginning with:

100327894 for AEP Texas Central Division

102040497 for AEP Texas North Division

When working with AEP Texas Commercial Load Management Program forms, a few principles should be observed:

- Unless specifically directed to use the browser's buttons, use the navigation buttons provided on the EnerTrek® 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 has been provided. 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 may 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 Load Management Programs is ***EnerTrek®,*** developed specifically for the various Load Management Programs being implemented by utilities. Henceforth, the online data tracking system will be referred to as EnerTrek.

NAVIGATION

➢ Each table has filters that can be viewed by selecting the minus ("-") sign next to the corresponding filter.

➢ Each table column can be sorted from ascending to descending order by selecting the column heading. Columns can also be moved to different positions in the table by dragging a column heading and dropping it in the table where you want it.

➢ Batch actions can be performed on several items at once using the Batch Actions dropdown menu.

➢ Once batch action has been selected, select the checkbox next to projects for which you want the batch action to affect and select the corresponding action button.

➢ The bottom of system tables offer a search function, page navigation, refresh button and Export to Excel function.
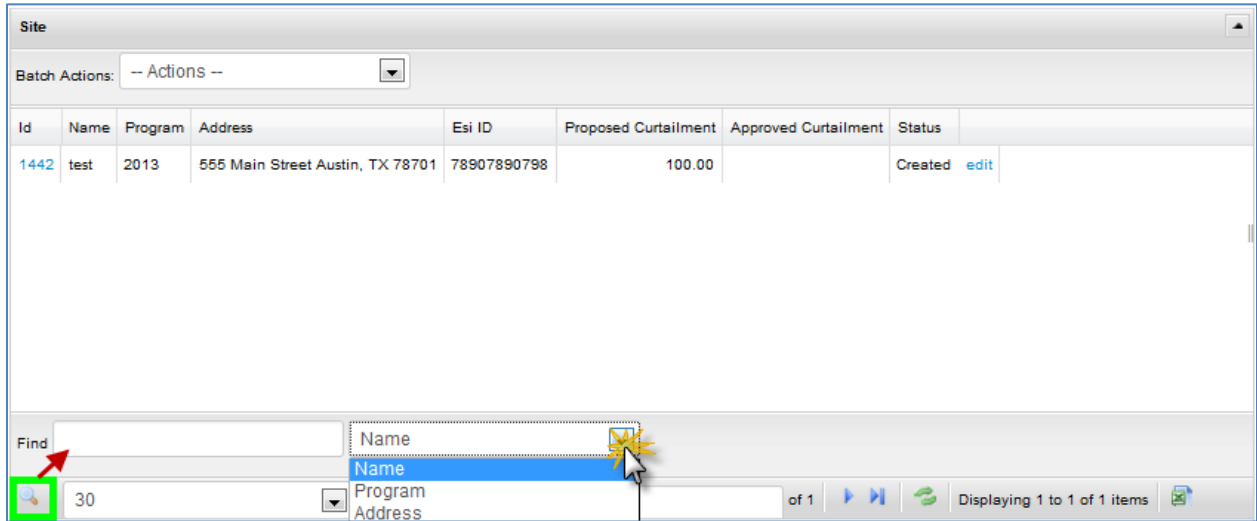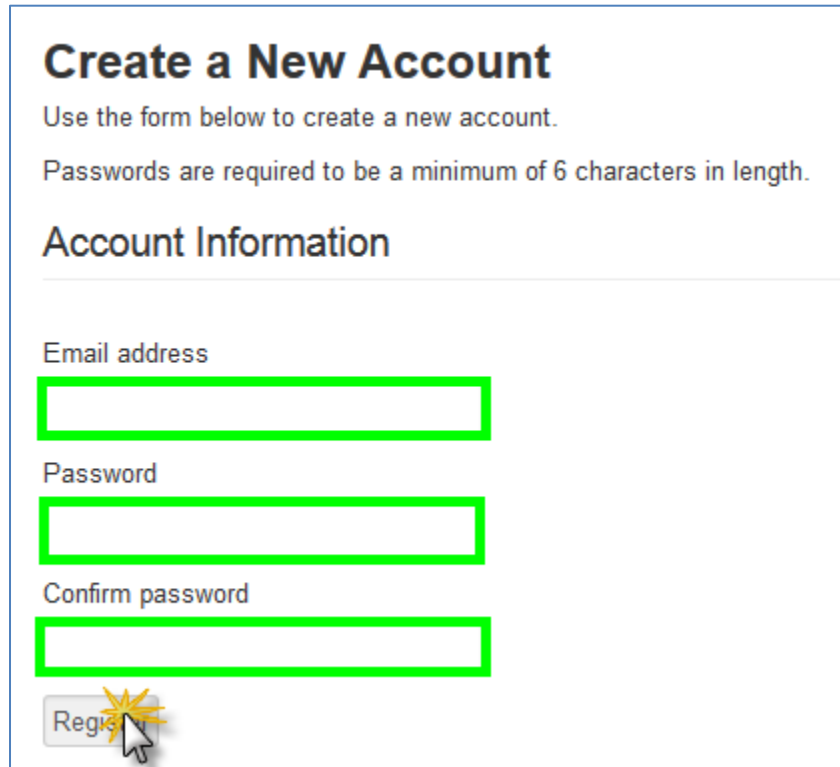
REGISTRATION

Register as a New User

➢ Select the ***Register*** link at the menu at the top of the Home page to create a new user account.
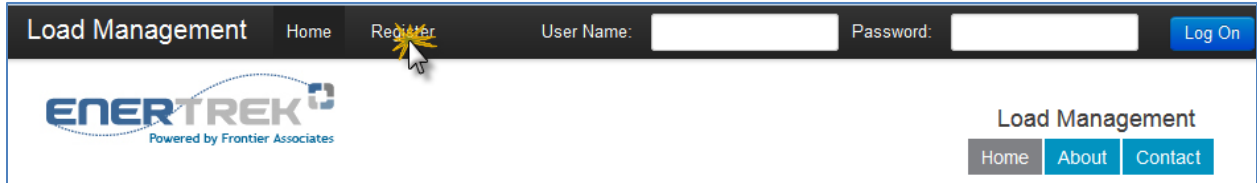
➢ Fill in appropriate text fields and select the ***Register*** button.

Lost Username or Password

If you have participated in either TCD or TND's programs BEFORE 2018 and you have previously registered in this program but may have forgotten your Username and/or password, please do the following:

➢ Send an email requesting an account reset to Alex Rivera at arivera@frontierenergy.com and cc the following:

- o For Texas Central Company and Texas North Company: Danny Trevino at dtrevino@aep.com

➢ In the subject line, add "AEP Texas TNC or TCC Load Management Account Reset Request"

➢ In the body of the email provide your full name, company name, phone number, email address (if different from the one the request is coming from), and the program for which you are trying to register

Edit User Account Information

➢ Select the *Account* link at the menu at the top of the page.

➢ Make changes to the appropriate user information fields.

➢ Select the corresponding *Update* button.

SPONSOR PROFILE

Create New Sponsor Profile

➢ Select the *Click here to create your profile* button.

➢ Fill in appropriate information and select the *Create* button.

Edit Sponsor Profile

➢ Select the ***Profile*** button at the menu at the top of the page.

➢ Make necessary edits to your sponsor information.

➢ Select the ***Save*** button at bottom left corner of the page.
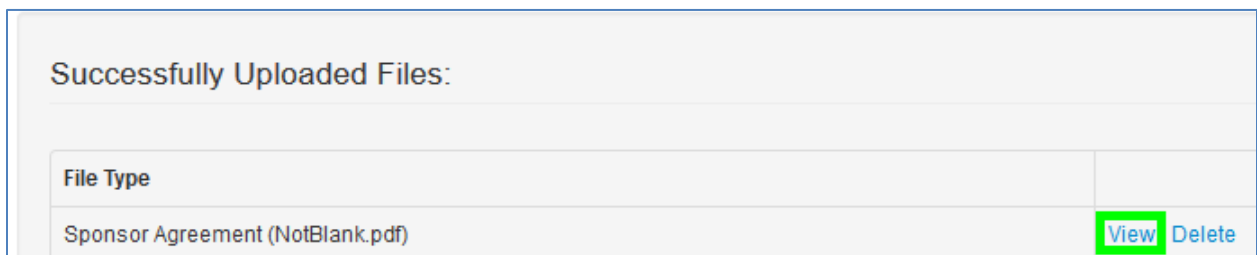
SPONSOR DOCUMENTS

Upload Sponsor Documents

➢ Select the *Documents* button at menu at the top of page.

➢ Select the appropriate document type from document dropdown menu titled "File Type:"

➢ Select the *Browse* button to select a document from your local computer.
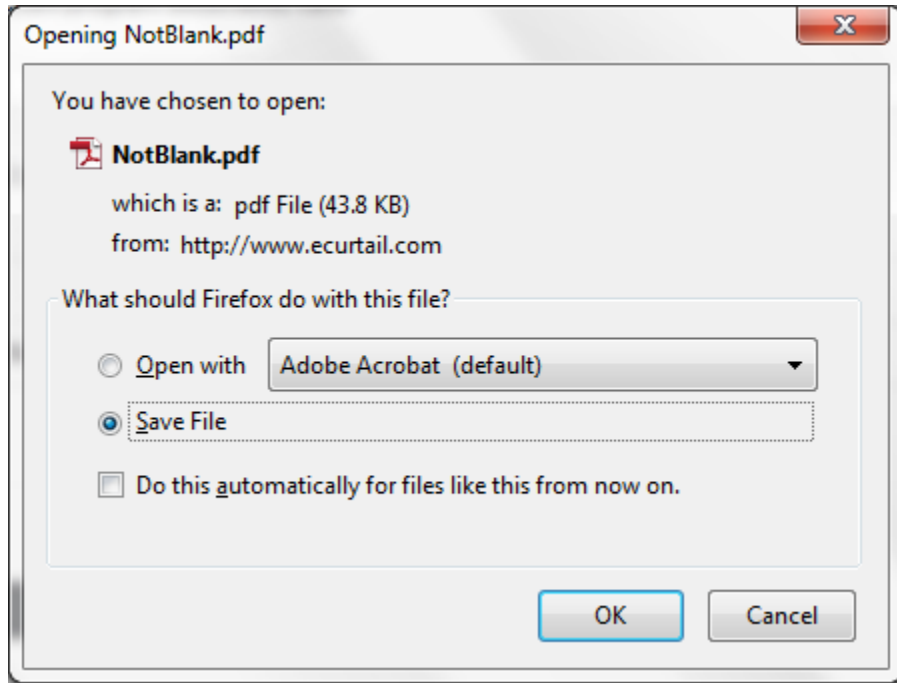
➢ Select the *Upload* button.
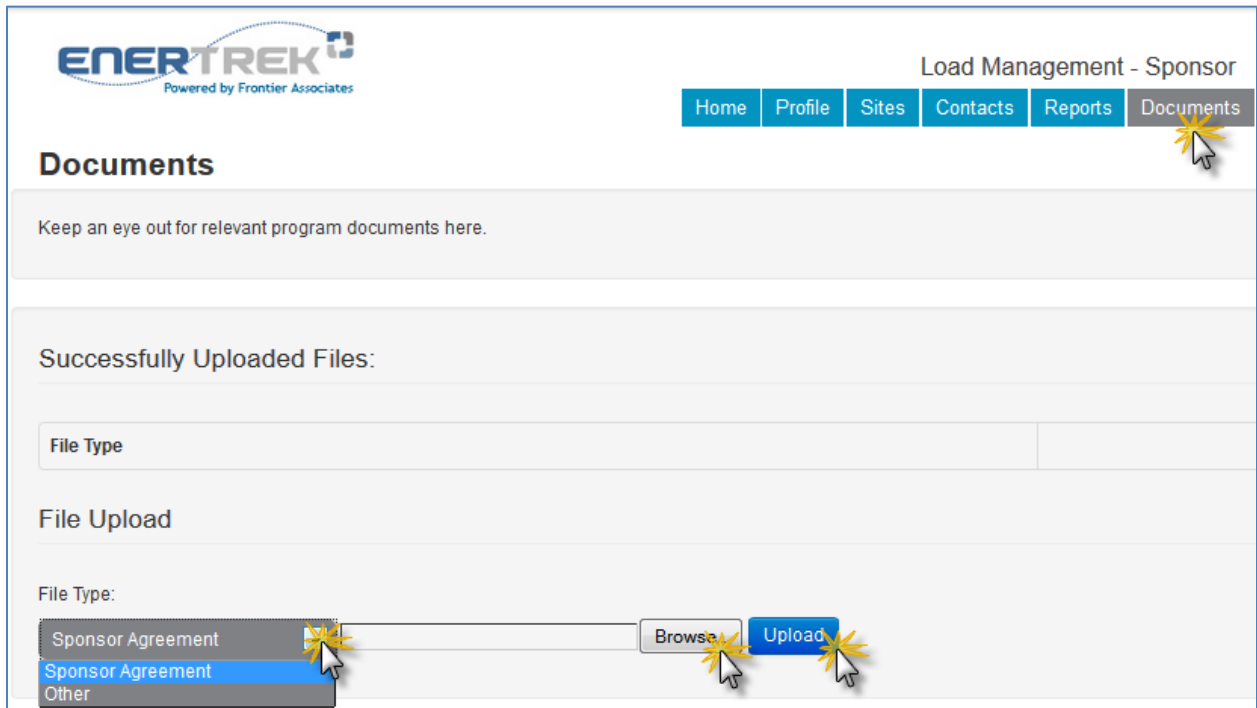
View/Download Sponsor Documents

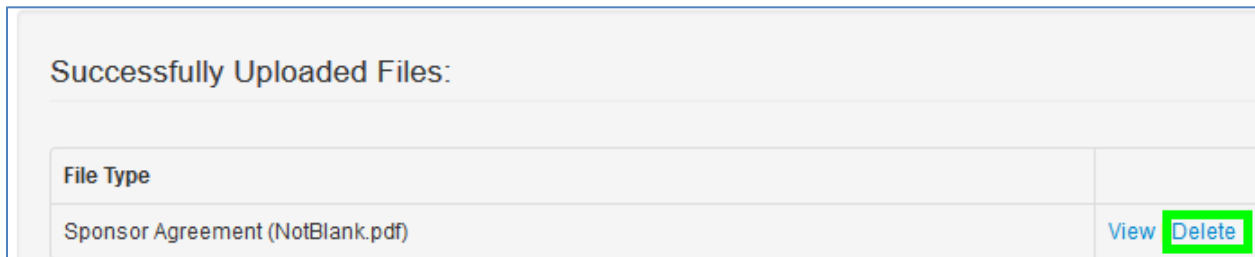➢ Select the *View* link next to appropriate document.

➢ Select the appropriate radio button and select the **OK** button.
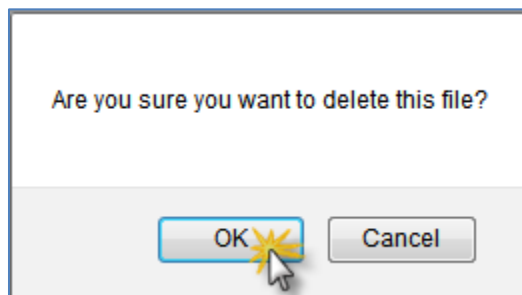

Delete Sponsor Documents
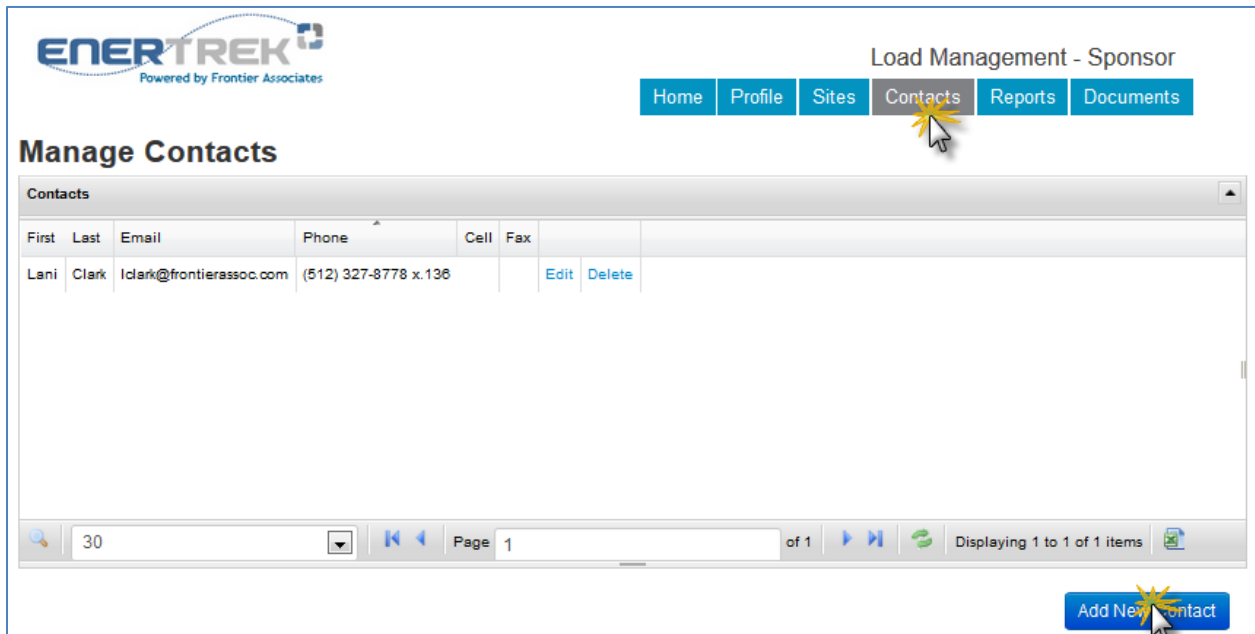
➢ Select the **Delete** link next to appropriate document.

➢ Select the **OK** button in the pop-up window.

SITE CONTACTS

Create New Site Contact

➢ **PLEASE NOTE**: You will automatically be added as the first contact in your contact list.

➢ Select the *Contacts* button at menu at the top of page.

➢ Select the *Add New Contact* button at bottom right corner of page.

➢ Fill in appropriate information and select the *Add* button.

Edit Site Contact

➢ Select the ***Edit*** button next to appropriate contact.

➢ Edit appropriate fields and select the ***Update*** button.
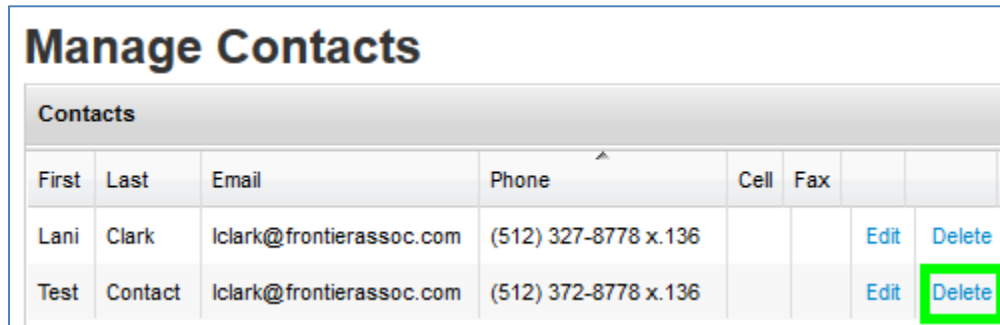
Delete Site Contact

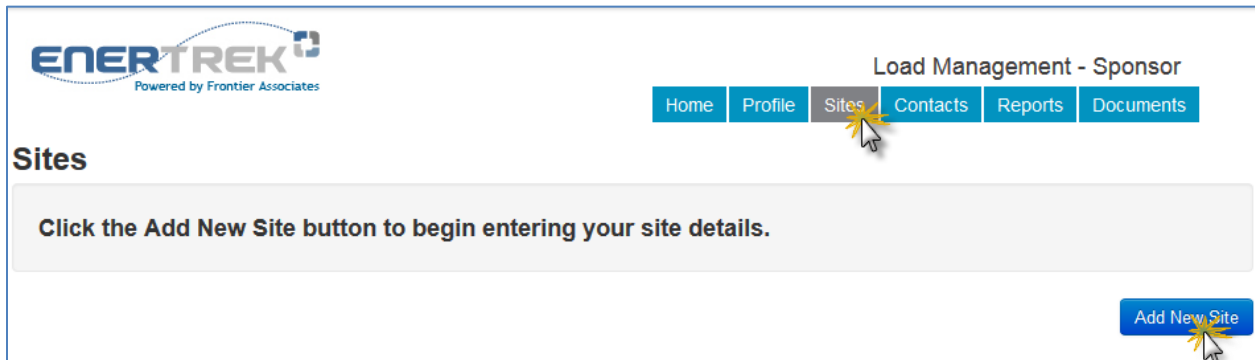➢ Select the **Delete** link next to appropriate contact.

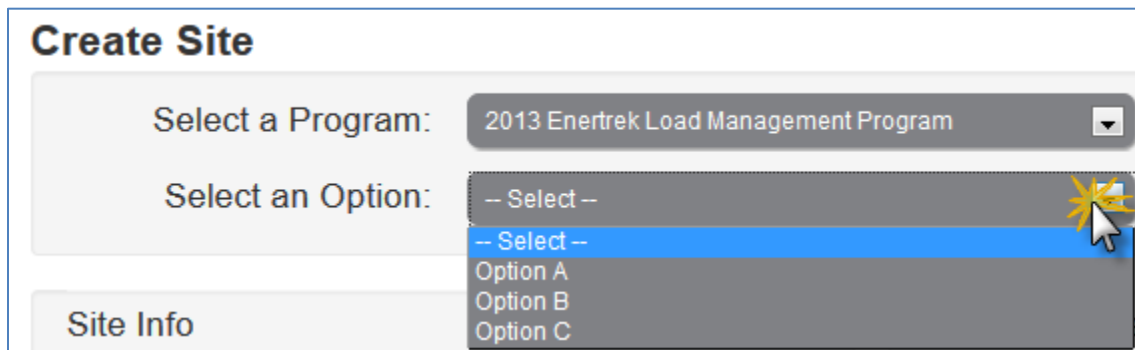➢ Select the **Delete** button in the pop-up window.
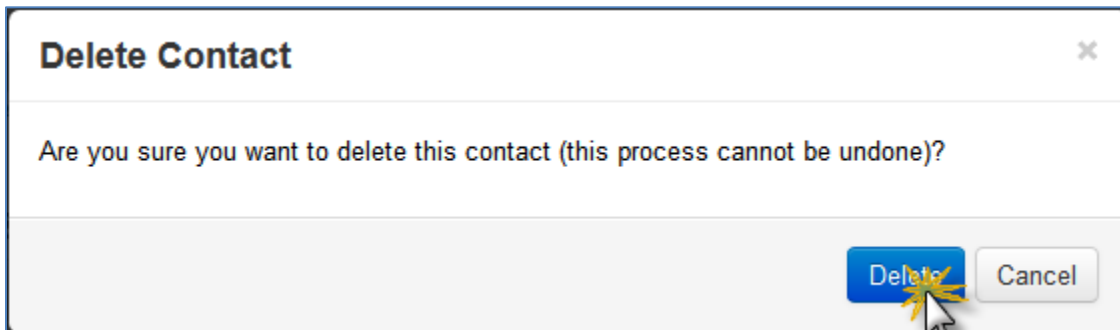
SITES

Add a New Site

➢ Select the *Sites* button from the menu at the top of the page.

➢ Select the *Add New Site* button.

➢ Select a Curtailment Option from dropdown list **(where applicable)**.

➢ Enter customer ESI-ID number into appropriate field and select the ***ESI ID Lookup*** button to prepopulate customer's address into appropriate fields.


➢ Fill in appropriate site information into the rest of the form.

➢ Select the ***Select Existing Contact*** button to populate contact information for persons already in your Contact List.

➢ Select the ***Add New Contact*** to populate information for person(s) not yet in your Contact List (new contacts added to a site will be automatically added to your Contact List).
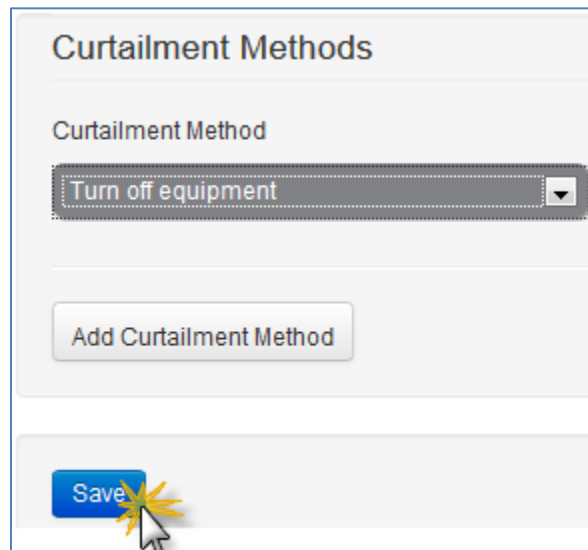
> ➢ Select the appropriate curtailment method(s) from the dropdown list at the bottom of the site form.
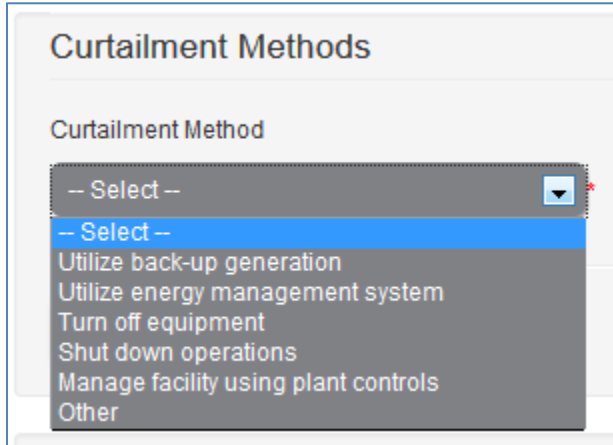
> ➢ Select the **Add Curtailment Method** button.
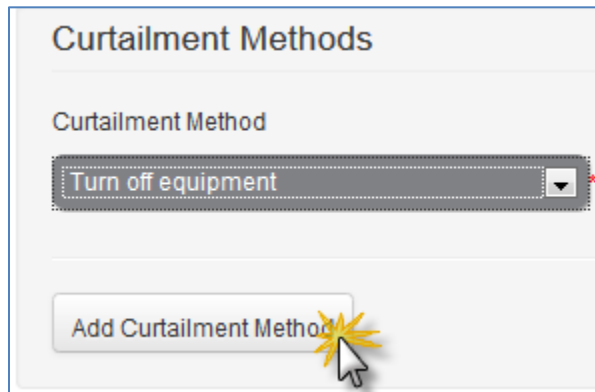
> ➢ Select the **Save** button to save site information.

Copy Site

➢ Select the *Sites* button from the menu at the top of the page.

➢ Select the *Copy Site* button.

Site							
Batch Actions:	-- Actions --						
Id	Name	Program	Address	Esi ID	Proposed Curtailment	Approved Curtailment	Status
1442	test	2013	555 Main Street Austin, TX 78701	78907890798	100.00	100.00	Approved edit
1443	test2	2013	777 Main Street Austin, TX 78701	543254254252	100.00		Created edit

Page 1 of 1   Displaying 1 to 2 of 2 items   Copy Site   Add New Site

➢ Select appropriate site to copy from pop-up window (selected site will be highlighted in blue once selected).

➢ Select *Copy Site* button.

Copy Site

Site					
Id	Name	Program	Address	Esi ID	Proposed Curtailment	Approved Curtailment
89	Kyle Test Site 1	2013	3036 WINDING MEADOW TRL PRINCETON, TX 75407	10400514694630001	200.00	200.00

Page 1 of 1   Displaying 1 to 1 of 1 items   Copy Site   Cancel

➢ Edit site information and select *Save* button.

Edit Site Information

➢ Select either the Site ID number link on the left side of the table OR select the edit link on the right side of the table next to the appropriate site.

Id	Name	Program	Address	Esi ID	Proposed Curtailment	Approved Curtailment	Status	
1442	test	2013	555 Main Street Austin, TX 78701	78907890798	100.00		Created	edit

Batch Actions: -- Actions --

Site

➢ Make appropriate changes and select the *Save* button at the bottom of the page.

File Upload

File Type:

Customer Agreement

Submit   Save

Upload Site Documents

➢ Follow the steps above to edit the appropriate site.

➢ Select the appropriate document type from the "File Type" dropdown menu.

➢ Select the *Browse* button and select the appropriate document from your local computer.

➢ Select the *Upload* button.

Submit Site

➢ Edit appropriate project (see instructions above).

➢ Select the **Submit** button at the bottom of the form.
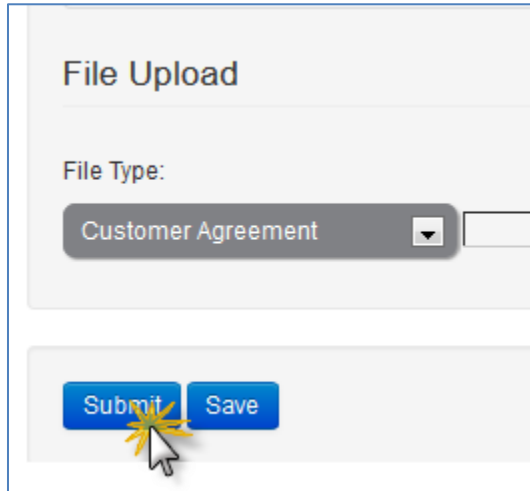
➢ You can also submit sites in batches. To do so, select the "Batch Action" dropdown menu and select the **Submit** option.

➢ Select the checkboxes next to the sites you want to submit and select the **Submit** button.