Welcome to the Small Business Program!

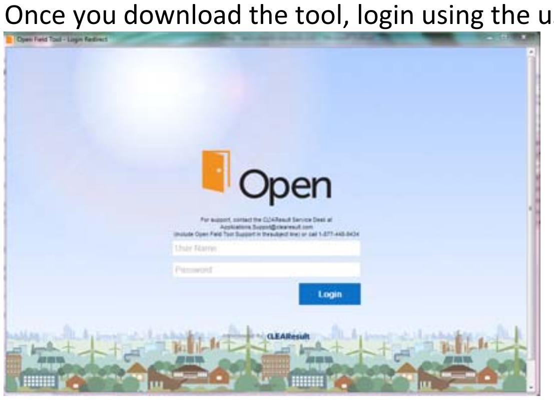
Please read the following email for tool installation instructions, Frequently Asked Questions and the project process.

To start, please go to https://applications.clearesult.com and install the Open Home Energy Solutions Software/Open 3 Client/Open 4 Client.

The password to install the tool is **hesopen**.

Install whichever version is appropriate, e.g., iOS for an iPad, or Windows for a windows laptop. The Open tool only works with iOS version 6.0 or later and Windows versions 7/8/8.1. It will not work for Android tablets.

Once you download the tool, login using the username and password provided to you.



Creating a new project:

- Account number: Make sure you have the account number or meter number. When you click 'Validate', if the account number is qualified, it will say 'eligible' and populate the address. If you have any concerns about whether the project will qualify or not, email your program contact and they can check the number.
    - SWEPCO LA account numbers are formatted as 11-digits as follows: XXX-XXX-XXX-X-X
        - Enter only the first 10 digits with no dashes
    - Entergy account numbers include a four zero prefix (0000)
        - Enter in the account number with 0000 if the account number is not validating (account number should look like 000012345678)
    - If the account number has dashes, remove the dashes before validating
  - A small business is one that is under 100 kW peak demand. You cannot find this information on a customer's bill. You can verify eligibility in the tool or by contacting your program representative.
- Email address: If the customer doesn't have an email address, enter a fake email address using the following format (BusinessName@utility.fake). **DO NOT** enter your own email address.
- Building type: Choose the building type that represents the building the best, regardless of the operating hours. If the building has more than one use, like a gas station with a small restaurant in it, choose the type that is the majority of the building.
- Operating hours: Operating hours are set by the utility and cannot be changed even if they are off what you estimate.

Entering measures:

- For the existing measure, if you can't find the exact existing bulb, choose the one that is closest and make a note at the bottom of the page.
- For LEDs, choose LED Fixture if you're using a fully integrated LED Fixture or an LED tube. Use LED Bulb for all single bulbs.
- For LED tubes, you will have to enter the amount of bulbs in the original fixture. For example, if you're replacing 5 T12, 4 bulb fixtures (20 total T12 tubes), you will need to enter 20 LED Fixtures (not LED Bulb) as a replacement. You can also add the wattage of the replacement LEDs for a one-to-one replacement.
- You are allowed to delamp.
- If you are removing a fixture, you can enter 0 for the replacement, or take one of the other replacement bulbs and put it in that measure. Do not enter a 2W LED Bulb or other low wattage replacement.

Summary page:

- Adjusting the project cost: If the cost generated by the tool doesn't match your cost, you can either add or subtract money from that cost by using the 'Cost Adjustment' box. Enter a number to add costs, or enter a negative sign (-) and a number to subtract.
- You can add other project costs, like a ladder rental, to 'Additional Non EE Costs'. Do not add a negative number to this box.

Proposal:

- In order to submit the project, the proposal will need to be signed. If you can't get a customer signature right away, click the 'Sign Proposal' button and add a dot (.) to the customer signature.
- Sign in the contractor signature box.

- It is recommended that the customer sign in the tool. If they want to sign in the tool later, please see instructions below on how to edit the project and obtain the signature
    - If they can't sign in the tool, see instructions below on how to save and print the PDF. The customer can sign the printed copy and you can return it to your program contact as well.

Submitting:
- After you finished entering the project, submit the project.
- The project will be inaccessible until your program contact reviews the project.
    - If the project does not have a signature, it will be moved to your Attention tab. You will be able to edit all projects in your Attention tab.
    - If it does have a signature, it will either be assigned to pre inspection (your first 5 projects) or will sit in your Pre tab until all of your pre pictures are submitted and you receive notice that you can begin construction on your project from your program contact.

Editing Projects
- You will only be able to edit projects in your Attention and Authorized tabs.
- To edit, click the blue 'Edit' button. You will only be able to edit by clicking into the project with this button. If you click on the project name to open, you will not be able to edit.
- Make your changes, click through the project with the 'next' button. Always review the proposal to make sure the changes are reflected. Resubmit the project.
- If you see a 'Submit' button instead of the 'Edit' button, they are the same and you'll be able to make edits. Click into the 'Submit' button, make your edits, and resubmit the project.
- If you have not gotten a customer signature and you want to get it signed in the tool, you can click into the edit button, go to the proposal page, click on 'clear signature' under the customer contact box, and click on 'sign proposal'. Have the customer sign in the tool and resubmit the project. Please notify your program contact when you do this so they know the project has been signed.

Printing/Emailing the Customer Proposal
- You can only print or email the customer proposal after the project has been submitted.
- To print the proposal, open the project in the tool and go to the proposal tab. Scroll to the bottom of the page and click on the button that says 'View PDF'. A box will pop up asking you to save the document. You will need to save the file as a PDF, so type .pdf after the file name (ex: Proposal.pdf). Go into the location where you saved it to open it. It should be ready to print.
- On an iPad, you have the option to email it to the address you entered for the customer. You can also save it and print it.
- Verify that your printed or PDF proposal matches the latest proposal in the tool. If not, resubmit your project to refresh the proposal, click back into your project and print again.

Submittal/Inspection Process
- Projects only have funding reserved if they are submitted with a signed proposal AND you receive email that funding has been reserved from your program representative.
- After the project is submitted with a signature, it will need to be pre inspected (if it's your first 5 projects) or you will need to send pre photos.
- If you need a pre inspection, your program contact will alert the inspector. The inspector will then contact you to set up a time for the inspection. After the inspection is complete and you receive notice that the project is approved for construction, you will have 60 days to complete the project. After the 60 days has passed, the project is subject to cancellation.

- If you send pre photos, you will have 60 days from the date that funding was reserved to complete the project. After the 60 days has passed, the project is subject to cancellation. Remember: Reserving funds is different than project approval. A project is only approved to begin construction when you receive notice that it is approved to begin construction.

Photos Needed

- For each project, we will need the following photos taken pre and post project completion:
  - Lighting:
    - Overall photos showing bulbs and light disbursement of each room/outside fixture on proposal (so we can see the whole room and the lights in the photos)
    - Photos of individual bulbs installed.
    - Close up photos of each type of bulb showing wattage and model number clearly.
    - Photos of each type of ballast where applicable. If getting a ballast photo would damage the fixture, a phone photo showing lines (for magnetic ballasts) or photos of a discriminator is also acceptable.
    - If you have a bulb in a hard to reach fixture (ex. outdoor metal halide) you can also send those during construction.
  - Refrigeration:
    - For strip curtains, photos of doorways of walk in fridges/freezers showing entire doorway. For post photos, the photo must show the entire doorway and show that the curtains reach the floor.
    - For door heater controls, photos of coolers for any controls. Post photos must show control installed.
- If the project is inspected, the inspector will take photos. However, the contractor is fully responsible for all photos. If there are missing photos, you will be responsible for getting these photos.

Project Approval

- After all photos are received and inspection is complete (if necessary), you program contact will review the photos and determine if any additional photos are needed. If photos of ballast or hard to reach photos weren't taken, you will need to take them and send them during construction.
- Your project is only approved after your program contact sends you an email stating that you are approved for construction.
- If a project begins construction before approval, you risk losing incentives on that project.

Products

- Products installed must be Energy Star approved (LED bulbs and some fixtures), DLC approved (LED fixtures), or CEE approved (T8 bulbs).
- You can check to see if your product qualifies using the links below. Products must be listed on these sites to qualify. Having the logo on the packaging will not qualify a product unless it is listed on the respective site. If you have any questions regarding product qualification, contact your program representative.
  - Energy Star: http://www.energystar.gov/productfinder/product/certified-light-bulbs/results
  - DLC: https://www.designlights.org/qpl
  - CEE: http://library.cee1.org/content/commercial-lighting-qualifying-products-lists

After Installation

- When installation is complete, notify your program representative (not the inspector). You should send all post materials directly to your program representative.
- If a post inspection is required, your program contact will assign the project to the inspector. The inspector will contact you and the customer to set up a time to complete the inspection.
- If a post inspection is not needed, you will need to send all post photos, any missing pre photos, and the materials invoice from the project (from your vendor) showing model number and wattage to your program contact.
- You will need to send your program contact the materials invoice from the project (from your vendor) showing model numbers and quantities of each bulb/fixture used.
- Your program contact will review all materials and let you know if there is any missing information.

Payment

- After program representative has received all of the required materials (pre pics, post pics, & materials invoices) and verified qualification of all installed products, your project will be ready to be paid.
- Payment is sent directly to you and cannot be sent to the customer.
- CLEAResult does not deal with your invoicing process with the customer. You will be responsible for billing and collecting payment from the customer.
- You are responsible for any tax obligations that arise out of program participation.
- You will receive a check in roughly 2 weeks after the project was approved for payment.