Project Developer/Trade Pro

If a project lead and/or NMEC project record was not made by a PG&E Representative, the Project Developer/Trade Pro can create the OBF NMEC project record by inputting the additional fields within their respective stages:

1. Getting Started

1.1. Select the NMEC Projects tab and click Create New NMEC Project

ene	rgy	Insight	S	earch		Search		
Home	Reports	Bulk Upload Apps	Projects	Content	Chatter	Cohort Bulk Upload	NMEC Projects	Site Specific Bulk Upload
2	NMEC Projec Home	ts						
View:	NMEC-All		▼ Go!					
Rece	ent NMEC	Projects		(Create New N	NMEC Project		

1.2. Click the dropdown menu and select either Population Non-Res. or Site-Specific projects accordingly

ene	rgy	insight	S	earch		Search			
Home	Reports	Bulk Upload Apps	Projects	Content	Chatter	Cohort Bulk Upload	NMEC Projects	Site Specific Bulk Upload	
2 Select	Select a record type for the new nmec project.								
Sele	ct NMEC F	Project Record Type	•						
	Recor	d Type of new record	Population	Non-Res O	BF 🔻				
					Continue	Cancel			

Note:

- For Tier 1 LED Lighting projects -select the Population Non-Res. NMEC project record type
- For Tier 2 or Tier 1 Non-Lighting projects -select the Site-Specific NMEC project record type

2. Stage: NMEC Project Information

- 2.1. Once the project record has been created, click *edit* and enter the following fields:
 - 2.1.1. Project Name –make sure to include the OBF application number (the OBF application number will be used to link your NMEC project record with your Financing Application)
 - 2.1.2. Anticipated Close Date
 - 2.1.3. Budget
 - 2.1.4. Site Building Type Description
 - 2.1.5. Tech. Categories (lighting, controls, etc.)
 - 2.1.6. Special Flag -select the On-Bill Financing option

NMEC Project Edit	Save Save & New Cancel		
NMEC Project Information			🕇 🐂 Requ
Project Name	Customer DBA - Site - (OBI Previous Stage	Early PM Review	
Project ID	Population Non-Res OBF-9 Stage	Pre-Install Tech Review	
Project Number	Population Non-Res OBF - 928 Next Stage.	None V i	
Population	Account	8452987	
Anticipated Closed Date	[2/7/2020]		
Budget	5K-25K Started Recording Savings		
Site Building Type Description	Other Agricultural Savings Recorded Date		
Tech Categories	Compressed Air Food Service HVAC Motors All savings and Payments recorded Lighting		
Special Project Flag	Available Hard To Reach TDSM		
Special Project Flag Reasons	Available English as a 2nd Language Geography - Certain Counties Leased or Rented Facilities		
Closed date			
Comments	QA - Arup		

Note: As previously mentioned, PG&E is increasing the pool of funded OBF Quality Assurance (QA) providers. Within the Comments section, you will need to disclose your preferred QA

3. Stage: Description & New

- 3.1. Before you can successfully save your NMEC project record, click *edit* and enter the following fields *-don't forget to click save*: 3.1.1. SA ID
 - 3.1.2. Site Name -to enter the Site Name, click on the *magnifying glass* and then select the active and primary Service Agreement ID (see image below)

		eifste-pgecommunity.cs35.force.com/energyinsi	ght/_ui/commo	n/data/Lookup	Page?lkfm=edit	Q
W SA ID Site Name	CLOVIS CEMETERY DIST	Lookup CLOVISCEMETERY DIST Get Search Name All Fields				
re-inst estmt implementation Start Date 're-inst estmt: Implementation End Date Pre-install estimate: Simple Payback Pre-install estimate: Weighted Avg EUL India's Form Attached?	1/6/2020 [1/6/2020] 1/13/2020 [1/6/2020] 4.91 12	< <u>Clear Search Results</u> Search Results <u>M</u> Site/Service Agreements [6] Show Fitters				_
		Site Name	SAID	Service Status	Street Address Line 1	
Pre-install estimate : Savings(kW)	3	AVE - CLOVIS	970	Active	305 N VILLA AVE	
Pre-install estimate : Savings(kWh)	9279	AVE - CLOVIS	005	Closed	305 N VILLA AVE	
Pre-install estimate: Savings(Therms)	0	AVE - CLOVIS	005	Closed	305 N VILLA AVE	
Pre-install estimate: Cost(\$)	11589.26	AVE - CLOVIS	574	Active	305 N VILLA AVE	
		AVE - CLOVIS	226	Active	305 N VILLA AVE	
		AVE - CLOVIS	131	Closed	305 N VILLA AVE	

- 3.1.3. Pre-Install Estimate: Intervention Start Date + Intervention End Date
- 3.1.4. Pre-Install Estimate: Simple Payback, Weighted Avg. EUL, Savings (kW, kWh, therms), Costs (\$)
- 3.1.5. Intake Form Attached -check the box
- 3.1.6. Payee Type
- 3.1.7. Site Contact: First and Last Name, Phone, Email
- 3.1.8. Program: On-Bill Finance (Population Non-Res)
- 3.1.9. Project Developer

Note: Only fill in the Implementer field if you are submitting the project record as a PG&E Third-Partner profile

New			
SA ID	5548825970, 2507207574,	Site Contact First Name Joe	
😑 Site Name	CLOVIS CEMETERY DIST	Site Contact Last Name Smith	
		Site Contact Phone (415) 987-7487	
Pre-Inst estmt:Implementation Start Date	1/6/2020 [1/6/2020]	Site Contact Email jSmith@acme.com	_
Pre-Inst estmt: Implementation End Date	1/13/2020 [1/6/2020]	Alternate Contact	9
😑 Pre-install estimate: Simple Payback	4.91	Additional address details	
🔴 Pre-install estimate: Weighted Avg EUL	12		
Intake Form Attached?		Program On-Bill Finance (Popu	ation
Pre-install estimate : Savings(kW)	3	M&V External 🥥	
Pre-install estimate : Savings(kWh)	9279	M&V Internal 🥥	
Pre-install estimate: Savings(Therms)	0	Implementer 🥥	
Pre-install estimate: Cost(\$)	11589.26	Project Developer 🥹 Corey Brophy	9
		СІТ 🥝	
		Tech Reviewer 🥝	
		Field Engineer (2)	

4. Sharing Access

4.1. To share access for your new NMEC project record, locate and click the Sharing option

VMEC P	roject has been saved.				
< Back to List	: NMEC Projects				
		NME	C Related SA's [] Notes & Attachments [0] NMEC Project History []		
NMEC Pro	ject Detail	Edit Sharing	ר		
VINEC Pro	ject Information				
	Project Name	CCD - MS lightng - 012345	Previous	Stage	
	Project ID	Population Non-Res OBF-4623		Stage New	
	Project Number	Population Non-Res OBF - 4623	Next	Stage.	
	Population		A	count 8	
	Cohort Number		Account Customer	Name 0	DISTRICT
	Home Reports Bulk Upload	Apps Projects Content Chatter Cohort Bulk Uplos g - 012345 roles, and territories that have sharing access to CCD - MS light MS light	ad NMEC Projects Site Specific Bulk Upload		1
	View: All V				v
	User and Group Sharing	Add xpand List	W B C D E F O B H O K E M N		
	Action Type	Name †	Access Leve	Reason	
	Partner User	ECOGREEN SOLUTIONS: Cameron Barcelona	Full Access	Owner	
	Explanation of Access Levels • Full Access - User can vie • Read/Write - User can view	w, edit, delete, and transfer the record. User can also extend sharing a w and edit the record and add associated records notes and attaching	iccess to other users.		
	 Read Only - User can view Private - User cannot acce 	v the record, and add associated records to it. They cannot edit the rec rss the record in any way.	ord or add notes or attachments.		

- 4.3. Enter the name of the QA firm selected to perform the QA review
- 4.4. Click find
- 4.5. Select Partner User and click to add
- 4.6. Change access level to "Read/Write" -this will allow the QA to enter both the pre and post-install estimates to the NMEC project record

Home	Reports	Bulk Upload Apps	Projects	Content	Chatter	Cohort Bulk Upload	NMEC Projects	Site Specific Bulk Upload
2	New St	htng - 012345 naring						
NMEC F below th Individua	Project: Spe at role. al sharing c	ecity the sharing for this	s record. You int wider acc	u can share ess to data,	not to restr	and its related data with i	individual users, pei	rsonal or public groups, the use
New	Sharing				Sa	Ve Cancel		
Shari	ing Inform	ation						
Nor	IIIIable	Partner User: O	BF QA Arup	*]			
		Access Leve	Read/V	Vrite 🔻				
					Sa	ve ancel		

4.7. Click save



This page lists the users, groups, roles, and territories that have sharing access to CCD - MS lighting - 012345. Click Expand List to view all users who have access to it.

View: All V

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V |

User a	nd Group Sharing	Add Expand List		
Action	Туре	Name +	Access Level	Reason
	Partner User	ECOGREEN SOLUTIONS: Cameron Barcelona	Full Access	Owner
Edit Del	Partner User	Arup: OBF QA Arup	Read/Write	Manual Sharing

Explanation of Access Levels

- Full Access User can view, edit, delete, and transfer the record. User can also extend sharing access to other users.
 Read/Write User can view and edit the record, and add associated records, notes, and attachments to it.
 Read Only User can view the record, and add associated records to it. They cannot edit the record or add notes or attachments.
 Private User cannot access the record in any way.

5. Attaching Files:

- 5.1. To attach files: pre-install project package, signed 3rd party release form, payment history screening request, and/or any additional information you deem fit click Attach File
- 5.2. Select the file and click Choose File
- 5.3. Click the Attach File button -when the upload is complete the file information will appear below
- 5.4. Click *done* to return to the project record

6. Stage: Project Development

- 6.1. Once all necessary documents have been uploaded, click edit to confirm the following fields -don't forget to click save:
 - 6.1.1. Pre-Install Report Packet Uploaded -select Yes
 - 6.1.2. Application Signed -check the box

Project Development		
Pre Install report packet uploaded 🤪 Yes 🔻	Application signed?	•

7. Stage: Feasibility Assessment

- 7.1. To move your project to the next stage, click edit
- 7.2. Locate the Next Stage field and select "Feasibility Assessment"

NMEC Project Edit	Save Save & New Cancel		
NMEC Project Information			are Required Information
Project Name Sample - C	OBF 010123	Previous Stage	
Project ID Population	Non-Res OBF-7	Stage	New
Project Number Population N	Ion-Res OBF - 798	lext Stage.	Feasibility Assessment v
Population	%	Account	8053225

Note: The Feasibility Assessment will be completed by the OBF PM. The OBF PM will be responsible for moving the following project stages: Project Development, Early PM Review, and Pre-Install Tech. Review. A "chatter" message will be sent to the Tech. Reviewer/QA to start the pre-install review

Sal	^{C Project} mple - OBF 01012	3					Printable \
J- Show F	Feed						
« Back to Lis	st: NMEC Projects						
				NMEC Related SA's [0] Notes & Attachments [0]	NMEC Project History [4]		
NMEC Pr	roject Detail		Edit				
▼ NMEC P	roject Information						
	Project Name	Sample - OBF	010123		Previous Stage	Early PM Review	
	Project ID	Population Nor	n-Res OBF-798		Stage	Pre-Install Tech Revie	W
	Project Number	Population Nor	n-Res OBF - 798		Next Stage.		
	Population				Account		
	Cohort Number				Account Customer Name		
					Financing Application Status	CR Passed, Awaiting	Арр
	× Now						
	▼ New	SA ID			Si	te Contact First Name	
		Site Name		- CONCORD	Si	te Contact Last Name	
		Site Address	COAK ODOVE DE	CONCORD OF SIST		Site Contact Phone	
		Site City	CONCORD			Site Contact Email	
		Site State	CA			Alternate Contact	
		Site Zip			Addi	tional address details	
	Pre-Inst estmt:Implementa	ation Start Date	3/6/2020			Program	On-Bill Finance (Population-Non Res.)
	Pre-Inst estmt: Implement	ation End Date	3/20/2020			Affiliated Program	
	Pre-install estimate: S	imple Payback	6.30			Program code	OBFPNPGE19
	Pre-install estimate: Wei	ghted Avg EUL	12				
	Intake F	orm Attached?	∕			Program Manager	Peter Thompson
						M&V External (David Jump
	Pre-install estimate	: Savings(kW)	6.000			M&V Internal 🤅	
	Pre-install estimate :	Savings(kWh)	256,358.000			Implementer (
	Pre-install estimate: Sa	ivings(Therms)	0.000		Impler	menter Account Name	
	Pre-install es	timate: Cost(\$)	\$352,486.00			Project Developer	Nikolaos Karagiorgos
						CIT	
						Tech Reviewer	Nazik Aytjanova
						Field Engineer	,
Pre-Instal	II Tech Review						
Estin	nated Review Completion Date	2/21/2020			Pre-Install Tech Review Status 🕜		
Pre	e-installation Report Uploaded 📀				Pre-Install Tech Review Date		
					Tech Reviewer Company Name	Arup	
Tech Rev	riewer Pre-Install Estimate (kw)						

Tech Reviewer Pre-Install Estimate (kwh) Tech Reviewer Pre-Inst Estimate (Therms)

Note: The name of the QA Reviewer can be found on either the Tech. Reviewer or Field Engineer fields

8. Stage: Pre-Install Tech. Review

- 8.1. Once the QA begins the pre-install review, the Tech. Reviewer/QA will click *edit* and enter the following fields *-don't forget to click save*:
 - 8.1.1. Estimate Review Complete Date -this is when the Project Developer/Trade Pro should expect to see initial comments provided by the Tech. Reviewer/QA
 - 8.1.2. Tech Reviewer Status -select either Pass, Fail, or Hold
 - 8.1.3. Tech. Reviewer Pre-Install Estimates: (kW, kWh, therms)

 Pre-Install Tech Review 			
Estimated Review Completion Date	1/30/2020	Pre-Install Tech Review Status (Pass
Pre-installation Report Uploaded	1	Pre-Install Tech Review Date	1/30/2020
		Tech Reviewer Company Name	Arup
Tech Reviewer Pre-Install Estimate (kw)	0.000		
Tech Reviewer Pre-Install Estimate (kwh)	20,355.000		
Tech Reviewer Pre-Inst Estimate (Therms)	1,000.000		

8.2. The Tech. Reviewer/QA will send a "chatter" message to the OBF PM and PD recommending project for approval (please follow template)

Home Accounts Reports	Bulk Upload Apps Projects Contacts Content Chatter Kickers Cohort Bulk Upload NMEC Projects Site Specific Bulk Upload
Nikolaos Karagiorgos	Post File Trending Topics All Share an update, @mention someone Share Add topics to your posts to increase their visibility. Topics that have a spike in activity are likely to trend.
What I Follow To Me Bookmarked	Q Show All Updates ~
Muted People Groups Files Topics	OBF 2020 Test 1 — Nazik Aytjanova (Partner) Hi @Cesar Barragan (PG&E) I've completed the review for Financing Application #010234 Sample Project and recommend and approved the recommend savings. Please complete the Pre-Install PM review.
	Best, Nazik cc @Nikolaos Karagiorgos (Partner) @Nadia Hassen (Pacific Gas & Electric Company) @OBF QA Arup (Arup) Comment · Like · Today at 11:39 AM

9. Stage: Pre-Install PM Review

9.1. After the Tech. Reviewer/QA recommends project for approval, the OBF PM will review the project for installation. The OBF PM will click *edit* to confirm the following fields *-don't forget to click save*:

9.1.1. Pre-Install Review Complete -check the box

- 9.1.2. Project Approval for Installation -select either Yes or No
- 9.2. OBF PM will also update the Financing Application status:
 - 9.2.1. Pre-Install Review \rightarrow Loan Agreement Sent \rightarrow Customer Installation
- 9.3. Permission to install project is granted

Pre-Install PM Review Pre-Install Review Complete	1	Project Approved for Installation	Yes
		Pre-Install Review Complete date	1/30/2020

10. Stage: Implementation

- 10.1. Once project installation has been completed, click *edit* to confirm the following fields *-don't forget to click save*:
 - 10.1.1. Implementation Summary -update the project description
 - 10.1.2. Actual Implementation Start Date
 - 10.1.3. Invoice Received
 - 10.1.4. Post-Install Estimate: Savings (kw, kWh, therms)
 - 10.1.5. Post-Install Estimate: EUL
 - 10.1.6. Post-Install Estimate: Project Cost (\$)
 - 10.1.7. Post-Install Estimate: Simple Payback

Implementation			
Actual Implementation start date	3/7/2020 [2/7/2020]	Post-Install Estimate EUL	12.00
Actual Implementation Complete Date	3/21/2020 [2/7/2020]	Post-Install Estimate Project cost(\$)	35,000.00
Invoices Received		ost-Install Estimate : Simple payback	5.00
		Post-Install Estimate : TRC	0.50
Post-Install Estimate : Savings kw	0.000		
Post-Install Estimate : Savings kwh	20,335.000		
😑 Post-Install Estimate : Savings Therms	0.000		
Implementation Notes Implementation Summary	BIUS Project fully installed. No cha review.	ee III 문 프 프 대 내 내 내 나 아이지 않는 것 같아. 아이지 않는 것 않는 것 않는 것 같아. 아이지 않는 것 않는	nce of installation and QA checklist has been uploaded for your

10.2. Send a "chatter" message to the Tech. Reviewer/QA

ome Accounts Reports Buik Opload Apps Projects Contacts	content CI	hatter Kickers	Cohort Bulk Upload	NMEC Projects	Site Specific Bulk Upload	
Project OBF 2020 Test 1						Printable Vie
Hide Feed						
💿 Post 📲 File		0.5.1				
Write something	Share	Follow				
·····		Tonowers				
Q Show All Updates 👻		No followers.				
Nikolaos Karagiorgos (Partner)	w					
Hi @Nazik Aytjanova (Partner)						
The installation for Financing Application #010234 Sample Project has been completed. I've updated the following fields:						
Actual Implementation start date Actual Implementation End date Final costs Final (KV/KVh,therm) savings EUL's The final invoices, OA lighting workbook, photo evidence of installation and reports have been uploaded to the record. Please contact me if you have an questions.	usage Y					
Best,						
Project Developer						
cc @OBF QA Arup (Arup) @Cesar Barragan (PG&E) @Nadia Hassen (Paci Gas & Electric Company)	fic					
Comment · Like · Today at 2:00 PM						
Nazik Aytjanova (Partner) Hi @Nikolaos Karagiorgos (Partner)						
The request has been received. We expect our first comments to y Post-Installation submission to be completed by 03/01/2020.	our					
cc @Cesar Barragan (PG&E)@Nadia Hassen (Pacific Gas & Elect Company)	ric					
Like · Today at 2:09 PM						

11. Stage: Post-Install Tech. Review

11.1. The Tech. Reviewer/QA will click *edit* and enter the following fields *-don't forget to click save*:

- 11.1.1. Post-Inspection Date this is when the Project Developer/Trade Pro should expect to see initial comments provided by the Tech. Reviewer/QA
- 11.1.2. Post-Install Tech. Review Status -select either Pass, Fail, or Hold
- 11.1.3. Post-Install Tech. Review Date
- 11.1.4. Tech. Reviewer Pre-Install Estimates: (kW, kWh, therms)
- 11.1.5. Post-Install Inspection Summary

4/8/2020	Tech Review Post-Install kW Estimate	0.000
Pass	😑 Tech Review Post-Install kWh Estimate	20,355.000
2/7/2020	Tech Review Post-Install Therms Estimate	0.000
04/08/20/20 - Questions addressed by PD. QA Post-Install rev 04/01/2020 - Questions on the following:	view is Approved. Sent to Post-Install PM Review	
Installation photos Incomplete O&M/MPV plan Missing Final invoice		
	4/8/2020 Pass 2/7/2020 04/08/20/20 - Questions addressed by PD. QA Post-Install re 04/01/2020 - Questions on the following: Installation photos Incomplete O&MMMPV plan Missione Final invoice	4/8/2020 Tech Review Post-Install kW Estimate Pass Tech Review Post-Install kW Estimate 2/7/2020 Tech Review Post-Install Therms Estimate 04/08/20/20 - Questions addressed by PD. QA Post-Install review is Approved. Sent to Post-Install PM Review 04/01/2020 - Questions on the following: Installation photos Incomplete Q&MMMPV plan Mission Einal invoice

12. Stage: Post-Install PM Review

12.1. Once the post-install is approved, the OBF PM will click edit to confirm the following fields -don't forget to click save:

- 12.1.1. Post-Install Report Complete -check the box
- 12.1.2. Post-Install Review Complete -check the box
- 12.2. OBF PM will revise the Loan Agreement, if needed

 Post Install PM Review 		
Post-Installation Report Complete	✓ 👩	
Post-Install Review Complete	✓	
Post-Install Review Complete Date	2/7/2020 🕢	

For additional information or questions, contact the OBF Team at: <u>OBFProgram@pge.com</u>