

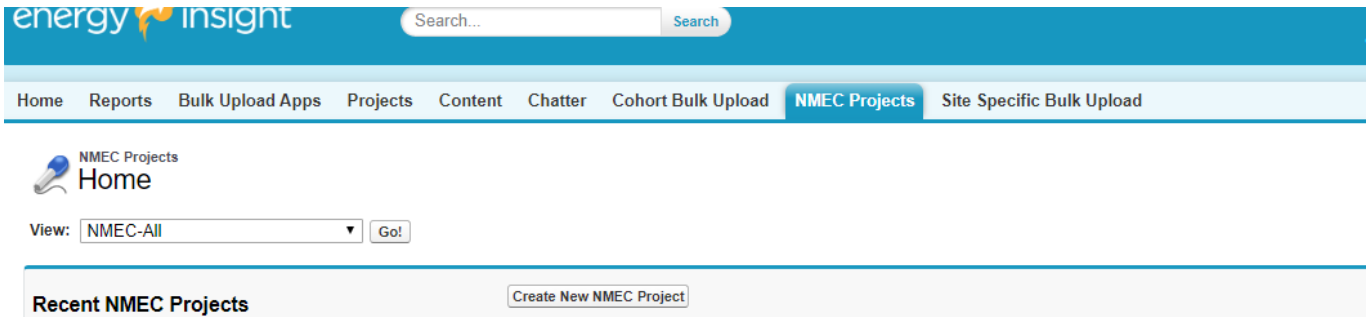
Project Developer/Trade Pro

Energy Insight NMEC Process Guide: Project Developer/Trade Pro
Project Developer/Trade Pro:

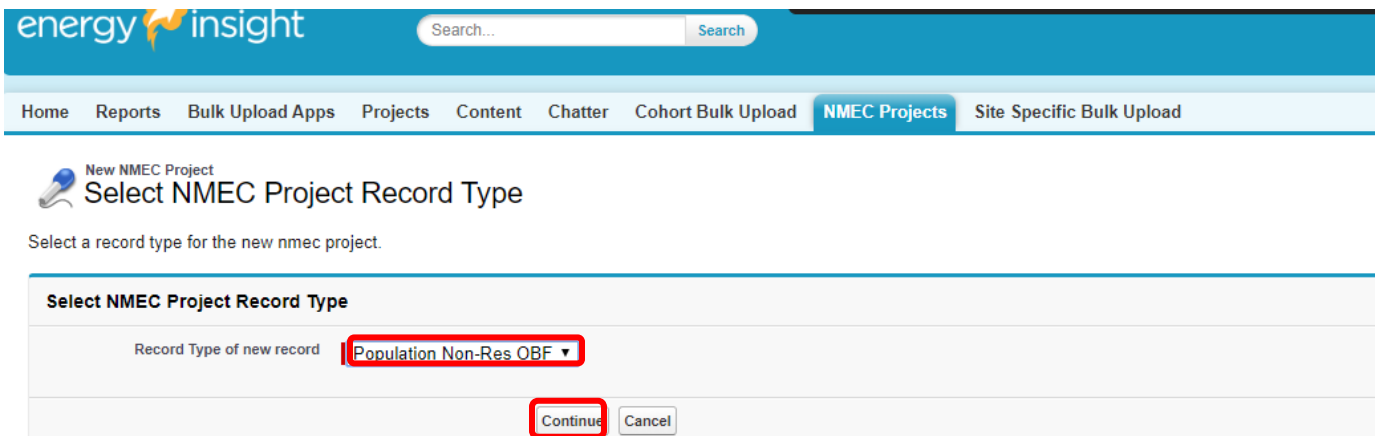
If a project lead and/or NMEC project record was not made by a PG&E Representative, the Project Developer/Trade Pro can create the OBF NMEC project record by inputting the additional fields within their respective stages:

1. Getting Started

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



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



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

Project Name: Customer DBA - Site - (OB)
 Project ID: Population Non-Res OBF-9
 Project Number: Population Non-Res OBF - 928

Population:

Anticipated Closed Date: [2/7/2020]

Budget: 5K-25K

Site Building Type Description: Other Agricultural

Tech Categories: Compressed Air, Food Service, HVAC, Motors
 Chosen: Controls, Lighting

Special Project Flag: Available (Hard To Reach, TDSM), Chosen (On Bill Financing)

Special Project Flag Reasons: Available (English as a 2nd Language, Geography - Certain Counties, Leased or Rented Facilities), Chosen

Closed date:
 Comments: QA - Arup

Previous Stage: Early PM Review
 Stage: Pre-Install Tech Review
 Next Stage: --None--
 Account: 8452987
 Lead Source:

Started Recording Savings:
 Savings Recorded Date:
 All savings and Payments recorded:

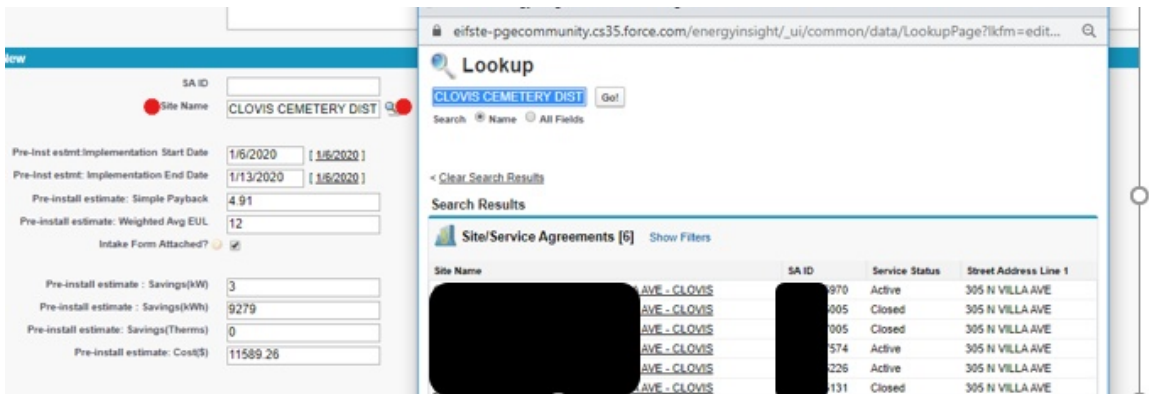
Latest Payment Start Date:
 Latest Payment End Date:

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)



- 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 Name: CLOVIS CEMETERY DIST

Site Contact First Name: Joe

Site Contact Last Name: Smith

Site Contact Phone: (415) 987-7487

Site Contact Email: jSmith@acme.com

Alternate Contact: [Search]

Additional address details: [Text Box]

Program: On-Bill Finance (Population)

M&V External [Dropdown]

M&V Internal [Dropdown]

Implementer [Dropdown]

Project Developer: Corey Brophy

CIT [Dropdown]

Tech Reviewer [Dropdown]

Field Engineer [Dropdown]

Pre-Inst estmt: Implementation Start Date: 1/6/2020 [1/6/2020]

Pre-Inst estmt: Implementation End Date: 1/13/2020 [1/6/2020]

Pre-install estimate: Simple Payback: 4.91

Pre-install estimate: Weighted Avg EUL: 12

Intake Form Attached?

Pre-install estimate: Savings(kW): 3

Pre-install estimate: Savings(kWh): 9279

Pre-install estimate: Savings(Therms): 0

Pre-install estimate: Cost(\$): 11589.26

4. Sharing Access

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

✓ NMEC Project has been saved

◀ Back to List: NMEC Projects

NMEC Related SA's (1) | Notes & Attachments (0) | NMEC Project History (1)

NMEC Project Detail [Edit] **Sharing**

▼ NMEC Project Information

| | | | |
|----------------|-------------------------------|-----------------------|---------------------|
| Project Name | CCD - MS lighting - 012345 | Previous Stage | |
| Project ID | Population Non-Res OBF-4623 | Stage | New |
| Project Number | Population Non-Res OBF - 4623 | Next Stage | |
| Population | | Account | [Redacted] |
| Cohort Number | | Account Customer Name | [Redacted] DISTRICT |

4.2. Click add

Home Reports Bulk Upload Apps Projects Content Chatter Cohort Bulk Upload **NMEC Projects** Site Specific Bulk Upload

Sharing Detail
CCD - MS lighting - 012345
 CCD - MS lighting - 012345

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

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

User and Group Sharing [Add] [Expand List]

| Action | Type | Name | Access Level | Reason |
|--------|--------------|---------------------------------------|--------------|--------|
| | Partner User | ECOGREEN SOLUTIONS, Cameron Barcelona | Full Access | Owner |

Explanation of Access Levels

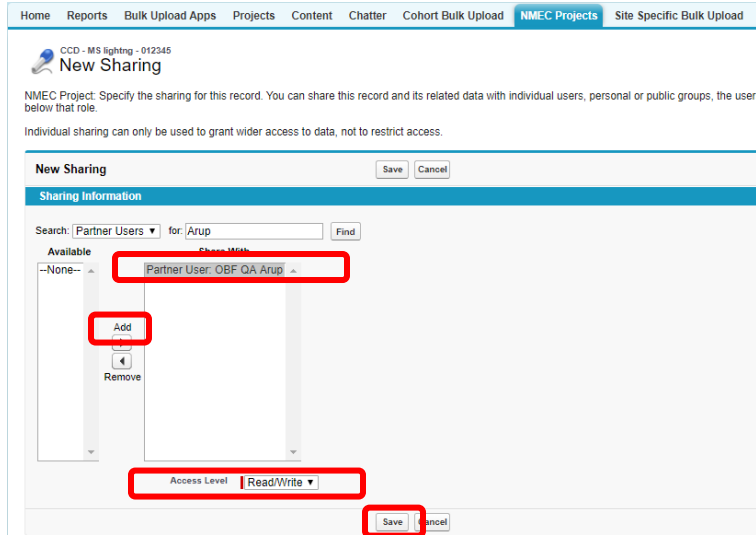
- Full Access - User can view, edit, delete, and transfer the record. User can also extend sharing access to other users.
- Read/Write - User can view and edit the record, and add associated records, notes, and attachments to it.
- Read Only - User can view the record, and add associated records to it.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

4.3. Enter the name of the QA firm selected to perform the QA review

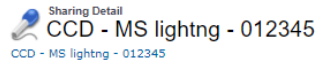
4.4. Click *find*

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



4.7. Click save



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

View: All

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

| Action | Type | 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

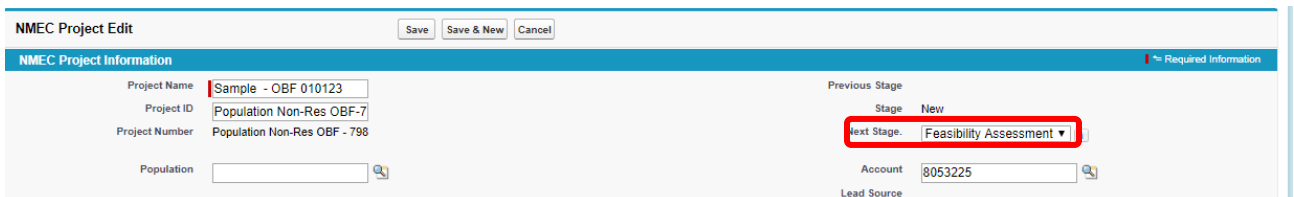
6. Stage: Project Development

- 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



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"



7.3. Click save

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

NMEC Project
Sample - OBF 010123
Printable View

← Back to List: NMEC Projects
NMEC Related SA's (0) | Notes & Attachments (0) | NMEC Project History (4)

NMEC Project Detail Edit

▼ NMEC Project Information

| | | | |
|----------------|------------------------------|------------------------------|-------------------------|
| Project Name | Sample - OBF 010123 | Previous Stage | Early PM Review |
| Project ID | Population Non-Res OBF-798 | Stage | Pre-Install Tech Review |
| Project Number | Population Non-Res OBF - 798 | Next Stage. | |
| Population | | Account | [REDACTED] |
| Cohort Number | | Account Customer Name | [REDACTED] |
| | | Financing Application Status | CR Passed, Awaiting App |

▼ New

| | | | |
|---|-------------------------------------|----------------------------|---------------------------------------|
| SA ID | [REDACTED] | Site Contact First Name | |
| Site Name | [REDACTED] - CONCORD | Site Contact Last Name | |
| Site Address | [REDACTED] | Site Contact Phone | |
| Site City | CONCORD | Site Contact Email | |
| Site State | CA | Alternate Contact | |
| Site Zip | [REDACTED] | Additional address details | |
| Pre-Inst estmt: Implementation Start Date | 3/6/2020 | Program | On-Bill Finance (Population-Non Res.) |
| Pre-Inst estmt: Implementation End Date | 3/20/2020 | Affiliated Program | |
| Pre-install estimate: Simple Payback | 6.30 | Program code | OBFPPNGE19 |
| Pre-install estimate: Weighted Avg EUL | 12 | Program Manager | Peter Thompson |
| Intake Form Attached? | <input checked="" type="checkbox"/> | 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: Savings(Therms) | 0.000 | Implementer Account Name | |
| Pre-install estimate: Cost(\$) | \$352,486.00 | Project Developer | Nikolaos Karagiorgos |
| | | CIT | |
| | | Tech Reviewer | Nazik Aytjanova |
| | | Field Engineer | |

▼ Pre-Install Tech Review

| | | | |
|--|--------------------------|--------------------------------|------|
| Estimated Review Completion Date | 2/21/2020 | Pre-Install Tech Review Status | |
| Pre-installation Report Uploaded | <input type="checkbox"/> | Pre-Install Tech Review Date | |
| Tech Reviewer Pre-Install Estimate (kw) | | Tech Reviewer Company Name | Arup |
| 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

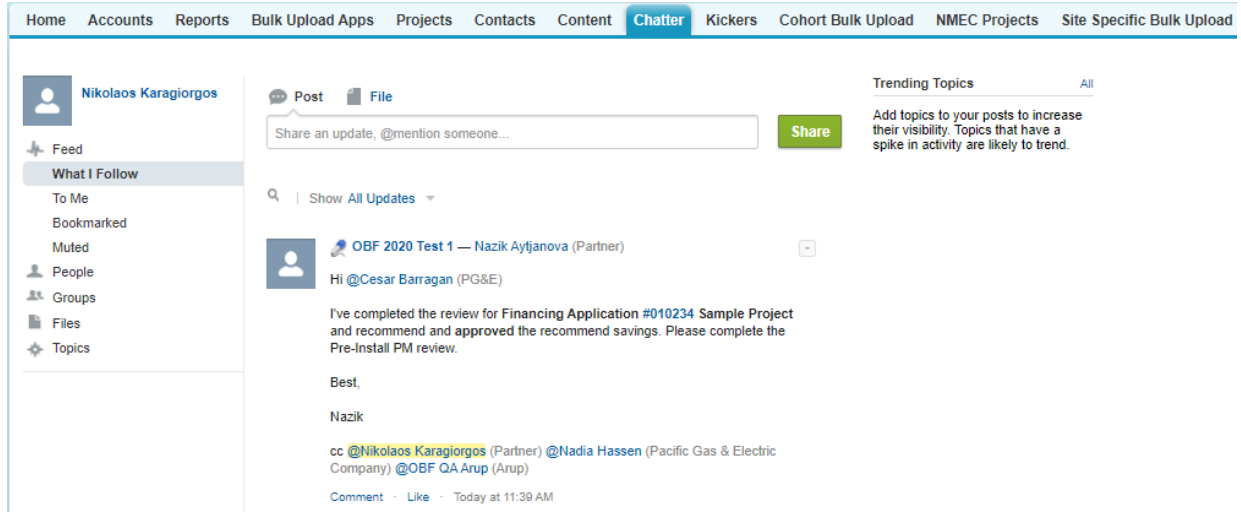
8.1. Once the QA begins the pre-install review, the Tech. Reviewer/QA will click *edit* and enter the following fields -*don't forget to click save*:

- 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

| | |
|--|---|
| <ul style="list-style-type: none"> ● Estimated Review Completion Date 1/30/2020 Pre-installation Report Uploaded <input checked="" type="checkbox"/> | <ul style="list-style-type: none"> ● Pre-Install Tech Review Status ● Pass Pre-Install Tech Review Date 1/30/2020 Tech Reviewer Company Name Arup |
| <ul style="list-style-type: none"> ● 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)



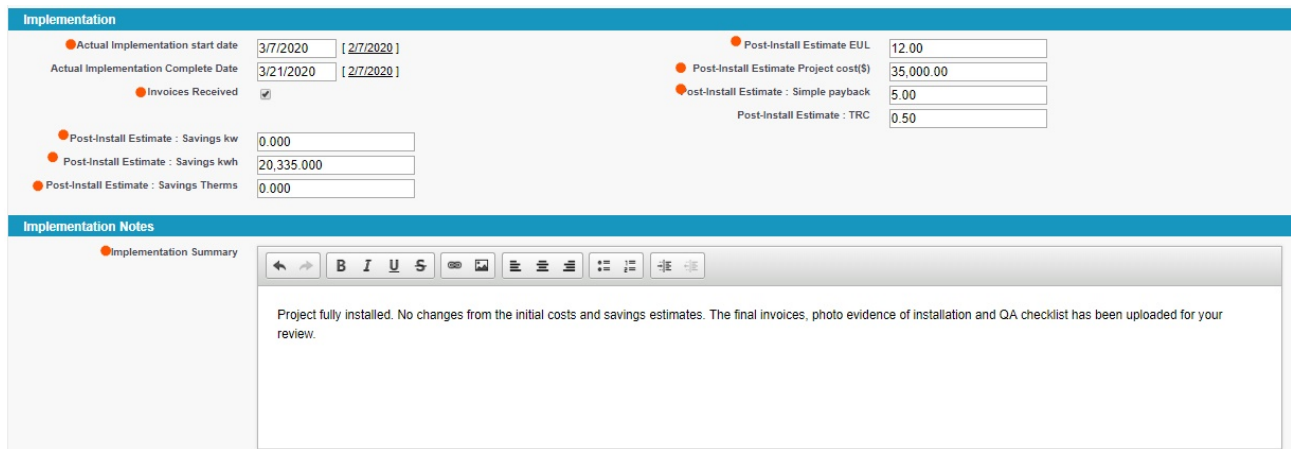
9. Stage: Pre-Install PM Review

- 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 → Loan Agreement Sent → Customer Installation
- 9.3. Permission to install project is granted

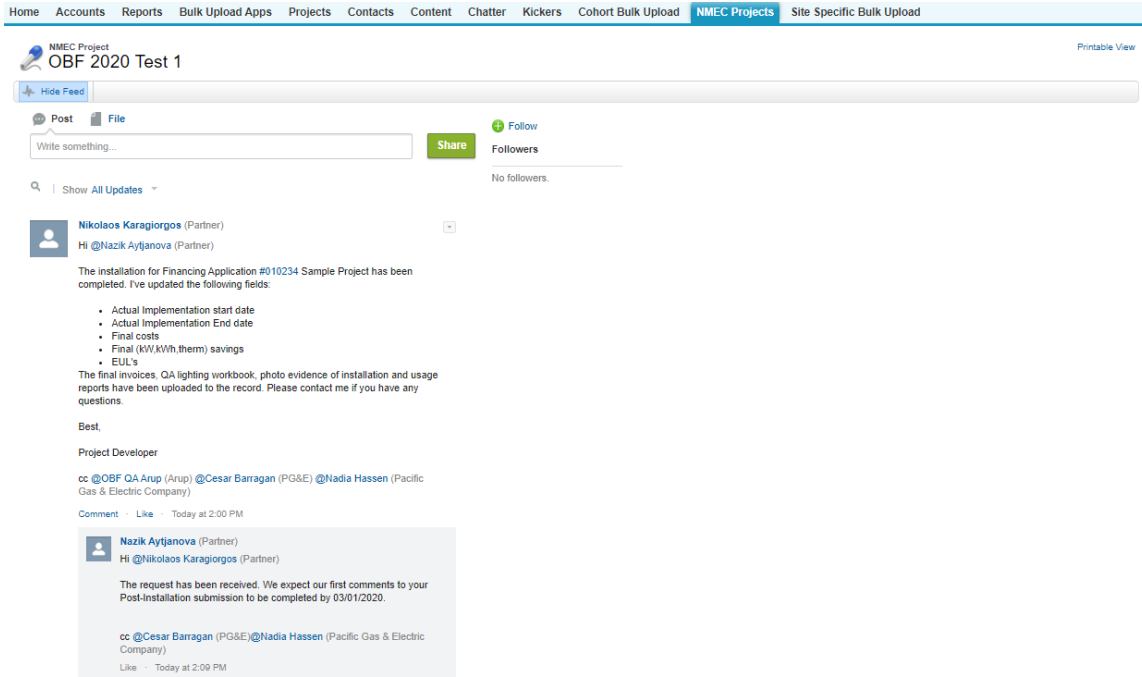


10. Stage: Implementation

- 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



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



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

| ▼ Post-Install Tech Review | | | |
|--|---|--|------------|
| ● Post-Inspection Date | 4/8/2020 | ● Tech Review Post-Install kW Estimate | 0.000 |
| ● Post-Install Tech Review Status | Pass | ● Tech Review Post-Install kWh Estimate | 20.355.000 |
| ● Post-Install Tech Review Date | 2/7/2020 | ● Tech Review Post-Install Therms Estimate | 0.000 |
| ▼ Post-Install Tech Review Notes | | | |
| ● Post-Installation Inspection Summary | 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: <ul style="list-style-type: none"> • Installation photos • Incomplete OSM/MPV plan • Missing Final 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 | <input checked="" type="checkbox"/> | |
| ● Post-Install Review Complete | <input checked="" type="checkbox"/> | |
| Post-Install Review Complete Date | 2/7/2020 | |

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