

# ENTERGY SOLUTIONS

AN ENTERGY TEXAS PROGRAM

## 2017 Residential & Hard-to-Reach Standard Offer Program Workshop

November 8, 2016

Dial In: 877-783-2009

Passcode: 981535

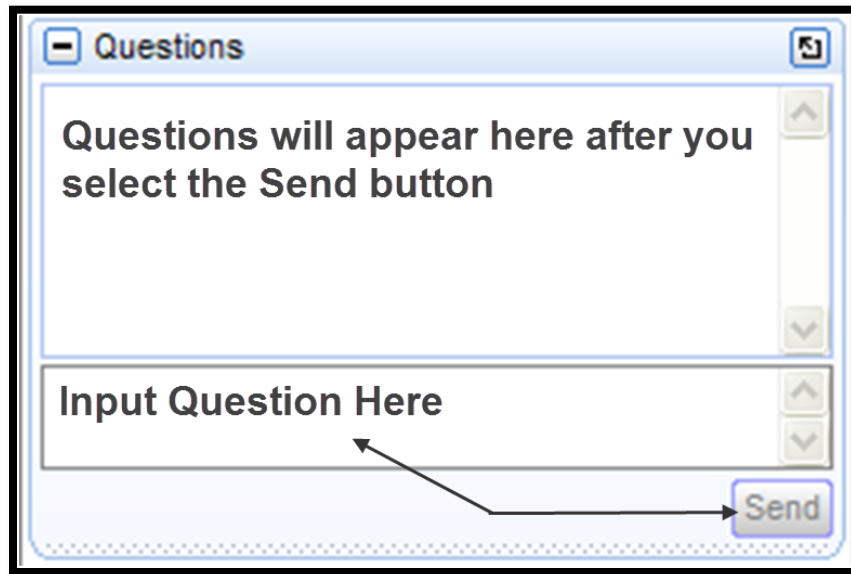


- You can minimize the Webinar toolbar by selecting the red arrow button



- You can select the same button to make the toolbar appear again

- Attendees will be on mute during the call
- You can ask a question by utilizing the Question Box located on the Webinar toolbar



- 2016 Program Results
- 2016 Program Challenges
- 2017 Program Details
- 2017 Program Changes
- Entergy Solutions Branding
- P3 – Program Portfolio Portal
- 10 Minute Break-
- Questions and Answers

## Entergy Team

Mike Snyder  
(409) 981-2113  
[msnyder@entergy.com](mailto:msnyder@entergy.com)

Kelley Carson  
(281) 297-2213  
[jcarso1@entergy.com](mailto:jcarso1@entergy.com)

## Frontier – IT Support

Tracie Cooper  
(512)372-8778 x 136  
[tcooper@frontierassoc.com](mailto:tcooper@frontierassoc.com)

Blake Thomas  
(512)372-8778 x 131  
[bthomas@frontierassoc.com](mailto:bthomas@frontierassoc.com)

# 2016 Program Results

# 2016 YTD Program Summary

	Residential SOP	HTR SOP	Total
<b>Budget</b>	\$1,699,233	\$1,260,789	<b>\$2,960,022</b>
<b># Customers</b>	1,978	892	<b>2,870</b>
<b># Installs</b>	6,481	2,831	<b>9,312</b>
<b>kW Savings</b>	3,063	1,363	<b>4,426</b>
<b>kWh Savings</b>	11,108,393	4,777,952	<b>15,886,345</b>

*\*Values updated on 10/26/2016 based on submitted projects*

# 2016 Program Challenges



- Launched new P3 tracking system
- Saturated market
- Customers not receiving follow-up call to confirm appointment
- Customers not receiving copies of signed documents
- Customers refusing post inspections
- Incorrect account and meter numbers entered into database
  - Meter numbers used to identify sites
  - Customers may be rejected

# 2017 Program Details

# 2017 Program Budgets

Program	Budget
Residential Standard Offer Program	\$1,699,233
Hard-to-Reach Standard Offer Program	\$1,026,789
Total	\$2,726,022

# 2017 Residential SOP Incentives

Measure	\$/kW	\$/kWh
Infiltration	245	0.08
Duct Sealing	250	0.08
Ceiling Insulation	300	0.10
LED Light Bulbs	305	0.12
Water Heater Measures	100	0.05
Window A/C	477	0.14
Ceiling Insulation + LED Light Bulbs	345	0.12

# 2017 Hard-to-Reach SOP Incentives

Measure	\$/kW	\$/kWh
Infiltration	395	0.12
Duct Sealing	400	0.12
Ceiling Insulation	400	0.12
LED Light Bulbs	455	0.15
Water Heater Measures	120	0.07
Window A/C	500	0.16
Ceiling Insulation + LED Light Bulbs	460	0.14

- Incentives are paid directly to Market Actor.
- Market Actor is not required to pass any incentives to customers.
- PUCT requires the Market Actor to disclose that incentives are available “through a ratepayer funded program, manufacturers, or other entities.”

- Only Large contracts
- 7 Market Actors selected
- Each Market Actor will receive two contracts:  
Residential SOP and HTR SOP
  - Market Actors **MUST** submit applications for both programs
  - Required documents must be uploaded with applications

- Insurance
  - Mandatory coverage: \$1 million General Liability, Automobile Liability, and Workers Compensation
  - List Entergy Texas as an additional insurance holder
- All appropriate licenses and permits for DU and IN
  - HERS, HERO, HPP or BPI certificate for Blower Door testing and Duct Blaster™
  - Certified employee **MUST** be on job site to supervise testing
- Minimum of three references (utility preferred)
- Technical capabilities and experience
- Detailed marketing plan



- Res and HTR Applications Open:  
Monday, November 14, 2016 @ 8 am
- Residential Application Submission:  
Monday, November 21, 2016 @ 8 am
  - HTR can be submitted anytime after
  - Application review priority will be based on the Residential application submission time

- Review priority based on Residential application submission time
  - Determines the order that Entergy Texas reviews applications, **NOT** awards contracts
- Award Metrics:
  - Previous program experience
  - Milestone performance
  - Offering a comprehensive set of measures
  - Inspection results and feedback
  - Customer satisfaction
  - References

# Market Actor Award Metrics

Metric	Percentage
Prior Experience	25%
Milestone Performance	20%
Comprehensive Measures	20%
Inspection Results	15%
Customer Complaints/Satisfaction	10%
References	10%

- 50% of each Contract submitted by 6/1/2017
- 80% of each Contract submitted by 9/30/2017
- 100% of each Contract submitted by 11/30/2017
- Milestone dates apply to both Res and HTR contracts

- Identify potential customers
- Verify customer eligibility
  - Must receive Distribution service from Entergy Texas
  - Has not been retrofitted in past 10 years
  - Only houses, mobile homes, or apartments built BEFORE January 2010 qualify
- Have customers sign Host Customer Agreement and Customer Acknowledgement forms

- Verbally inform customers about the inspection process and that they could be selected for a random site inspection
- Explain the installation tests that you perform (i.e. Duct Blaster and Blower Door)
- For duct efficiency, infiltration, and ceiling insulation: Must enter project into work schedule **before** installation
- Upload all required documents with project to tracking system

- HTR customers have a total household income of less than 200% of current federal poverty guidelines.
- HTR customers must complete Income Eligibility Self Certification Form.
- HTR apartment complexes and other multi-family dwellings must complete the Multi-family Income Eligibility form.

- Retrofit Only – NO NEW CONSTRUCTION
- Residential Customers – NO COMMERCIAL
- Single Family
- Mobile Homes
- Multi-family
  - ✓ All individually-metered multi-family properties
  - ✗ Common areas are commercial and not eligible.
  - ✗ Master-metered apartments are commercial and not eligible.



- Pre & Post Blower Door Testing is required for IN measure and Pre & Post Duct Blaster™ Testing is required for DU:
  - Duct Blaster™ CFM is measured at 25 Pa
  - Blower Door CFM is measured at 50 Pa
  - If the results of the pre-installation carbon monoxide (CO) or blower door testing indicates that the installation of IN or DU measures could possibly result in post-installation CO or CFM levels not meeting program standards, then the Market Actor should exclude these measures from the list of those to be evaluated for installation.
  - Leakage to Outside testing is required for the Duct Efficiency measure.
  - Whole house must be treated and tested.

- Input addresses with the correct street number and name, city, state, and county.
- Do not abbreviate city names.  
 Port Arthur       Pt Arthur
- Do not use a hyphen in between a street number and name.  
 511 43th Street       511-43th Street
- Input correct account and meter numbers. Information can be found on customer's bill.

- Invoice created for projects submitted in a given month
- Required customer documents include:
  - Customer Acknowledgement Form
  - Customer Installation Agreement
  - Income Eligibility Certification Form (HTR)
  - Duct Sealing and Air Infiltration Form
  - Field Installation Report
  - Meter Picture
  - Pictures of installed measures, manometer readings, etc.
  - Property Manager Certificate for multi-family complexes
  - Multi-family Income Certification Form for HTR complexes
- Payment may be adjusted based on findings from desktop audits and field inspections
- Payment terms are **net 45 days**

- Primary Address:

ATTN: Mike Snyder

Entergy Texas, Inc.

Res/HTR SOP Administrator

350 Pine Street

Beaumont, TX 77701

- Insurance Certificates and Signed Agreements **MUST** be sent to the above address.

- PUCT continuing to use a third party evaluator
- Evaluator may contact you or your customers
- Continue to keep all customer forms, agreements, field notes, and other documents for your records

# 2017 Program Changes

# 2017 Program Changes

- 7 Market Actors
- Lower HTR budget
- Higher incentives for LED lights
- Combo rate for ceiling insulation and LED lights
- TRM 4.0 Changes
  - Lower kW and kWh savings for duct efficiency
  - Higher kW savings for infiltration and ceiling insulation
- Pre and post picture required for all installed measures
- Focus on comprehensive measures – two measures must be installed per project
- Emphasis on Quality Assurance and Customer Satisfaction

- Lower kW and kWh savings
  - ~ 20% reduction in kW from TRM 3.1
  - ~ 40% reduction in kWh from TRM 3.1
- Increased documentation
  - Pictures of pre and post tests readings
  - Sample pictures of pre and post retrofit conditions (sealed return, registers, plenum, etc.)
  - Time and date stamp required
- Home must have central air conditioning or heating to qualify
- Measure must be installed according to TRM 4.0 requirements



- Higher kW and lower kWh savings
  - ~ 35% increase in kW from TRM 3.1
  - ~ 5% reduction in kWh from TRM 3.1
- Increased documentation
  - Pictures of pre and post tests readings
  - Sample pictures of pre and post retrofit conditions (sealed plumbing bypasses, door weather stripping, caulking around window frames, etc.)
  - Time and date stamp required
- Home must have central air conditioning or heating to qualify
- Measure must be installed according to TRM 4.0 requirements

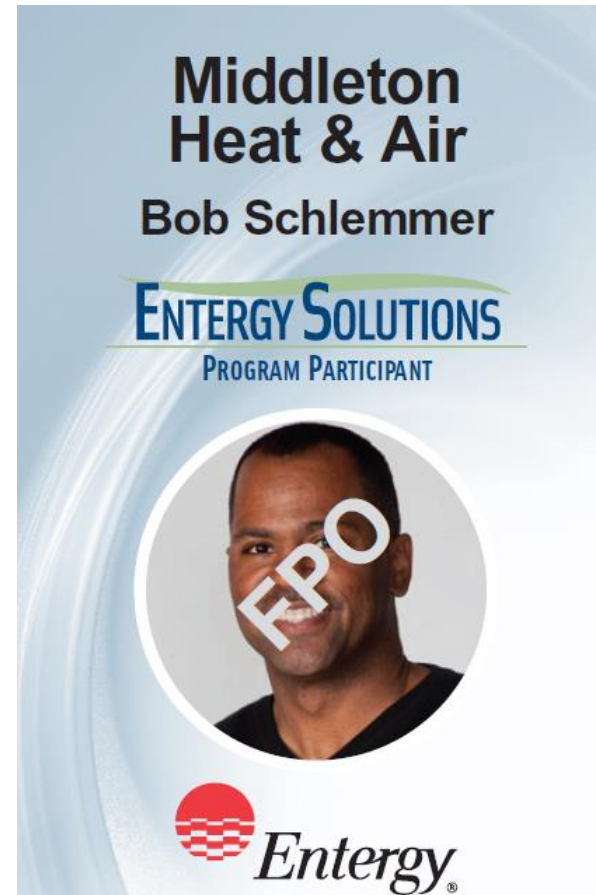
- Higher kW and lower kWh savings
  - ~ 50% increase in kW from TRM 3.1
  - ~ 1% reduction in kWh from TRM 3.1
- Increased documentation
  - Pre and post pictures showing the entire attic floor
  - Close-up pictures of a ruler that shows the depth of the insulation
  - Time and date stamp required
- Home must have central air conditioning or heating to qualify
- Measure must be installed according to TRM 4.0 requirements

# Energy Solutions Branding

- Brand name for all Entergy Energy Efficiency Programs
- Market actors must use branding to strengthen credibility
- All marketing materials must be reviewed by Entergy
- Pay attention to the Terms of Use
- Images and Terms of Use are available on the website



- All Market Actors must require workers to wear a photo ID
- Photo ID establishes credibility with customer



# P3 – Program Portfolio Portal

## Log in

Remember me

Log in

[Forgot password?](#)

[Need help getting started?](#)

Sign up now  
[Create account](#)



© 2016 Frontier Associates

## Sign up

**Sign up**

By signing up, you agree to the [Terms of Use](#).

[Need help getting started?](#)

Have an account?

[Log in](#)



## Verification Email Sent

An email has been sent to the email address that you provided.  
Please click on the link within that email to verify your email address and gain access to the site.

From:  no-reply@enertrek.com  
To:  mikevans@gmail.com  
Cc:  
Subject: Verification E-Mail

Thank you for registering with P3 Enertrek

### Final Step: Please validate your e-mail address now

For your security, we need to verify that you own this e-mail address, please click the following link:

[http://vmwebserver01.fa.local/Orchard\\_Testers/Users/Account/ChallengeEmail?nonce=AshCngZScO77PuVOYBMvP%2BGUNPXMS67ULrC3XHRIXtmwHRwHvXgmWUF3swDKtZnuWj6XEJjJqMg440Vpmu%2BTZPD%2FhH8e%2FKF5nsBSbzfAZhfkNztlmpQR2VkxNIE9QNbrhJ0wozmsqfu5vCTSbeHA%3D%3D](http://vmwebserver01.fa.local/Orchard_Testers/Users/Account/ChallengeEmail?nonce=AshCngZScO77PuVOYBMvP%2BGUNPXMS67ULrC3XHRIXtmwHRwHvXgmWUF3swDKtZnuWj6XEJjJqMg440Vpmu%2BTZPD%2FhH8e%2FKF5nsBSbzfAZhfkNztlmpQR2VkxNIE9QNbrhJ0wozmsqfu5vCTSbeHA%3D%3D)

You will be asked complete your registration.

### Troubleshooting:

If clicking on the link above does not work, try the following:

Select and copy the entire link.  
Open a browser window and paste the link in the address bar.  
Click **Go** or, on your keyboard, press **Enter** or **Return**.

## Complete User Profile

Select your user type



Customer

You are a residential or commercial customer that receives utility services from Enertrek.

or



Market Actor

You are a service provider that assists Enertrek in delivering conservation programs to customers (e.g Trade Ally, Builder, Rater, Energy Services Company, etc.).

Next

## Complete Market Actor Profile

- Verify Tax ID** >
- Profile Form >
- Submit Profile >

### Verify Tax ID

Provide your company's tax identification number to determine if this company already has a profile created.

Tax ID should be input as **nine digits without hyphens.**

Back Next

## Complete Market Actor Profile

Verify Tax ID >

**Profile Form >**

Submit Profile >

- Minority Owned
- Disabled Veteran Owned

Company Contact First Name \*

Mike

Company Contact Last Name \*

Evans

Phone 1 \*

(555)555-5555

Phone 2 \*

(555)444-4444

Email \*

mikevans@gmail.com

Physical Address 1 \*

|


Back

Next

## Complete Market Actor Profile

- Verify Tax ID >
- Profile Form >
- Submit Profile >**

### Submit Profile



**Sanders Construction**

Your profile is now ready to submit.

[Back](#) [Submit](#)

Progress bar: 25% complete



HOME



DASHBOARD



PROGRAMS



PROJECTS

mikevans@gmail.com ▼

DASHBOARD ←

Welcome Back Evans HVAC!

## Quick Tasks



Review New  
Projects



View Project  
Calendar

## Upcoming Work Schedule

[View Project Calendar](#)

Active Programs

Activity Feed

# P3 Enrollments



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Program List

Welcome Back

Enrollments

## Quick Tasks



Review New  
Projects



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## Upcoming Work Schedule

[View Project Calendar](#)

## Active Programs

## Activity Feed



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PROGRAM LIST

ENROLLMENTS

## Enrollments

+ New Enrollment

Print Excel CSV

Show 10 entries

### Program Enrollments

ID	Program	Status	Created	Submitted	Approval Amount	Submitted Amount
No data available in table						

Showing 0 to 0 of 0 entries

Previous Next



# P3 Enrollments

The screenshot displays the 'P3 Enrollments' web interface. A modal window titled 'New Enrollment' is open, featuring a 'Select Program' dropdown menu. The dropdown is currently open, showing three options: '- Select -' (highlighted in blue), 'Residential Standard Offer Program', and 'Residential Hard-to-Reach Program'. The background interface includes a '+ New Enrollment' button, a 'Show 10 entries' selector, a table with columns for 'ID' and 'Program', and a 'Submitted' column. A search bar and pagination controls ('Previous', 'Next') are also visible. The user's email 'msmith@gmail.com' is shown in the top right corner.



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PROGRAM LIST

ENROLLMENTS

## Enrollment Details

### Residential Standard Offer Program

Enrollment ID: 20058

Submission Star... 1/23/2016 12:00:00 AM

Created: 10/28/2016 (M.Evans)

Submitted:

Current Status: **Created**

### Market Actor Information Summary

Company Name: Evans HVAC

Company DBA:

Contact Name: Mike Evans

Phone: (555)555-5555

Physical Address: 123 Main Street Austin, TX 78746

[View Company Profile](#)

## Enrollment Form

## Enrollment Application

If yes, I have uploaded my subcontractor information under my company profile.

Please list the contractors that you will be using (separated by commas). \*

## Affiliated Firms

Does your company have any affiliated firms? \*

1.  Yes

2.  No

If yes, I have uploaded my affiliated firms information under my company profile.

## Insurance Acknowledgement

I acknowledge that my Certificate of Insurance must be sent directly to the Program Administrator by my insurance company agency with TNMP listed as an additional insured. \*



Save

Submit

HOME

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Your enrollment has been submitted

## Enrollments

[+ New Enrollment](#)

[Print](#) [Excel](#) [CSV](#)

Show  entries

### Program Enrollments

ID	Program	Status	Created	Submitted	Approval Amount	Submitted Amount
20058	Residential Standard Offer Program	Submitted	10/28/2016	10/28/2016		\$0.00

Showing 1 to 1 of 1 entries

[Previous](#) [1](#) [Next](#)

# Res and HTR SOP Program Resources

● Res Program Information:

[http://entergytexas.com/your\\_home/save\\_money/EE/home-energy-efficient.aspx](http://entergytexas.com/your_home/save_money/EE/home-energy-efficient.aspx)

● HTR Program Information:

[http://entergytexas.com/your\\_home/save\\_money/EE/Home\\_hard\\_to\\_reach.aspx](http://entergytexas.com/your_home/save_money/EE/Home_hard_to_reach.aspx)

● Market Actor Information:

[http://entergytexas.com/your\\_home/save\\_money/EE/reach.aspx](http://entergytexas.com/your_home/save_money/EE/reach.aspx)

● P3 Tracking System URL:

[Eti.P3.EnerTrek.com](http://Eti.P3.EnerTrek.com)

● Please review the following information:

- P3 Training Videos
- 2017 SOP Program Manual
- Texas TRM 4.0
- Customer Acknowledgement and Installation Agreement Forms
- HTR Certification Forms (single and multi-family)
- HERS, HERO or BPI Certification Form

# 10 Minute Break

**Use the webinar toolbar to ask questions.**

# Questions and Answers

**Use the webinar toolbar to ask questions.**