SMECO's Home Performance with ENERGY STAR Program Online Program Application Center Uploading Process

General Instructions

The primary point of contact between your company and **SMECO's Home Performance with ENERGY STAR® Rebate Program** should complete this application process for each customer.

The application process will include the following steps:

- Creating a contractor account for the online system, if you have not done so previously.
- Creating a customer application for whom the work was completed.
- Providing additional application information, including details about the work performed.
- Reviewing and agreeing to the terms and conditions for program participation.
- Uploading required supporting documentation including:

  i. a signed contract between the customer and participating contractor with detailed scope of work,
  ii. signed Terms and Conditions with customer *and* contractor signatures,
  iii. signed Test-Out form,
  iv. any other supporting documentation for equipment or measures installed, and

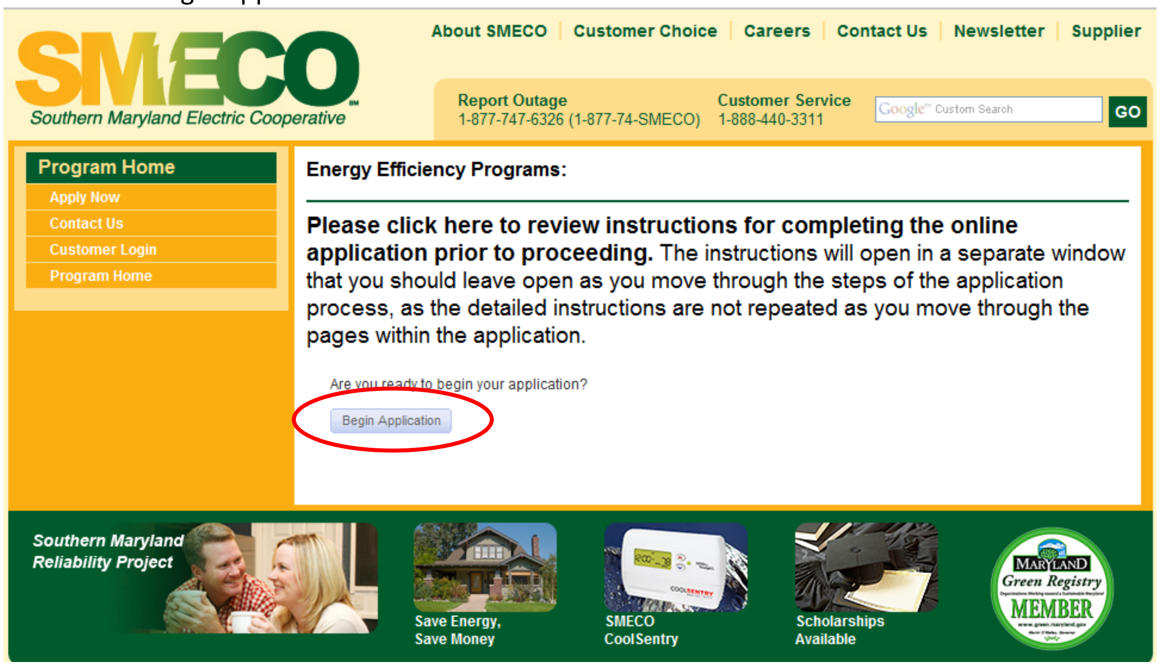
Detailed Instructions

Create a New Account

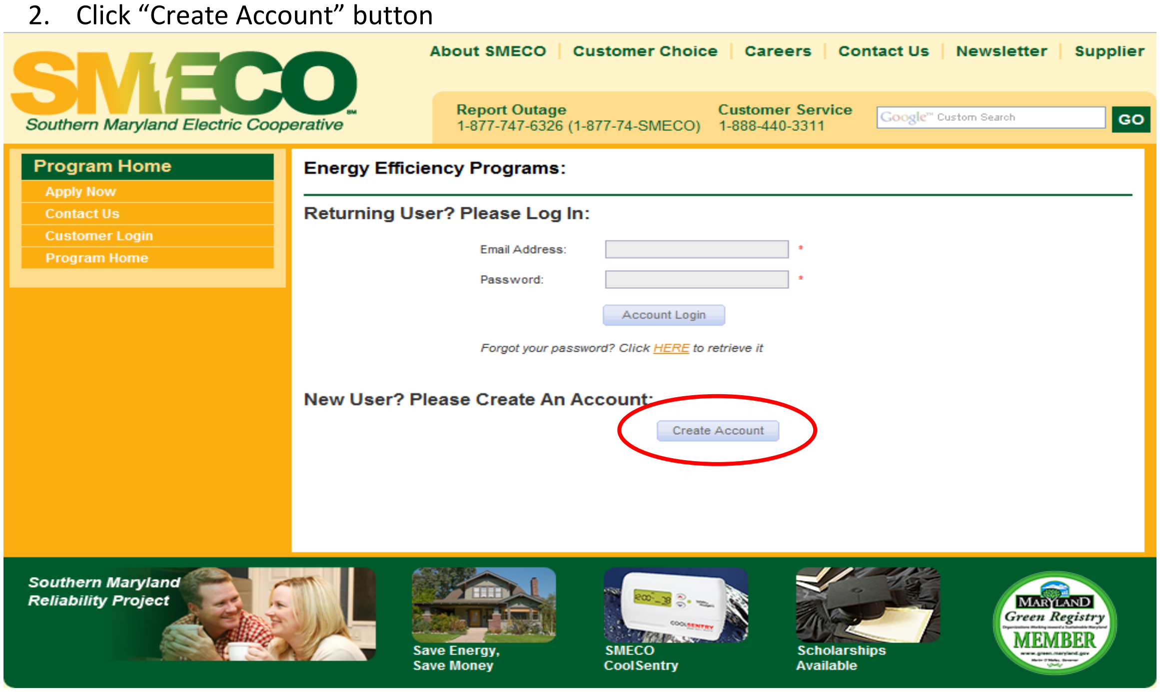
Go to http://smecohpwes.programprocessing.com/programapplication/

Part 1: Creating a New Account

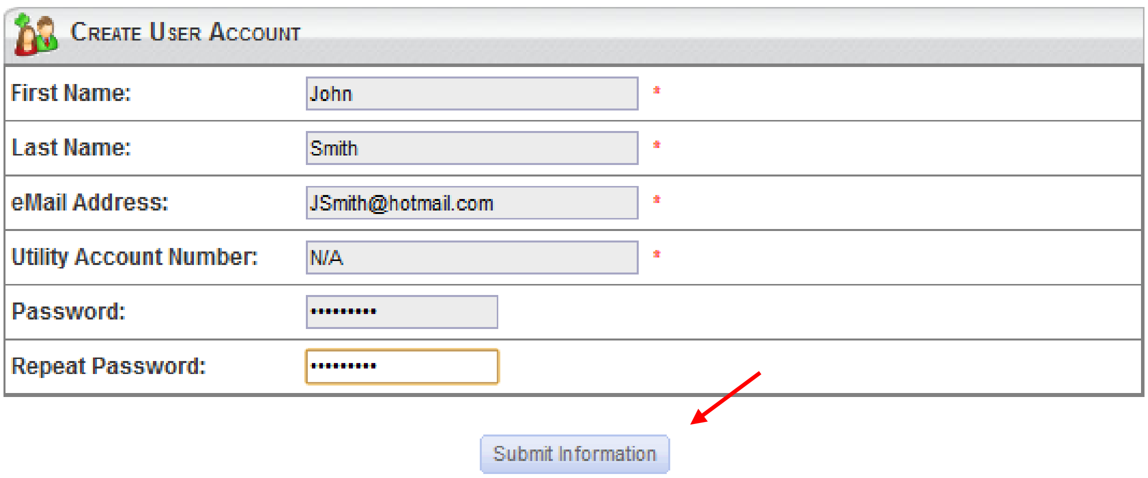
1. Click "Begin Application" button



2. Click "Create Account" button



3. Enter Account information to create your user account for the online system. **Please note the Email Address and Password used to create your account**; after submitting your application you will have the ability to log in to your account using this information to review your application and check its current status.
  - Enter First and Last Name
  - Enter an E-mail Address to which messages about this application should be sent
  - Enter N/A for Utility Account Number
  - Choose a password and enter it into the Password and Repeat Password fields
  - Select "Submit Information" button

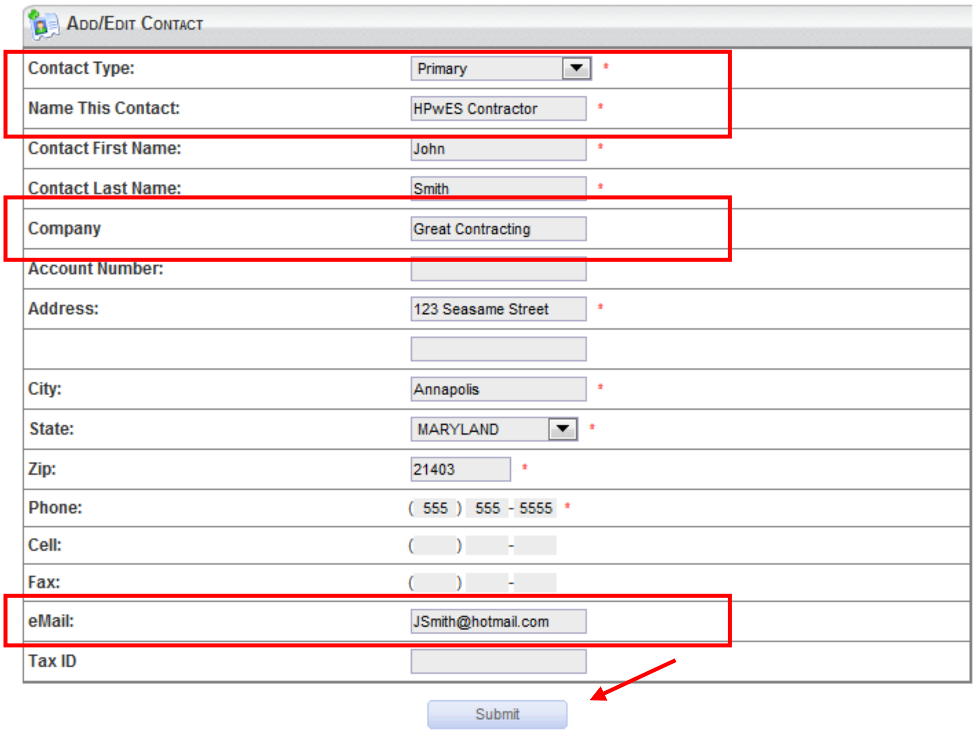


Part 2: Adding Contact Information

1. Provide contact information for the **Primary Contact**. The primary contact is **the individual who should be contacted with questions about the application**.
  - Select contact type "Primary"
  - For Name This Contact, enter **HP Contractor** or any other name to distinguish between persons within your company (use HP Contractor if you will be the only one entering information on a given record, use the Auditors name if there will be multiple accounts used to upload information to the record.)
  - Enter Contact First Name and Contact Last Name
  - Enter your Company Name
  - Leave Account Number blank
  - Enter your company's Address, City, State, and Zip
  - Enter your Phone number. If desired, provide an alternate phone number in the Cell field and a fax number in the Fax field
  - Enter an E-mail Address. **This is the e-mail address to which correspondence regarding the application will be sent. Failure to enter an e-mail address may result in delays processing your application should we need to contact you.** (Messages sent by the system will come from the e-mail address donotreply@programprocessing.com. Please

add this e-mail address to the approved contacts list for your e-mail program to ensure that e-mails sent by the system are not routed to your junk e-mail or spam folders.)

- Leave Tax ID blank
- Click “Submit”



2. You are now ready to begin a rebate application.

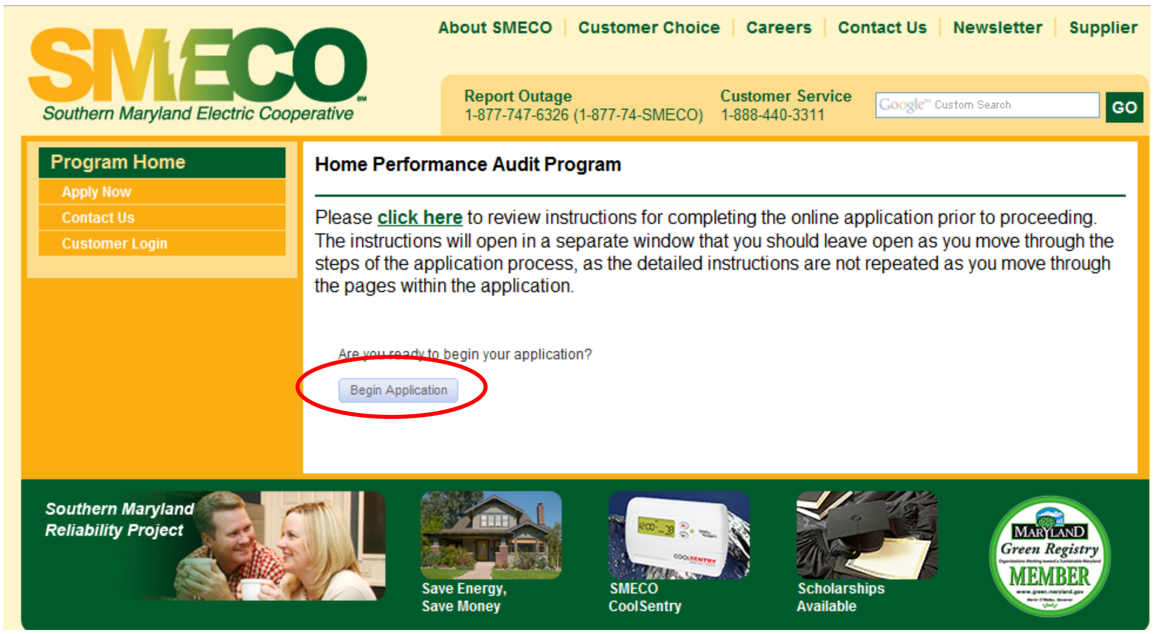
NOTE: You will only need to create (1) user account for both the Audit and Project Portals.

Create a new <u>Audit</u> Application

Go to
http://smecohpwesaudit.programprocessing.com/programapplication/

Part 1: Logging In

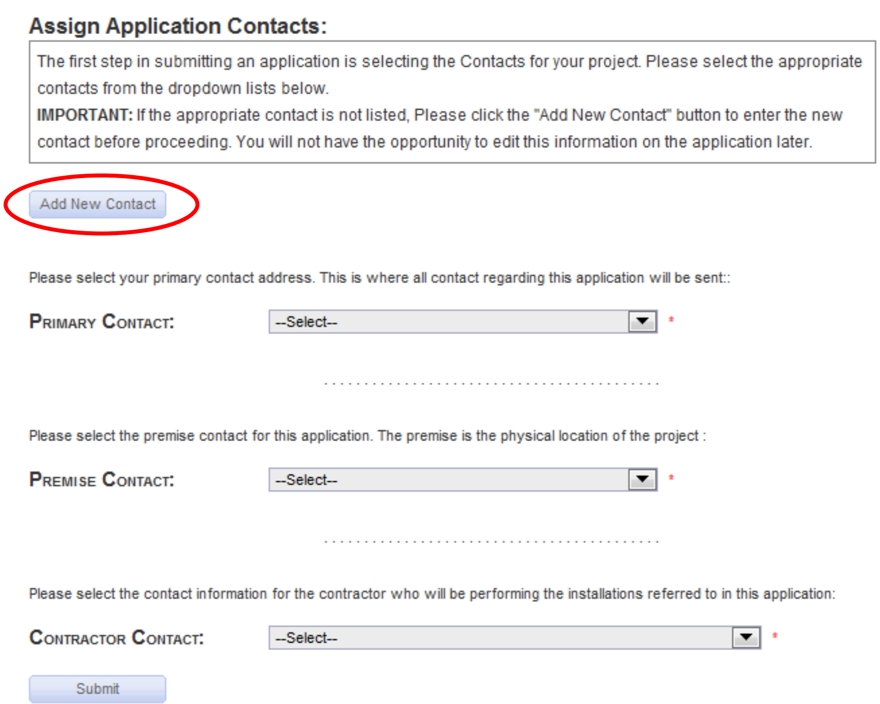
1. Click “Begin Application”



2. Enter your e-mail address used to create the account in the “Returning User?” section
3. Enter your password
   - **If you have forgotten your password**, use the link below the log-in fields to retrieve it. This will trigger the system to e-mail you a new password.
   - Please **add the e-mail address** donotreply@programprocessing.com to your approved contacts list to ensure that you receive the e-mail containing the new password.
   - You may **change your password after logging on** by clicking the “Edit Your Profile” link in the top right of the Program Application Center – Welcome tab.
4. Click “Account Login”

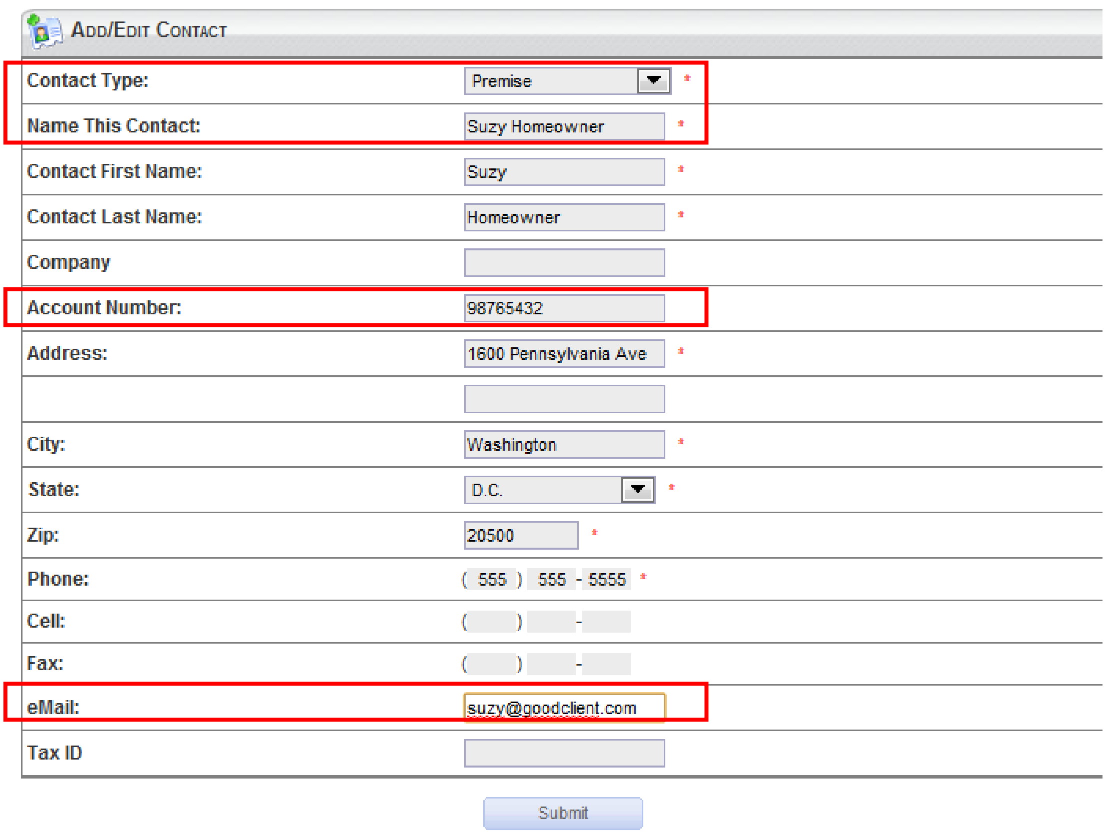
Part 2: Adding Contact Information

1. Click “Add New Contact” to enter new customer information



2. Provide contact information for the **Premise Contact**. The premise contact is **the customer for whom home performance measures were installed**.

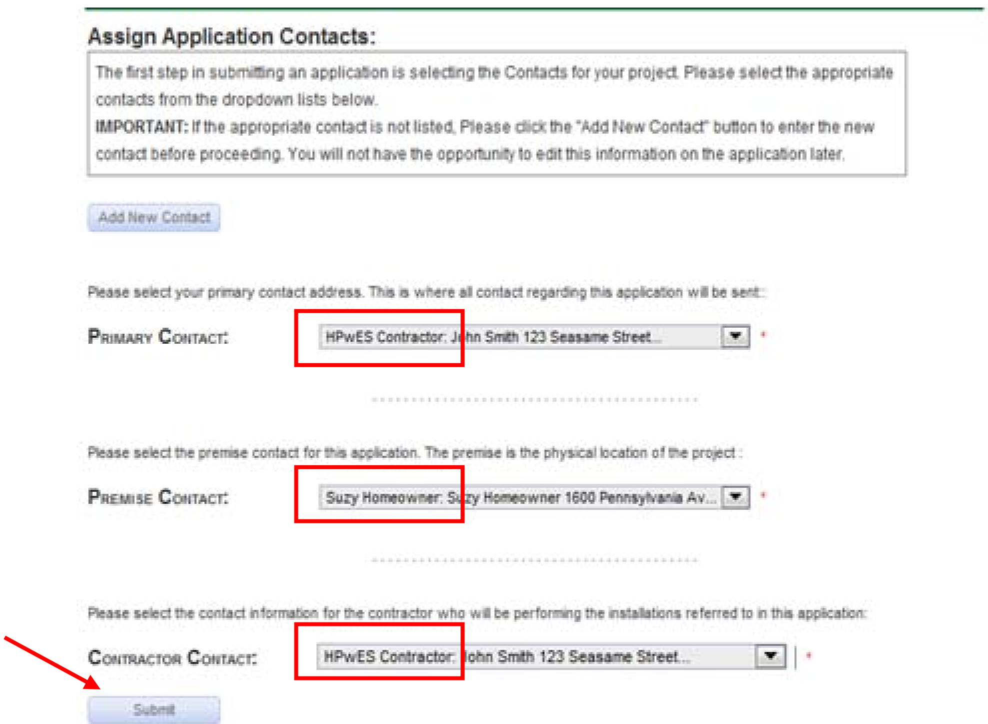
- Select contact type "Premise"
- For Name This Contact, enter the customer's name
- Enter customer's information for Contact First Name and Contact Last Name
- Leave company name blank
- Enter customer's SMECO account number
- Enter customer's Address, City, State, and Zip (home where measures were installed)
- Enter customer's Phone Number. If desired, provide an alternate phone number in Cell field
- Leave Fax blank
- Enter customer's E-mail address. This is requested for two reasons: 1) to inform the customer of their rebate amount once it has been approved and 2) to send out surveys to all customers once their rebate has been processed in order to evaluate their experience with the program.
- Leave Tax ID blank
- Click "Submit"


ADD/EDIT CONTACT

Contact Type:	Premise *
Name This Contact:	Suzy Homeowner *
Contact First Name:	Suzy *
Contact Last Name:	Homeowner *
Company	
Account Number:	98765432
Address:	1600 Pennsylvania Ave *
City:	Washington *
State:	D.C. *
Zip:	20500 *
Phone:	(555) 555 - 5555 *
Cell:	( ) -
Fax:	( ) -
eMail:	suzy@goodclient.com
Tax ID	

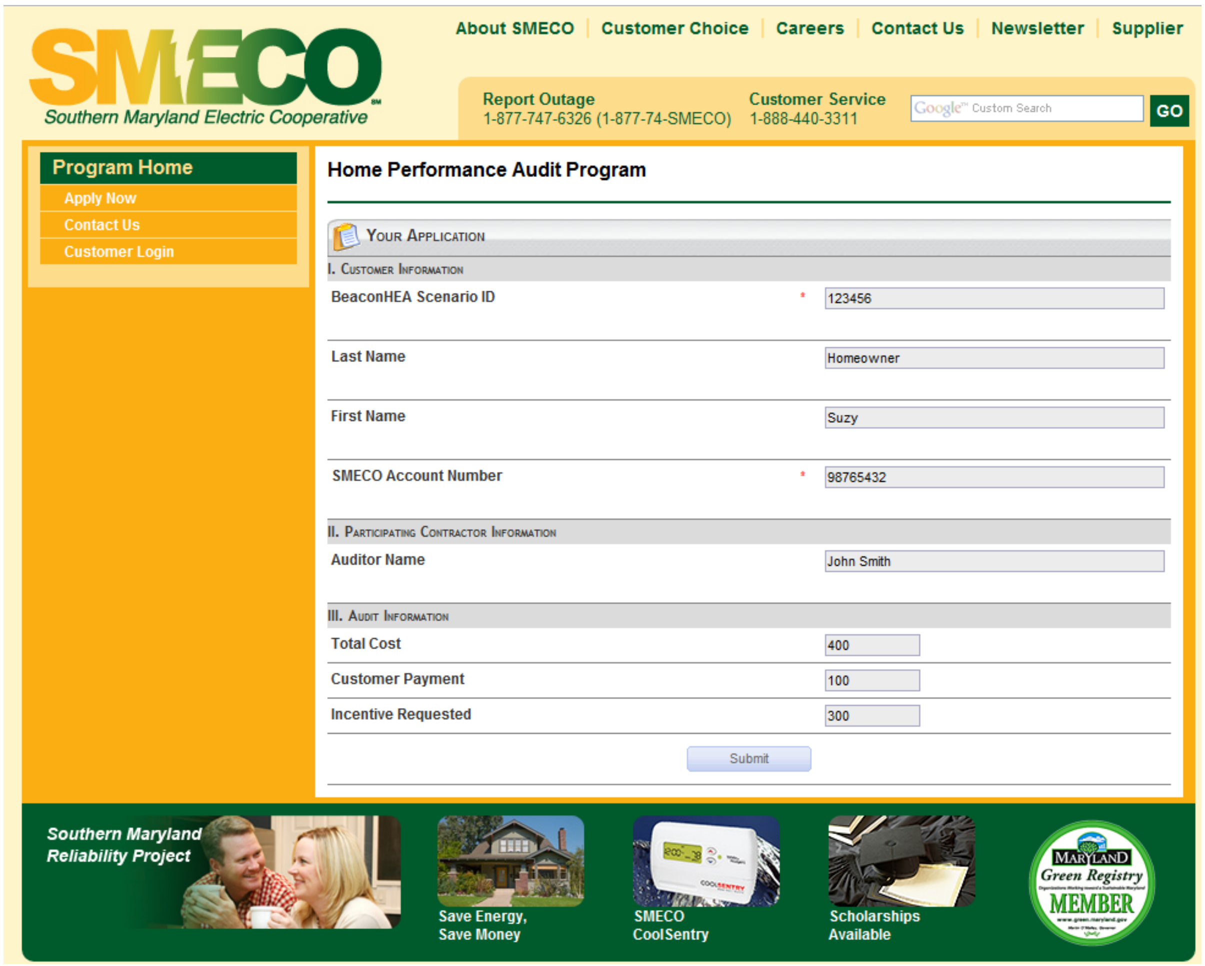
Submit

3. On the Assign Application Contacts screen:
   - Select the **contractor** (entered in step 4) from the **Primary Contact** drop down list
   - Select the **customer** (entered in step 6) from the **Premise Contact** drop down list
   - Select **your company's name** from the **Contractor** drop down list
4. Click "Submit"



Part 3: Entering Audit Information

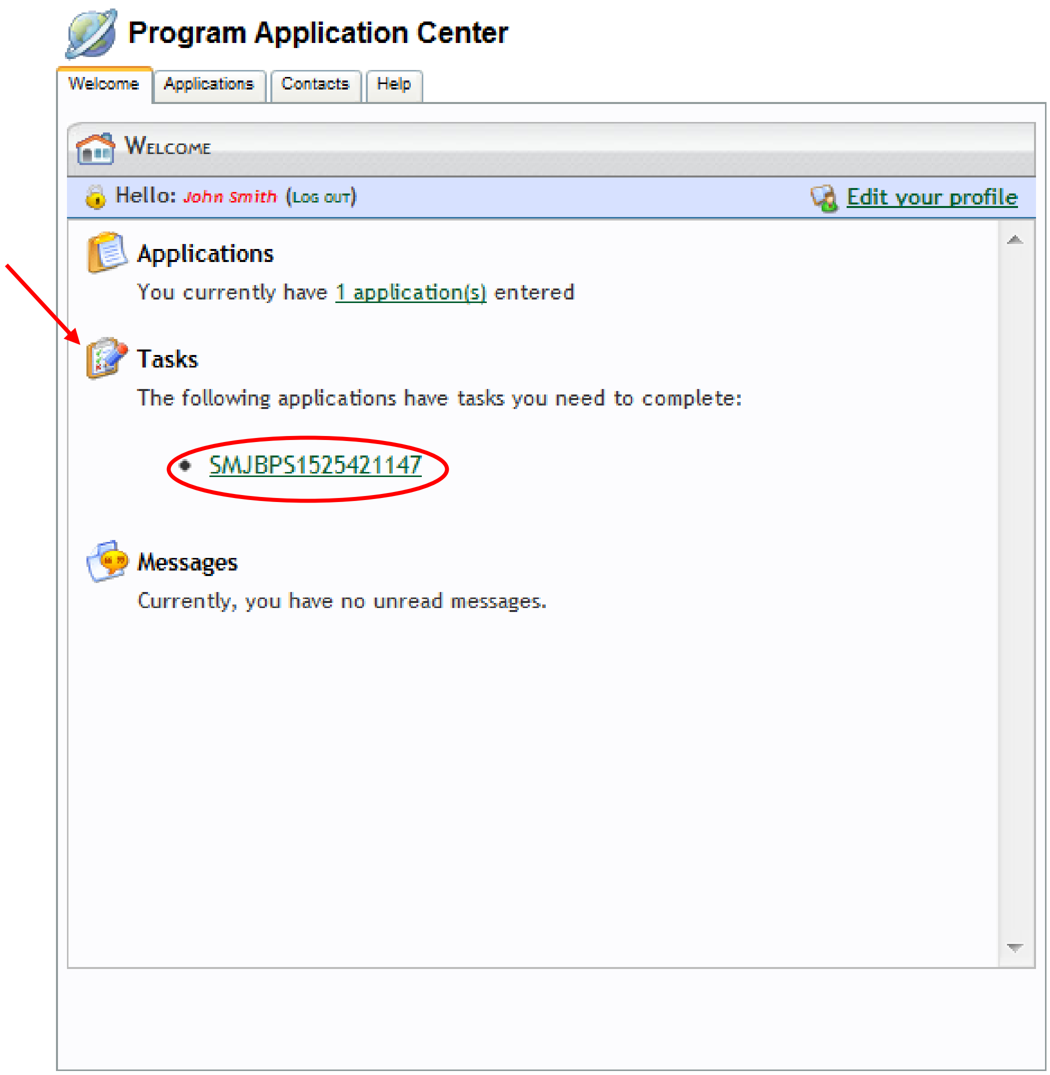
1. Enter Beacon HEA Scenario ID
2. Enter Customer's Last Name
3. Enter Customer's First Name
4. Enter Customer's SMECO Account Number
5. Enter Auditor's Full Name
6. Enter Total Cost of Audit
7. Enter Total Amount Paid By Customer
8. Enter Incentive Requested ($300)



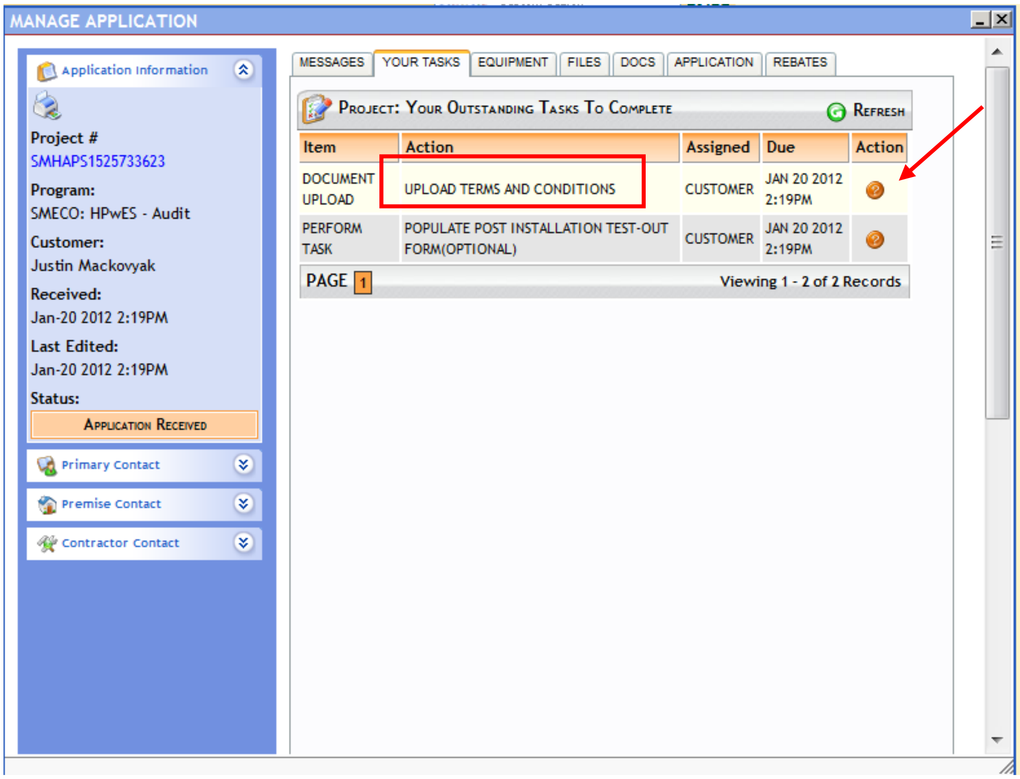
Part 4: Uploading Files

Following the submittal of the application page, you will be forwarded to the Program Application Center - Welcome page. This page will indicate that you have tasks to complete for the application you submitted.

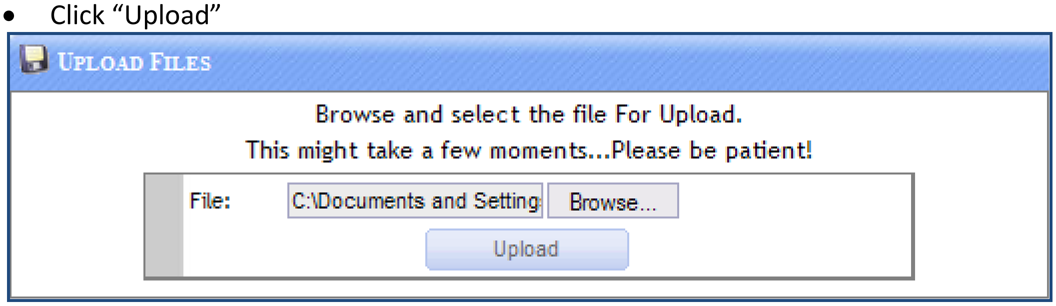
1. Click the hyperlink under the "Tasks" header to access your application for which you will upload required supporting documentation
   <u>NOTE</u>: Failure to upload the required supporting documentation will result in delays processing your application



2. The “Your Tasks” tab of the Manage Application screen will be displayed
3. Click the “?” icon in the Action column next to the “UPLOAD TERMS AND CONDITIONS” task. This will open the Upload Files window



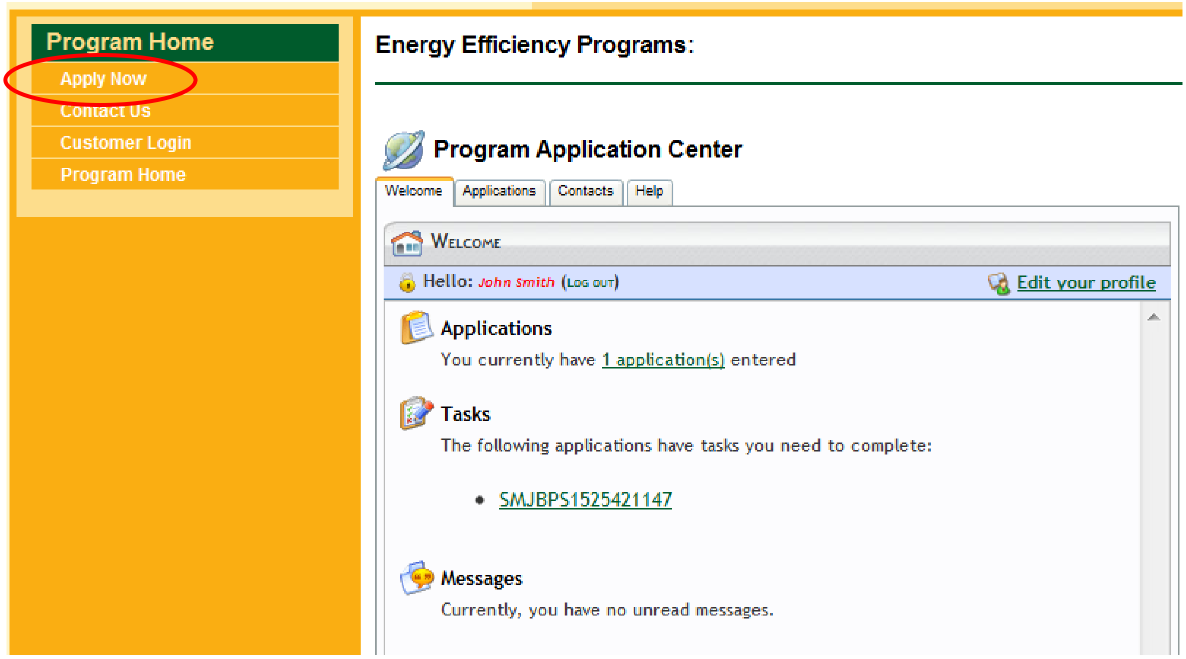
- Click “Browse”
- Navigate to the location of your worksheet on your computer
- Select the form
  <u>NOTE</u>: Please name your files according to their content (e.g. “Suzy Homeowner Terms and Conditions” or “Suzy Homeowner T&C”). This will help us easily determine if all paperwork requirements are met.
- Click “Upload”



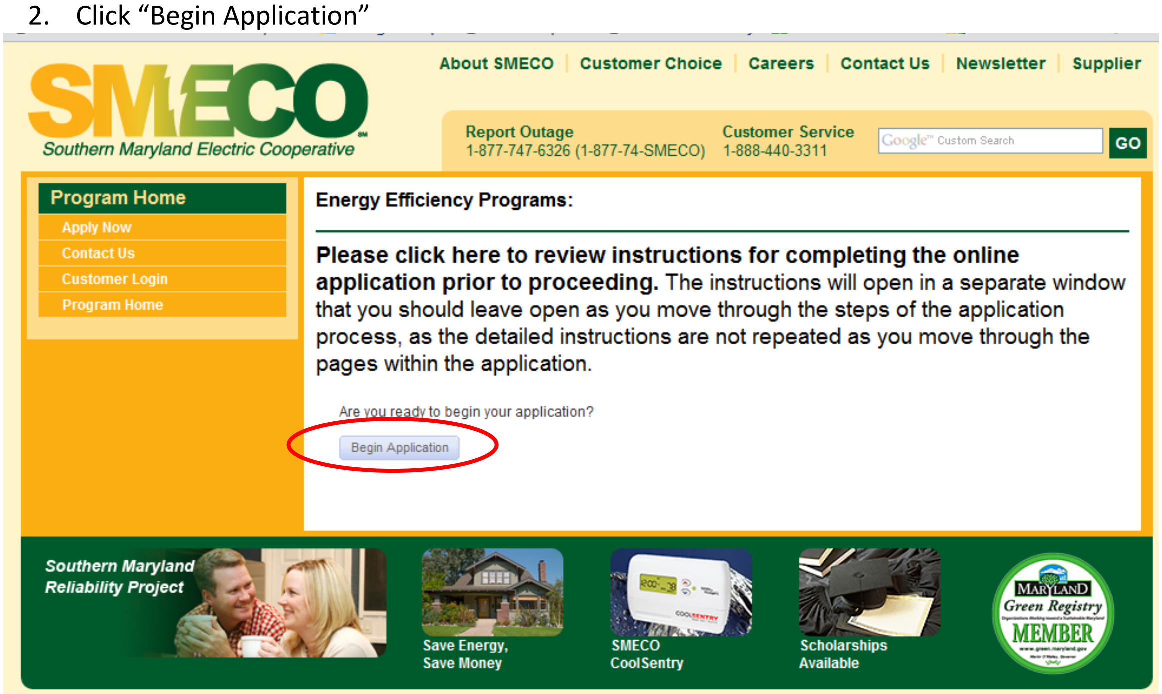
4. When finished uploading documents and sending the note, click the “x” in the upper right hand corner of the customer’s project screen to close the window
5. If you want to enter a new application, go to Part 5: Adding a New Application on the next page.
6. If you are finished with the Program Application Center, log out of the online system using the “LOG OUT” hyperlink on the Welcome tab, or simply close your browser

Part 5: Adding a New Application

1. Click “Apply Now” located on the left of your screen in the blue menu box



2. Click “Begin Application”



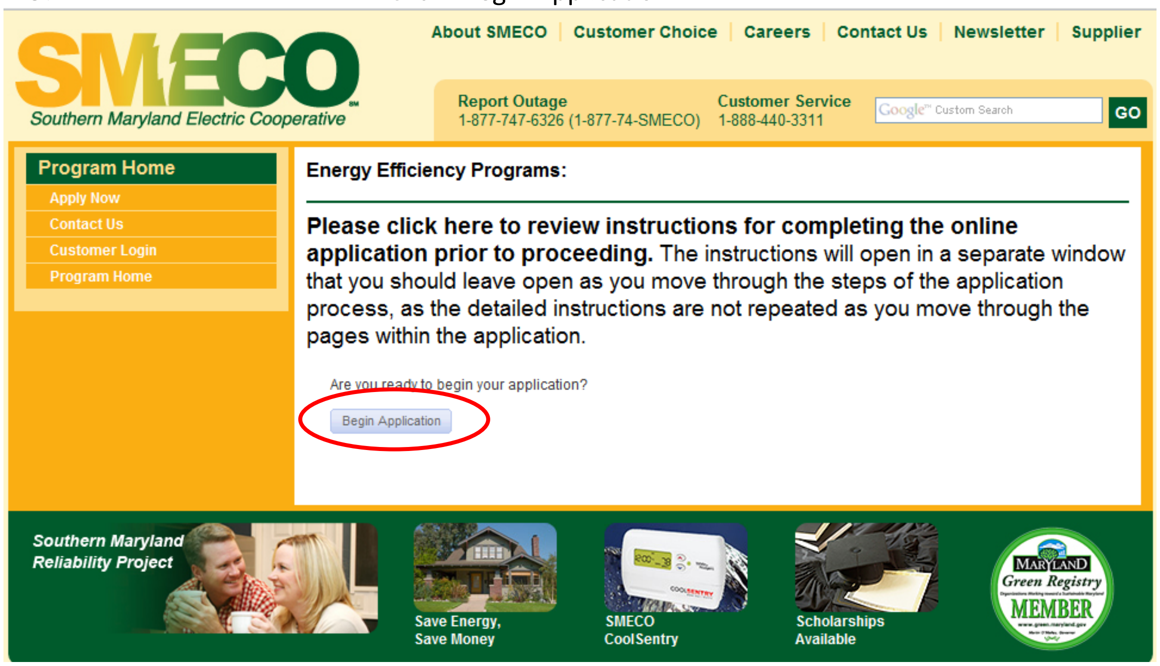
3. Repeat process beginning at Part 2: Adding Contact Information

Create a New Project Rebate Application

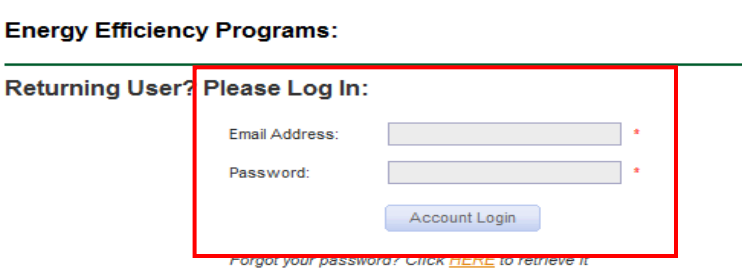
Go to http://smecohpwes.programprocessing.com/programapplication/

Part 1: Logging In

5. Click “Begin Application”

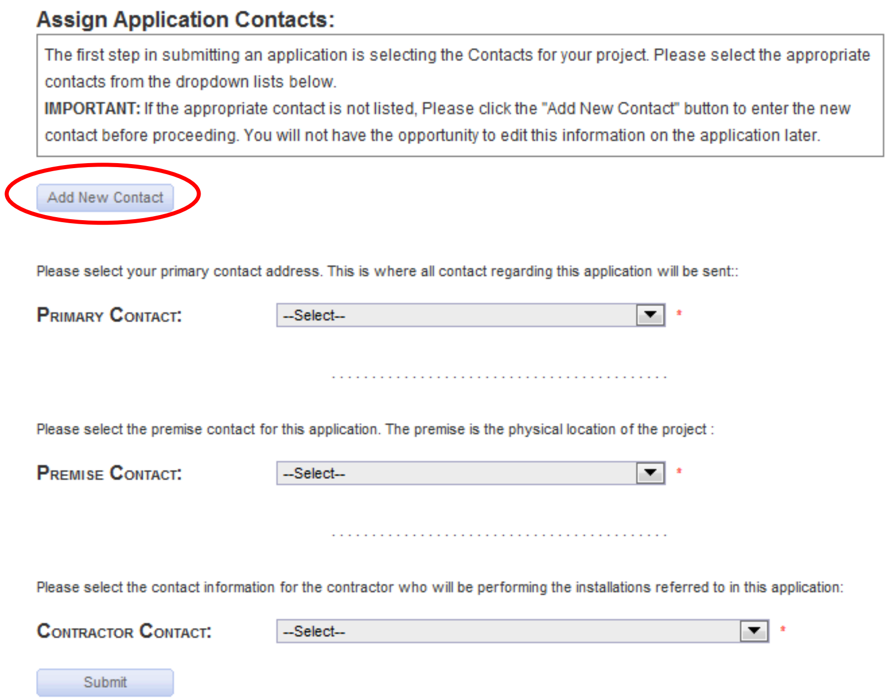


6. Enter your e-mail address used to create the account in the “Returning User?” section
7. Enter your password
   - **If you have forgotten your password**, use the link below the log-in fields to retrieve it. This will trigger the system to e-mail you a new password.
   - Please **add the e-mail address** donotreply@programprocessing.com to your approved contacts list to ensure that you receive the e-mail containing the new password.
   - You may **change your password after logging on** by clicking the “Edit Your Profile” link in the top right of the Program Application Center – Welcome tab.
8. Click “Account Login”

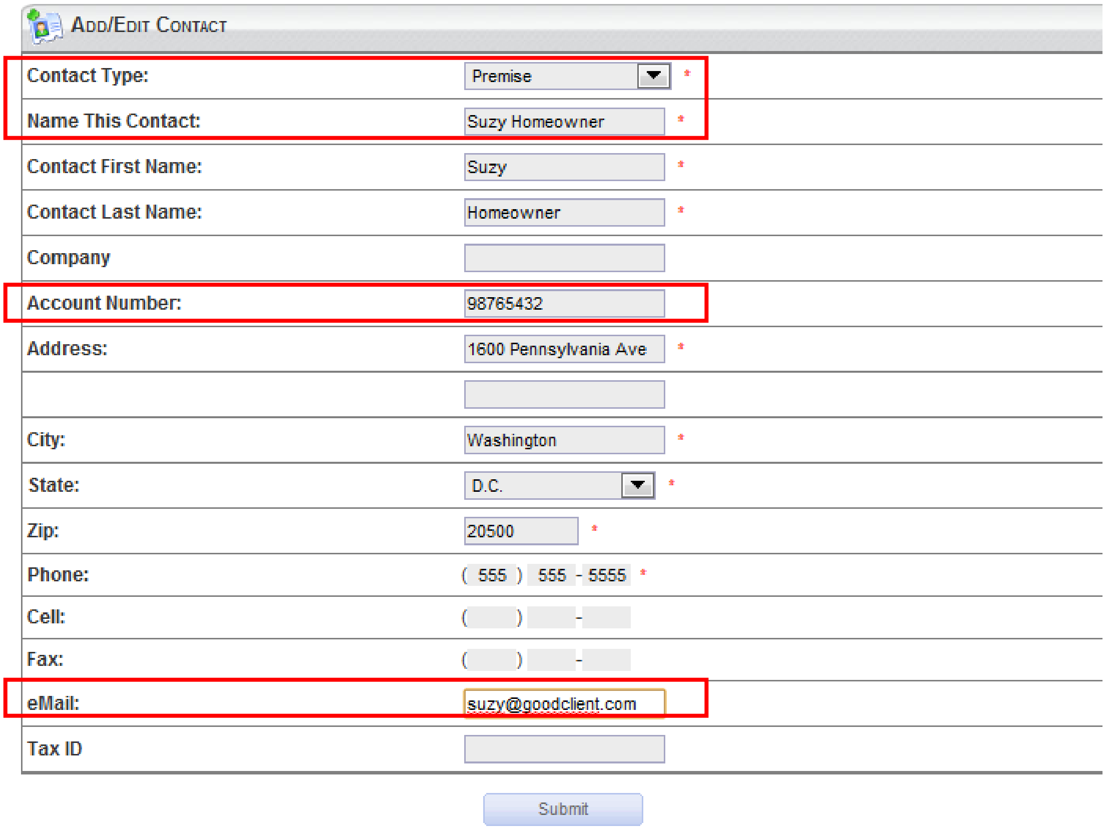


9. Click “Add New Contact” to enter new customer information

Part 2: Adding Contact Information



1. Provide contact information for the **Premise Contact**. The premise contact is **the customer for whom home performance measures were installed**.
   - Select contact type “Premise”
   - For Name This Contact, enter the customer’s name
   - Enter customer’s information for Contact First Name and Contact Last Name
   - Leave company name blank
   - Enter customer’s SMECO account number
   - Enter customer’s Address, City, State, and Zip (home where measures were installed)
   - Enter customer’s Phone Number. If desired, provide an alternate phone number in Cell field
   - Leave Fax blank
   - Enter customer’s E-mail address. This is requested for two reasons: 1) to inform the customer of their rebate amount once it has been approved and 2) to send out surveys to all customers once their rebate has been processed in order to evaluate their experience with the program.
   - Leave Tax ID blank
   - Click “Submit”

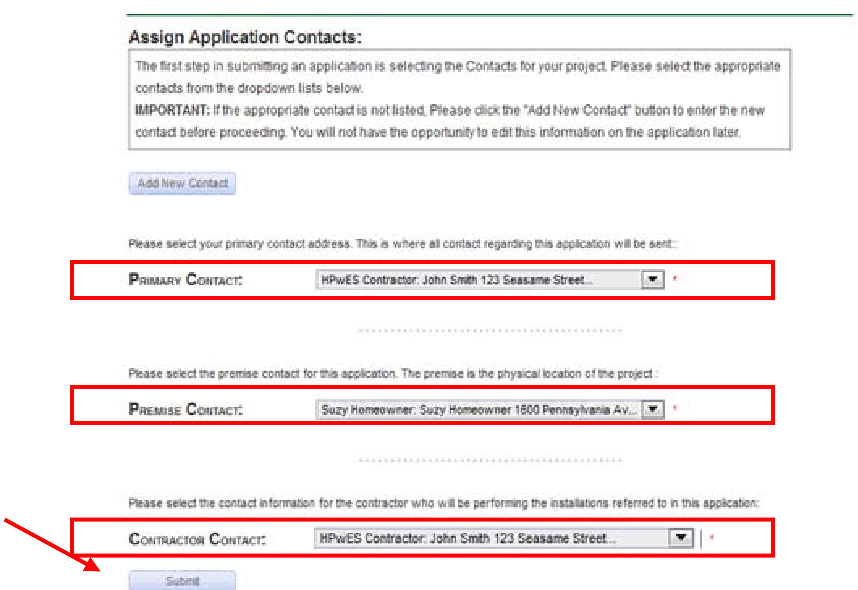


ADD/EDIT CONTACT

Contact Type:	Premise *
Name This Contact:	Suzy Homeowner *
Contact First Name:	Suzy *
Contact Last Name:	Homeowner *
Company	
Account Number:	98765432
Address:	1600 Pennsylvania Ave *
City:	Washington *
State:	D.C. *
Zip:	20500 *
Phone:	(555) 555 - 5555 *
Cell:	( ) -
Fax:	( ) -
eMail:	suzy@goodclient.com
Tax ID	

Submit

2. On the Assign Application Contacts screen:
   - Select the **contractor** (entered in step 4) from the **Primary Contact** drop down list
   - Select the **customer** (entered in step 6) from the **Premise Contact** drop down list
   - Select **your company's name** from the **Contractor** drop down list
3. Click "Submit"



Assign Application Contacts:

The first step in submitting an application is selecting the Contacts for your project. Please select the appropriate contacts from the dropdown lists below.
IMPORTANT: If the appropriate contact is not listed, Please click the "Add New Contact" button to enter the new contact before proceeding. You will not have the opportunity to edit this information on the application later.

Add New Contact

Please select your primary contact address. This is where all contact regarding this application will be sent:

PRIMARY CONTACT: HPwES Contractor: John Smith 123 Seasame Street... *

Please select the premise contact for this application. The premise is the physical location of the project :

PREMISE CONTACT: Suzy Homeowner: Suzy Homeowner 1600 Pennsylvania Av... *

Please select the contact information for the contractor who will be performing the installations referred to in this application:

CONTRACTOR CONTACT: HPwES Contractor: John Smith 123 Seasame Street... *

Submit

Part 3: Entering Application Information

1. Fill in information for all sections on the "Your Application" page

   I. Customer Information – Be sure to enter all fields: SMECO Customer Type, House Type, Primary Heating and Cooling Systems, and Mailing information

Your Application

I. Customer Information

Customer Type:	*	Electric
House Type:		Single Family
Primary Heating and Cooling Systems (Check all appropriate):	*	☐ Central AC ☑ Heat Pump ☐ Gas Furnace ☐ Gas Boiler ☐ Propane Heat ☐ Oil Heat ☐ Electric Resistance Heat ☐ Other Electric Heat
Mailing Address		1600 Pennsylvania Ave
Mailing City		Washington
Mailing State		D.C.
Mailing Zip Code		20500

   II. Participating Contractor Information

- Enter the name of the person who conducted the audit

II. Participating Contractor Information

Auditor Name	*	John Smith

   III. Audit, Air Sealing, Insulation and Water Heating

- Enter total measure cost and rebate amount requested for the customer for each component
- Rebate for Comprehensive HEA: up to $250 of the total cost of the audit; if total audit cost is less than $250, the customer will receive the price of the audit.
- Rebate for Air Sealing/Insulation: 15% of total cost

III. Audit, Air Sealing, Insulation, and Water Heating

Comprehensive Home Energy Audit	
Measure Cost	250.00
Rebate Payment	250.00
Air Sealing and Insulation	
Measure Cost	1000.00
Rebate Payment	150.00
Gas Tankless Water Heater (ENERGY STAR)	
Measure Cost	0.00
Rebate Payment	0.00

IV. HVAC

- Enter Quantity and Rebate Payment for each applicable measure
- For Rebate amounts please review the Rebate Worksheet or Rebate Incentive Instructions packet
- **NOTE:** If HVAC work is performed and rebates are requested, additional documentation may be necessary.

  Please review the following documentation requirements:

  1. Signed contract between the customer and participating contractor with detailed scope of work. Contract must include all eligible improvement details including R-values, air infiltration, duct leakage, equipment efficiency, manufacturer, model numbers, serial numbers, AHRI reference number, and any other relevant information.

IV. HVAC

Central A/C Tier 1: >=14.5 SEER and >=12 EER	
Quantity	
Rebate Payment	
Central A/C Tier 2: >=15 SEER and >=12.5 EER	
Quantity	
Rebate Payment	
Heat Pump Tier 1: >=14 SEER and >=11.5 EER and >=8.5 HSPF	
Quantity	
Rebate Payment	
Heat Pump Tier 2: >=15 SEER and >=12.5 EER and >=8.5 HSPF	
Quantity	
Rebate Payment	
Gas Furnace Tier 1: >=92% AFUE	
Quantity	
Rebate Payment	
Gas Furnace Tier 2: >=92% AFUE w/ECM or ICM	
Quantity	
Rebate Payment	
Duct Sealing (50% reduction to unconditioned space)	
Quantity	1
Rebate Payment	200.00
Quality Installation Verification	
Quantity	
Rebate Payment	
HVAC Tune-up	
Quantity	
Rebate Payment	

V. Direct Install Measures

- Direct install measures should be offered to all customers applying for SMECOS's HPwES Rebate Program
- If direct install measure is **accepted by the customer**, enter quantity in the respective measure field.

V. Direct Install Measures	
Compact Fluorescent Light bulbs (ENERGY STAR)	
Quantity	
Measure Cost	
Rebate Payment	
Water Heater Tank Wrap (R-6.7)	
Quantity	
Measure Cost	
Rebate Payment	
Pipe Insulation	
Quantity	
Measure Cost	
Rebate Payment	
Efficient-flow Showerhead (1.8 gpm)	
Quantity	
Measure Cost	
Rebate Payment	
Smart Strips	
Quantity	
Measure Cost	
Rebate Payment	

VI. Incentive Requested

- Enter the total cost of the installed measures
- Enter the total incentives requested from the above sections.

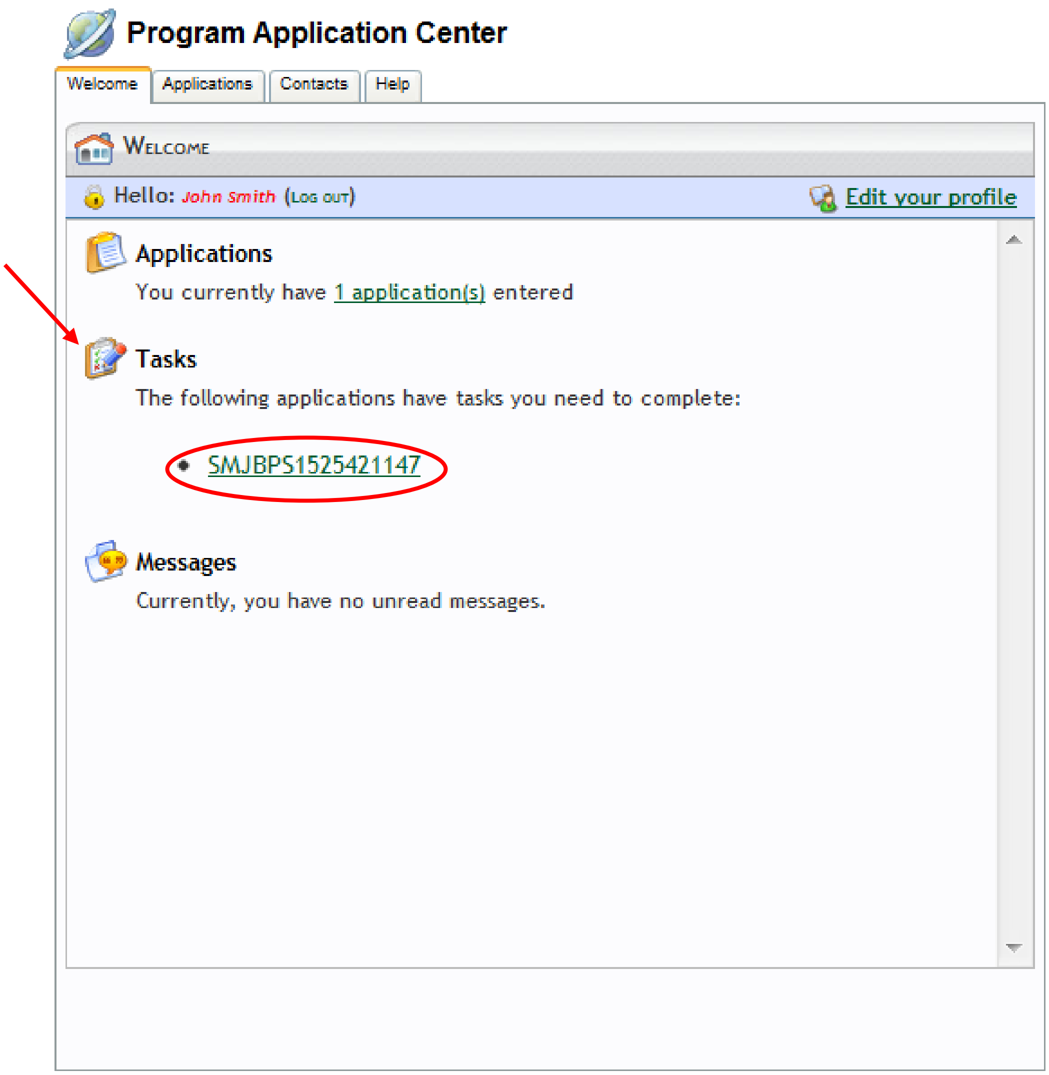
VI. Incentive Requested and Payment Option		
Total Cost	*	1250
Total Eligible Rebate	*	400
Paid to	*	Customer

2. Click "Submit"

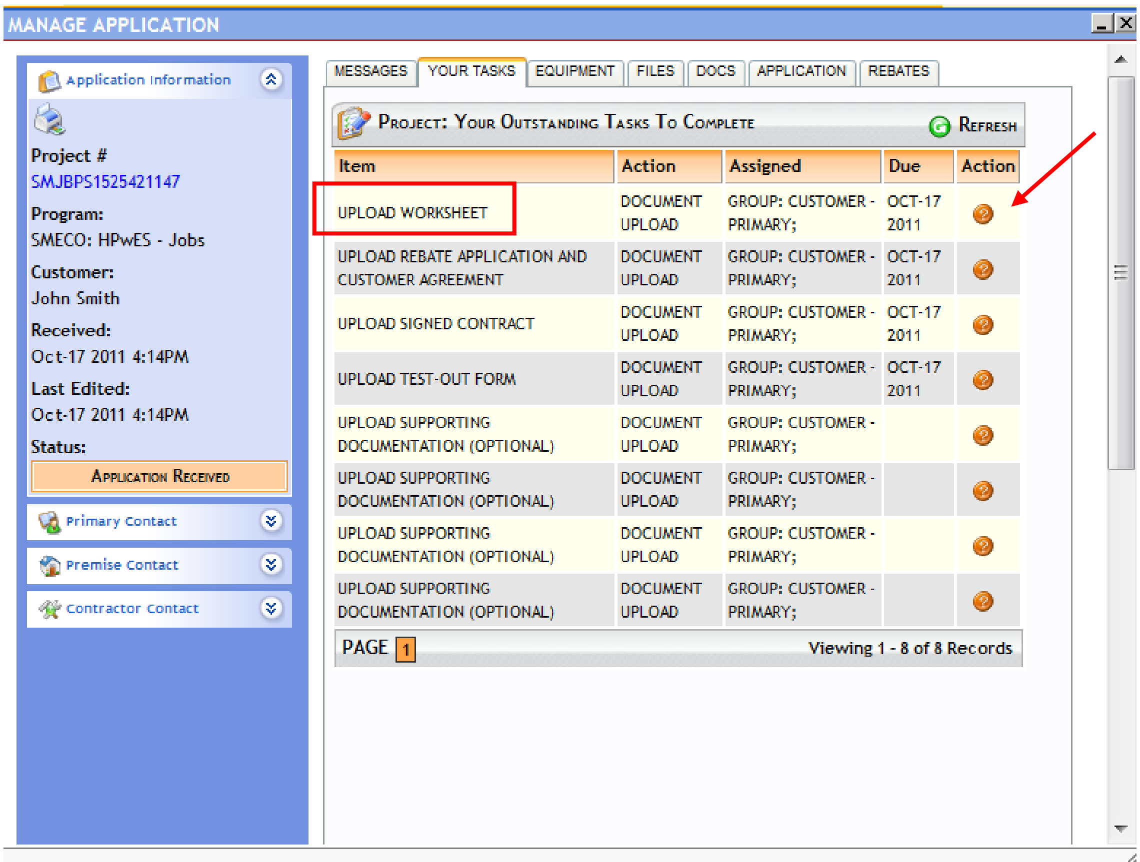
Part 4: Uploading Files

Following the submittal of the application page, you will be forwarded to the Program Application Center - Welcome page. This page will indicate that you have tasks to complete for the application you submitted.

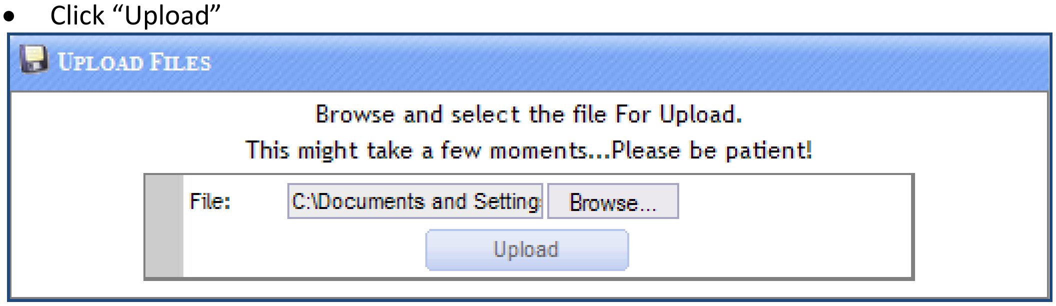
1. Click the hyperlink under the "Tasks" header to access your application for which you will upload required supporting documentation
   <u>NOTE</u>: Failure to upload the required supporting documentation will result in delays processing your application



2. The “Your Tasks” tab of the Manage Application screen will be displayed
3. Click the “?” icon in the Action column next to the “UPLOAD WORKSHEET” task. This will open the Upload Files window

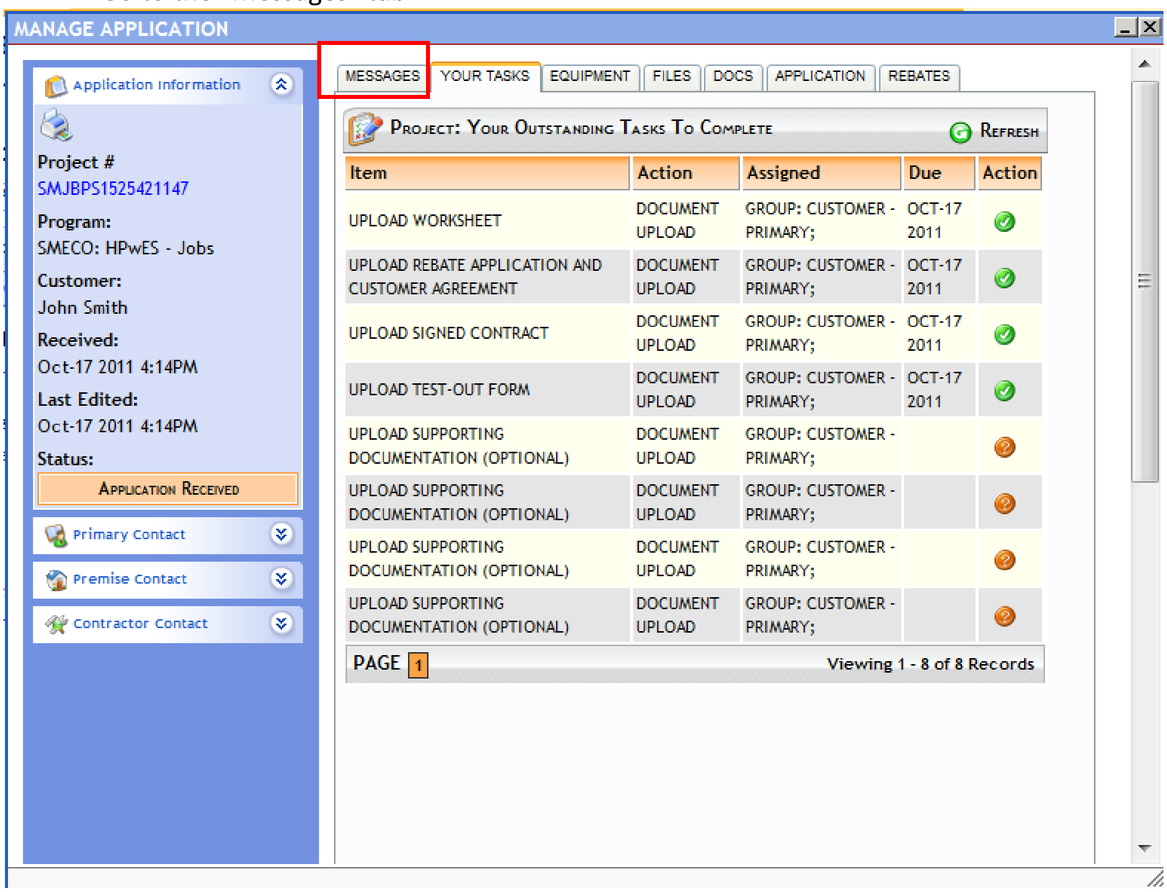


- Click “Browse”
- Navigate to the location of your worksheet on your computer
- Select the form
  <u>**NOTE**</u>**: Please name your files according to their content (e.g. “Suzy Homeowner Insulation Contract” or “Suzy Homeowner Rebate Application”).** This will help us easily determine if all paperwork requirements are met.
- Click “Upload”

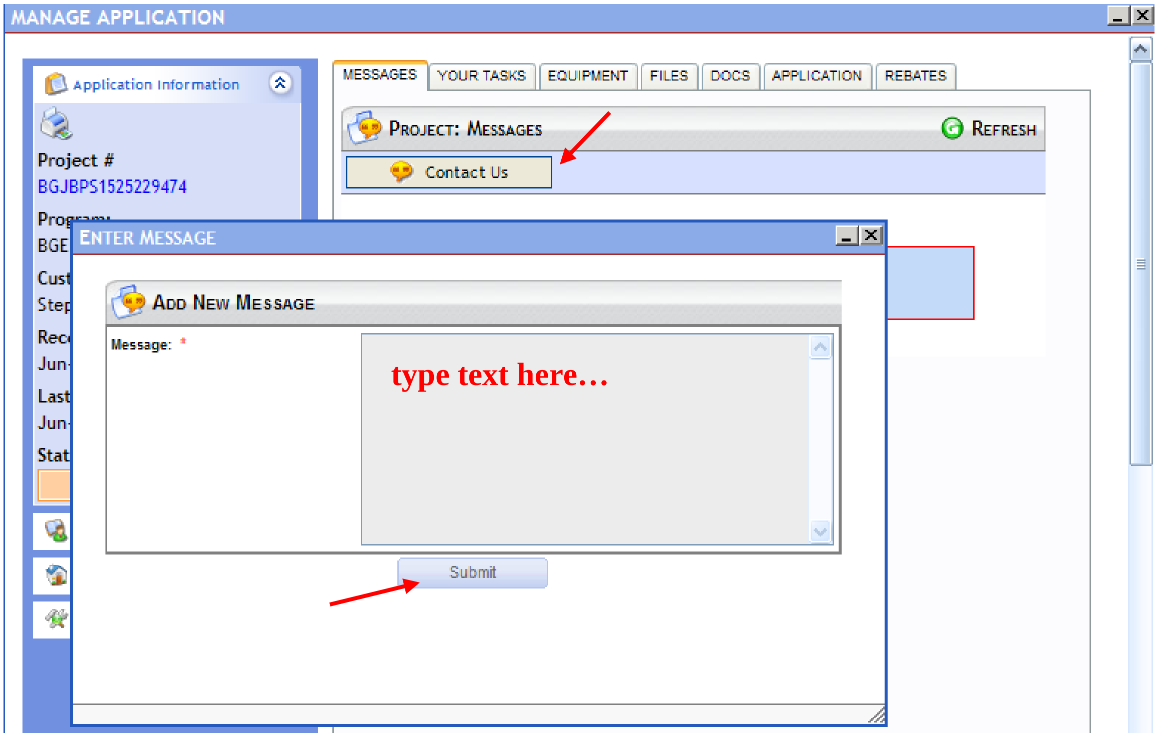


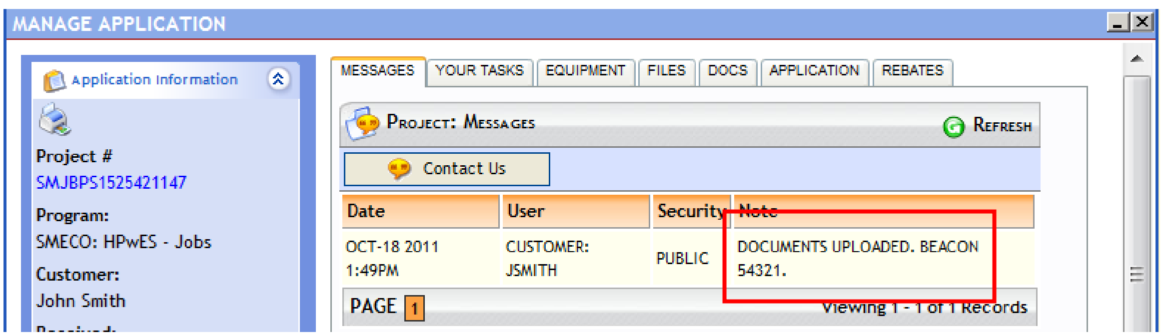
4. Repeat step **3** to upload the following items:
   - customer-signed Terms and Conditions (with customer initials verifying direct install measures were offered)
   - customer and contractor-signed scope of work (contract, work agreement, etc.)
   - Post-Installation Test-Out form
   - any additional supporting documentation which will help us verify any potential questions regarding the customer's application

5. Once all documents have been uploaded, send a note via the online system to let your account manager know that the application is ready to be reviewed
   - Go to the "Messages" tab



   - Click "Contact Us" icon
   - Type a message which includes the Beacon scenario number for the application
   - Click Submit



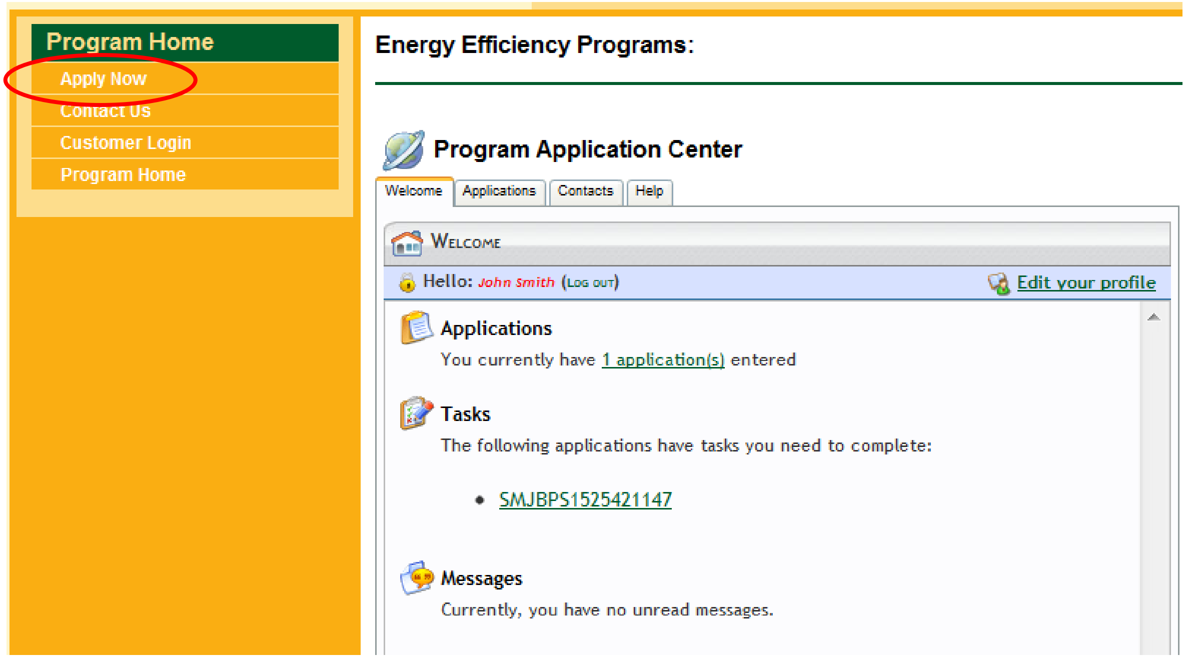


6. When finished uploading documents and sending the note, click the “x” in the upper right hand corner of the customer’s project screen to close the window

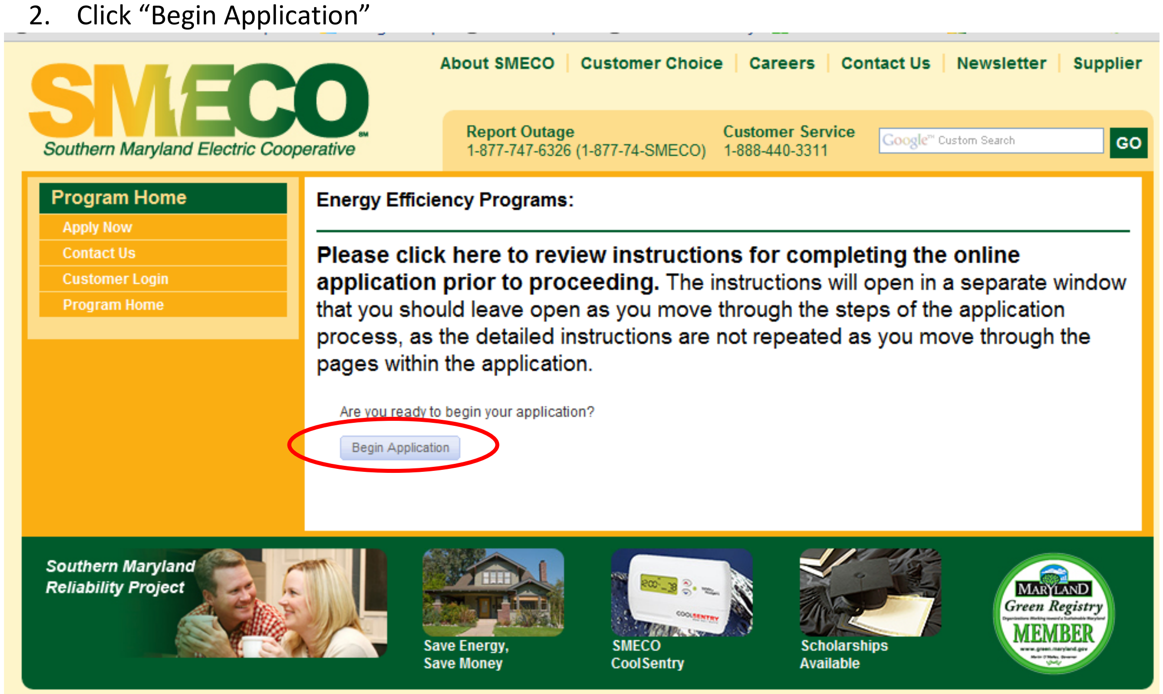
7. If you want to enter a new application, go to Part 5: Adding a New Application on the next page.
8. If you are finished with the Program Application Center, log out of the online system using the “LOG OUT” hyperlink on the Welcome tab, or simply close your browser

Part 5: Adding a New Application

1. Click "Apply Now" located on the left of your screen in the blue menu box



2. Click "Begin Application"



3. Repeat process beginning at Part 2: Adding Contact Information

Managing Submitted Applications

Go to http://smecohpwes.programprocessing.com/programapplication/

Part 1: Logging In

1. Click “Begin Application”
2. Enter your e-mail address used to create the account in the “Returning User?” section
3. Enter your password
   - **If you have forgotten your password**, use the link below the log-in fields to retrieve it. This will trigger the system to e-mail you a new password.
   - Please **add the e-mail address** donotreply@programprocessing.com to your approved contacts list to ensure that you receive the e-mail containing the new password.
   - You may **change your password after logging on** by clicking the “Edit Your Profile” link in the top right of the Program Application Center – Welcome tab.
4. Click “Account Login”

Part 2: Accessing Program Application Center

Click “Customer Login” located on the left of your screen in the yellow blue menu box. Here you can view submitted applications, and any outstanding tasks and messages.

Part 3: Managing Tasks and Messages

Any **Tasks or Messages** that SMECO’s HPwES account managers have for you regarding missing or incomplete documents will be sent via the messages section of this program.

1. Any new messages or tasks will appear on the main Welcome screen with reference to the project number in question.
2. Click on the project number to view the notes or tasks.

Part 4: Managing Contacts

While you cannot edit application information for a customer once it is submitted, you can still edit any contact information for your saved contacts.

1. Click on the “Contacts” tab
2. Find your desired contact
   - You can sort your contacts by “Type,” “Title,” or “Contact” by clicking on the respective columns
   - If you have multiple pages of contacts you can skip to another page by clicking on the “Page” numbers in the lower left corner of the screen
3. Click “Edit” in the Action column to edit the information for the customer
4. When you are finished editing the contact, click “Submit”

Part 5: Reviewing an Application

1. Click on the “Applications” tab
2. Click “View” to open the application
3. Here, you will be able to keep track of the statuses of all the applications you have submitted.
   - When you first submit an application, the status will be set to “Application Received.”

- If there are any revisions which need to be made to the application, your account manager will move the status to “Revise Application” and provide you with custom tasks to be completed.
- A status of “Application Processing Complete” will generate an e-mail to the Contractor contact informing you of the contractor incentive to be expected for each customer. IT will also send an email to the customer notifying them of their rebate amount, the timing to expect it, and invite them to participate in an online survey.

4. Within the Manage Application window, you can select several tabs to display information about your specific application.
   - The Messages tab will display any notes concerning your application between you and your account manager.
   - The Application tab will display a copy of the customer’s application.
   - The Rebates tab will display the rebate value associated with your application once the application processing has been completed.

Tips to Avoid Flawed Applications

- Verify that the property owner's name is listed as the Premise Contact.
- Verify that the contract/invoice contains the property owner's name, detail or work and customer's dated signature.
- Verify that the property owner for the Premise Address signed the Rebate Application/Terms and Conditions form and that all fields on the form are complete. If direct install measures were declined or ineligible, the customer must initial the form.
- Carefully verify all information on application before submission as it is not editable. If you do need a portion of the information edited, please contact your account manager via the Messages section of the application.
- Be sure to name your uploaded files according to their content. This will help the managers reviewing your applications find the files as needed.
- Verify that the customer's email address is included in the Premise Contact section.

Contacting Your Account Manager

Please feel free to contact us with any questions.

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