

**Efficiency Maine RFP EM-009-2019  
FOR DELIVERY SERVICES FOR THE  
COMMERCIAL AND INDUSTRIAL (C&I) PRESCRIPTIVE INCENTIVE PROGRAM  
AND THE  
LIGHTING COMPONENT OF THE DISTRIBUTOR INITIATIVES PROGRAM**

*Bidders Informational Webinar*

*February 13, 2019*



# Housekeeping

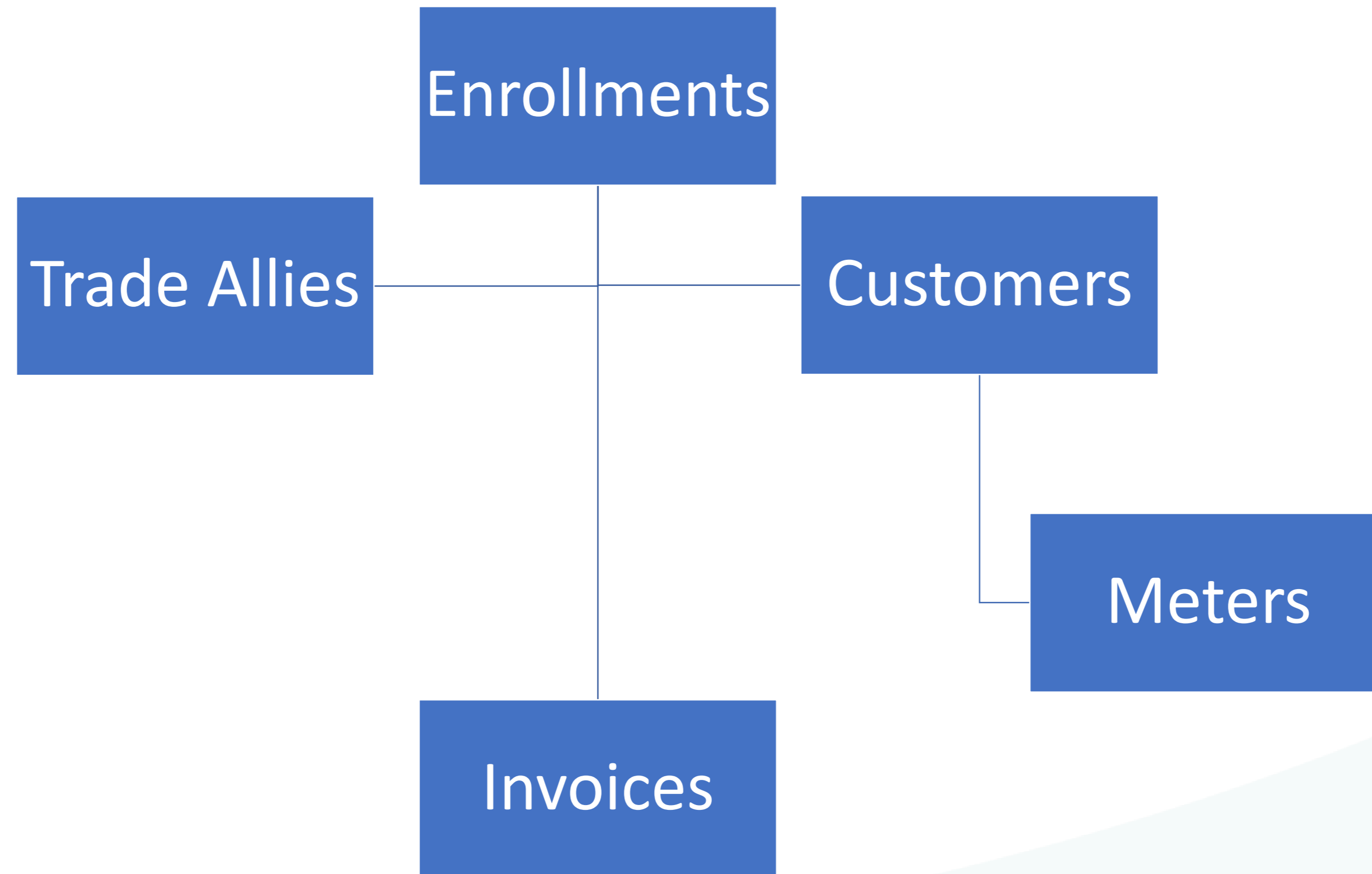
- This is an informational webinar – there will not be an opportunity for Q & A.
- The slides in this webinar will be on the Efficiency Maine website where the RFP EM-009-2019 documents have been posted.  
<https://www.energymaine.com/opportunities/rfp-em-009-2019/>
- All phone lines have been muted to eliminate potential background noise.
- This webinar is not being recorded.

# Efficiency Maine Reporting and Tracking Database (effRT)

Background For Bidder's Conference

- Database for all projects that have been submitted under the Commercial and Industrial Prescriptive Program
- Applications submitted directly by Qualified Partner
  - All non-lighting, non-midstream projects
- Applications uploaded by delivery team
  - Lighting projects, midstream measures
- Automated workflow with email notifications
  - Terms and Conditions Acknowledgment
  - Missing Information, Project Acceptance, Pre-Approval

# effRT Data Tables



# effRT Workflow Steps



# Application Process – Direct Creation in effRT

1. Log in to the effRT 2.0 database
2. Create new enrollment
  1. Follow the steps through the New Enrollment Wizard, enter all required data
  2. Provide customer and project location information
  3. Provide trade ally (Qualified Partner) information
  4. Enter measures
  5. Upload documents
  6. Enter any notes/clarifications
  7. Select “Apply” to save any changes and “Process” to submit the enrollment to the Business Program for review and processing
    1. Once the “Process” button is selected, no changes to the enrollment can be made by the Qualified Partner
3. Terms and Conditions automatically sent to customer for acknowledgment and tax data collection
4. Track projects through personal To Do List
5. Efficiency Maine Program staff will accept, review, and process the enrollment

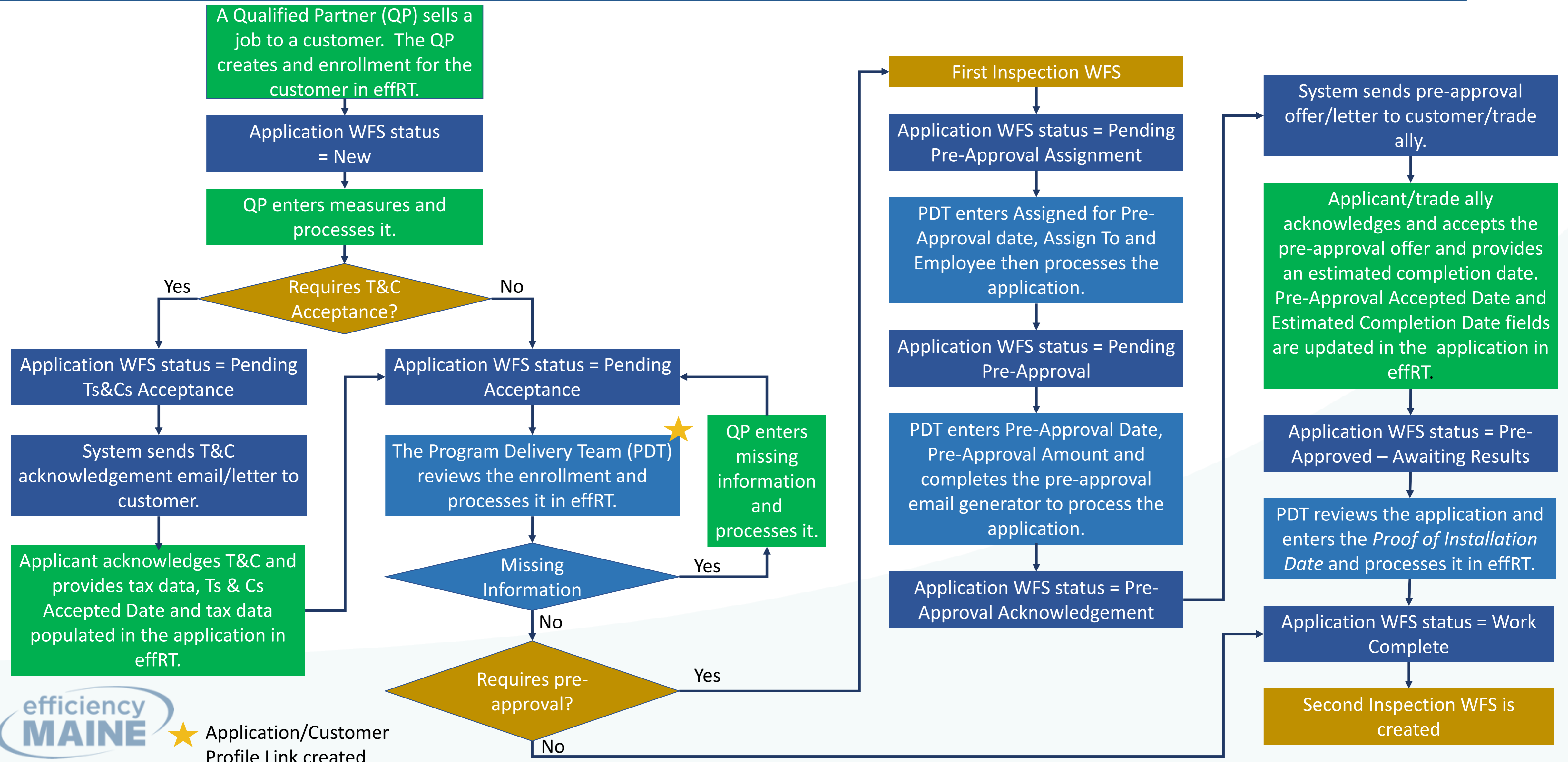
# Enrollment Upload – New Application

- Applicant information and measures uploaded through csv file
- Proper file format automatically generated from CLIC and SLIC tools
- Data validation occurs upon upload, errors will prevent enrollment creation
- Processing begins at Process New Application

# Enrollment Upload – Work Complete

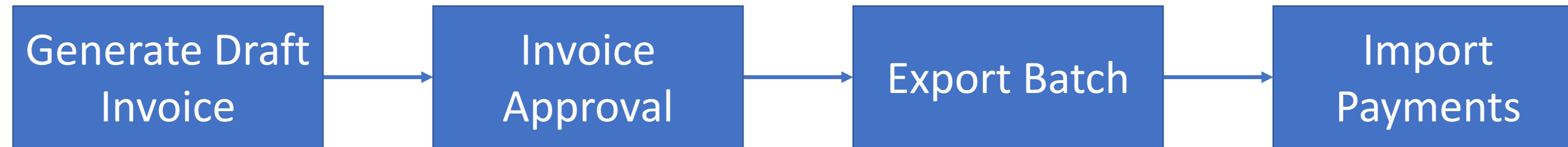
- Applicant information, measures and payment data uploaded through csv file
- Proper file format automatically generated from midstream data collection tools
- Data validation occurs upon upload, errors will prevent enrollment creation
- Workflow completely bypassed, enrollment is created as closed and paid

# effRT Workflow – Application Creation through Inspection



★ Application/Customer Profile Link created

# effRT Invoicing



## Batch Invoice

Full Name	Company Name	Street	City	State	Postal Code	Accounting Code	Application Number	Customer #	Incentive \$	Date	Client Code
Joe Smith	WeRU, Inc	PO Box 123	Portland	ME	04104	72	M723623	CUST0125196	36000	01/25/2019	CIPE
Jane Williams	Awesome Bill's	PO Box 2	Kennebunk	ME	04043	72	M735949	CUST0125196	3950	01/25/2019	CIPE
Jim Bow	Jim Bow	12 Anywhere ST	Presque Isle	ME	04769	72	M761257	CUST0125196	21135	01/25/2019	CIPE
Janice Janes	Jan's Flowers, LLC	1 Someplace RD	Wells	ME	04090	72	M761976	CUST0125196	10390	01/25/2019	CIPE

## Payment File

Check Number	Invoice Number	Check Date	Enrollment Number	Name	Amount Paid
123456	CUST0125196	1/25/2019	723623	WeRU, Inc	36000
123457	CUST0125196	1/25/2019	735949	Awesome Bill's	3950
123458	CUST0125196	1/25/2019	761257	Jim Bow	21135
123459	CUST0125196	1/25/2019	761976	Jan's Flowers, LLC	10390



# Excel Support Tools

- CLIC – Cost-effective Lighting Investment Calculator
  - Used to define retrofit lighting projects
  - Automatically generates effRT upload file
  - Projects uploaded as “New” and processed automatically to next workflow step status
- DSIL Invoice Template
  - Used to collect distributor lighting sales
  - Automatically generates invoice list
  - Collects payment information
  - Automatically generates effRT upload file with payment information
  - Measures uploaded as “Work Complete” – No further processing in effRT

# Distributor Lighting Invoice Template

- Excel based file
- Provides a common format for distributors to record and report midstream measures
- Each transaction is a single entry
- Bulb type and Manufacturer Model # selected from pull down menu
- File pre-configured with program qualifying lamps

Manufacturer/Model #	Watts	Lumens	Hours	Lamp Type	Long Lamp Type	Distributor Cost	Baseline Watts	Rebate	Distributor	effRT Measure C
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- Generates check batch file

Full Name	Company Name	Street	City	State	Postal Code	Accounting Code	Application Number	Customer #	Incentive \$	Date	Client Code
0	0	0	0	0	0	72		0	\$-	0	DSIL

- Generates effRT upload file – “Work Complete” enrollments

# Cost-effective Lighting Investment Calculator (CLIC)

Background For Bidder's Conference

# CLIC

- CLIC is an Excel tool used to scope lighting retrofit projects
- Collects project specific data:
  - Customer and facility information
  - Baseline conditions and scope of the upgrade
- Configured with Technical Reference Manual savings assumptions and formulas
- Configured with material and labor costs for prescriptive projects
- Allows project specific material and labor costs entry for pay for performance projects
- Calculates project specific cost, savings, cost-effectiveness and incentive of each measure
- Presents project financials
- Generates forms: Statement of work, Bill of Materials, Customer Project Acceptance
- Generates effRT upload file

# Live Demonstration