



## Option 1 Custom Project Calculator: ESI Projects

### Data Entry Guidelines for Utilities Submitting ESI Projects

This document provides a summary of the specific data entry requirements for **ESI custom projects** using the IS2.0 Option 1 Custom Project Calculator. Data entry for ESI custom projects differs from that of other sectors in that much, but not all, of the information will be entered by an ESI program partner.

The information below will help guide which fields within the calculator are completed by 1) the ESI program partner, 2) the utility, and 3) BPA. Please use the tables below to confirm which fields the utility is responsible for entering.

**Utilities should complete the following fields on the Proposal tab, when submitting a CPP for an ESI project:**

Cell	Field Name
D6	Proposal Submitter Name
D7	Proposal Submitter Email
D30	Utility-Assigned Project ID
D41	Utility Retail Rate (\$/kWh)
D43	Do you plan to use Large Project Fund (LPF)?
D44	Percentage BPA Reimbursement requested in EEI
D45	Percentage BPA Reimbursement requested in LPF
D47	Expected Total Payment to End User (\$)
D48	Are you requesting Progress Payments?
D52	Third-Party Contract Number (if applicable)
D53	Audit Tracking Number (if applicable)
D54	Container Name (if applicable)
D135-D143	Eligibility Criteria Checklist
D150-D169	Request for Progress Payments (if applicable)

**Utilities should complete the following fields on the Completion Report tab, when submitting a CR for and ESI project.**

Cell	Field Name
D8	Completion Report Submitted by
D9	Was project approved for Large Project Fund?
D28	Percentage BPA Reimbursement requested in EEI
D29	Percentage BPA Reimbursement requested in LPF
D34	Total Payment to End User (\$)
D35	Reimbursement already paid through progress payments (EEI)

The screenshots on the following pages show in detail which calculator fields are to be completed by which of the three parties. **Note** that the color coding used on the following pages is not present in the actual calculator. All input cells are highlighted blue in the actual calculator.



# IS2.0 OPTION 1 CUSTOM PROJECT CALCULATOR

## Data Entry Guidelines for Utilities – Proposal Tab

Project Information		28 Fields still need to be Entered	
	<b>Input or Select Dropdown</b>		<b>Example Entry and Format</b>
Project Name		Required	Comm Center #5 - Pump Improvement
Date Submitted (MM/DD/YYYY)		Required	06/12/2012
Serving Utility		Required	Power Utility Plus
Proposal Submitter Name		Required	Jane Doe
Proposal Submitter Email		Required	john.doe@acmeindustrial.com
Proposal Submitter Phone		Required	425-999-0000
Company Name		Required	ACME Manufacturing
Company Mailing Address		Required	P.O. Box 5000 (Corporate HQ)
Company City		Required	Metro City
Company State		Required	OR
Company ZIP		Required	94596
Facility Street Address		Required	123 Main Street
Facility City		Required	Midville
Facility State		Required	WA
Facility ZIP Code		Required	55555
Building Name(s)		Optional	Comm Center #5
Project Contact Name (employee at Facility)		Required	John Doe
Project Contact Job Title		Required	Maintenance Manager
Project Contact Phone Number		Required	360-800-0000
Project Contact Email		Required	john.doe@acmeindustrial.com
Energy Smart Industrial Partner (ESIP) Name		Optional	John Smith
Project Sector		Required	Industrial
Primary Building Use		Required	Assembly
Secondary Building Use		Optional	Warehouse
Process Type (Industrial Sector Only)			Data Center
Resource Opportunity Type		Required	Yes/No
Federal? (Yes/No)		Required	Yes/No
Utility-Assigned Project ID		Required	333555777
Unique Site ID		Required	112233
Estimated Project Start Date (mm/dd/yyyy)		Required	01/20/2013
Is this project Associated with an Energy Project Manager via the Energy Smart Industrial Program?		Required	Yes/No
Associated Energy Project Manager Name (First Name, Last Name)			Sam Johnson
Technical Service Provider (TSP) Number		Optional	TSP1647
Brief Project Summary (1-3 sentences)		Required	Install dedicated low-flow 10HP recirculation pump (in addition to existing 150HP "Transfer Pump"). Transfer Pump to no longer be used for recirculation purposes.

Legend
Program Partner
Utility
BPA

This is the utility representative submitting the proposal

This is any unique ID assigned by the utility

Estimated (Proposal) Funding and Payment Information		4 Fields still need to be Entered	
	<b>Input or Select Dropdown</b>		<b>Example Entry and Format</b>
Utility Retail Rate (\$/kWh)		Required	\$0.055
Do you plan to use Large Project Fund (LPF)?		Calculated	
Percentage BPA Reimbursement requested in EEI		Required	Yes/No
Percentage BPA Reimbursement requested in LPF		Required	10%
Percentage of Funds Not Requested from BPA			60%
Expected Total Payment to End User (\$)	100.00%	Calculated	
Are you requesting Progress Payments?		NA	\$7,500.00
		Required	Yes/No

The utility should enter all required fields in the estimated Funding and Payment Information Section

**Data Entry Guidelines for Utilities – Proposal Tab (continued)**

Additional Project Information		All Fields Optional				
Third Party Contract Number	<table border="1"> <tr><th>Input or Select Dropdown</th></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>	Input or Select Dropdown				Optional
Input or Select Dropdown						
Audit Tracking Number	Optional					
Container Name	Optional					

Legend
Program Partner
Utility
BPA

Project Description		2 Fields still need to be Entered
Describe the Existing System.	<div style="border: 1px solid black; height: 120px; width: 100%;"></div>	Required
Describe the Proposed System.		Required

The utility should enter all optional fields in the additional project information tab

Energy Savings Estimate/Calculations		1 Fields still need to be Entered
Describe the Energy Savings Estimate / Calculations.	<div style="border: 1px solid black; height: 120px; width: 100%;"></div>	Required

**Data Entry Guidelines for Utilities – Proposal Tab (continued)**

Measurement and Verification (M&V) Plan		2 Fields still need to be Entered
Describe the Measurement and Verification Plan.		
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>		Required
Estimated M&V Completion Date	<input type="text"/>	Required

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Program Partner
Utility
BPA

Estimated Project Costs		1 Fields still need to be Entered
Describe the Estimated Project Costs.		
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>		Required

Eligibility Criteria Checklist		9 Fields still need to be Entered											
<ol style="list-style-type: none"> <li>BPA defined deemed savings and deemed reimbursements are not available for the measures.</li> <li>The proposed measures have not been ordered, purchased or installed.</li> <li>This project does not result in fuel switching.</li> <li>The measures are designed to result in improvements in the efficiency of electricity generation, distribution or use.</li> <li>The expected life of the energy savings for each measure is greater than one year.</li> <li>The proposed baseline for each measure is documented and provides a basis for establishing energy savings.</li> <li>The proposal includes a metering and verification plan showing how energy savings will be verified.</li> <li>The expected project simple payback (Project Cost/Annual Energy Cost Savings) is six months or greater.</li> <li>The expected project benefit/cost ratio meets the current BPA minimum requirement.</li> </ol>	<table border="1"> <thead> <tr> <th>Select from Dropdown</th> </tr> </thead> <tbody> <tr><td><input type="text"/></td></tr> </tbody> </table>	Select from Dropdown	<input type="text"/>	Required Required Required Required Required Required Required Required Required Required									
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Estimated Simple Payback	<input type="text" value="0.00"/>	Calculated											
Estimated B/C Ratio	<input type="text" value="0.00"/>	Calculated											

The utility should enter all required fields in the eligibility criteria checklist

## Data Entry Guidelines for Utilities – Proposal Tab (continued)

Request for Progress Payments	No Entry Required
<p><b>Checklist</b></p> <ol style="list-style-type: none"> <li>1. The time period from the BPA custom project proposal approval date to the completion report submittal date meets or exceeds 12 months</li> <li>2. The amount of each progress payment is \$100,000 or greater</li> <li>3. The estimated incentive for the project is \$250,000 or greater</li> <li>4. The sum of the progress payment does not exceed the lower of (a) 70% of actual expenditures of the project incurred up to the date of the progress payment invoice to BPA or (b) 50% of the estimated total project incentive</li> </ol> <p><b>Summary</b> Provide a summary of the progress payment request, including how many milestones are expected, the total amount of reimbursement, and expected dates of milestones (use language from the Implementation Manual).</p> <div style="border: 1px solid black; height: 150px; width: 100%; background-color: #ffff00;"></div>	<p style="text-align: center;"><b>Select from Dropdown</b></p> <div style="border: 1px solid black; height: 100px; width: 100%; background-color: #ffff00;"></div>

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Program Partner
Utility
BPA

If you are requesting a progress payment, all the information Progress Payment Tab should be filled in by the utility

BPA Approval	BPA Use Only: 5 Fields still need to be Entered																		
<p>COTR Approval Date</p> <p>Approved By (COTR name)</p> <p>Engineering Technical Review provided by</p> <p>Engineering Technical Review Approval Date</p> <p>Assigned BPA Project ID</p> <p><b>Notes</b></p> <div style="border: 1px solid black; height: 150px; width: 100%; background-color: #90ee90;"></div>	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center; border-bottom: 1px solid black;">Input or Select Dropdown</th> <th style="width: 50px;"></th> <th style="text-align: left; border-bottom: 1px solid black;">Example Entry and Format</th> </tr> </thead> <tbody> <tr> <td style="border-bottom: 1px solid black; height: 20px;"></td> <td style="text-align: center;">Required</td> <td><i>06/12/2012</i></td> </tr> <tr> <td style="border-bottom: 1px solid black; height: 20px;"></td> <td style="text-align: center;">Required</td> <td><i>James Smith</i></td> </tr> <tr> <td style="border-bottom: 1px solid black; height: 20px;"></td> <td style="text-align: center;">Required</td> <td><i>Richard Miller</i></td> </tr> <tr> <td style="border-bottom: 1px solid black; height: 20px;"></td> <td style="text-align: center;">Required</td> <td><i>06/12/2012</i></td> </tr> <tr> <td style="border-bottom: 1px solid black; height: 20px;"></td> <td style="text-align: center;">Required</td> <td><i>1R1000102</i></td> </tr> </tbody> </table>	Input or Select Dropdown		Example Entry and Format		Required	<i>06/12/2012</i>		Required	<i>James Smith</i>		Required	<i>Richard Miller</i>		Required	<i>06/12/2012</i>		Required	<i>1R1000102</i>
Input or Select Dropdown		Example Entry and Format																	
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	Required	<i>Richard Miller</i>																	
	Required	<i>06/12/2012</i>																	
	Required	<i>1R1000102</i>																	

## Data Entry Guidelines for Utilities – Completion Report Tab

Custom Project Completion Report		6 Fields still need to be Entered	
	Input or Select Dropdown		Example Entry and Format
Project Name	Enter in Project Proposal	Calculated	
Date Submitted (MM/DD/YYYY)		Required	06/12/2012
Actual Project Start Date		Required	08/09/2010
Date Measure(s) Installed		Required	05/08/1999
M&V Completion Date		Required	08/06/2007
Completion Report Submitted by		Required	John Doe
Was project approved for Large Project Fund?		Required	Yes/No
Company Name	Enter in Project Proposal	Calculated	
Company Mailing Address	Enter in Project Proposal	Calculated	
Company City	Enter in Project Proposal	Calculated	
Company State	Enter in Project Proposal	Calculated	
Company ZIP	Enter in Project Proposal	Calculated	
Project Contact Name (employee at Facility)	Enter in Project Proposal	Calculated	
Project Contact Job Title	Enter in Project Proposal	Calculated	
Project Contact Phone Number	Enter in Project Proposal	Calculated	
Project Contact Email	Enter in Project Proposal	Calculated	
Utility Name	Enter in Project Proposal	Calculated	
Account (BES) Number		Calculated	
BPA Assigned Project ID	Enter in Project Proposal	Calculated	
Project Type/Sector	Enter in Project Proposal	Calculated	

Legend
Program Partner
Utility
BPA

This is the utility representative submitting the completion report

Completion Report Funding Information		1 Fields still need to be Entered	
Total Available BPA Reimbursement (using project cost caps)	\$0.00	Calculated	
Percentage BPA Reimbursement requested from EEI		Required	25%
Percentage BPA Reimbursement requested from LPF			13%
Percentage of Funds Not Requested from BPA	100.00%	Calculated	
Requested BPA Reimbursement - EEI (\$)	\$0.00	Calculated	
Requested BPA Reimbursement - LPF (\$)	\$0.00	Calculated	
Total Payment to End User (\$)		NA	\$10,000.00
Reimbursement already paid through progress payments (EEI)			\$5,000.00
Adjusted BPA Reimbursement - EEI (\$)	\$0.00	Calculated	
Final Requested BPA Reimbursement (EEI + LPF)	\$0.00	Calculated	

The utility should complete all required fields in the Completion Report Funding section

Completion Report Savings Allocation		Section Complete!	
Total Project kWh	0.00	Calculated	
EEI Allocated kWh	0.00	Calculated	
LPF Allocated kWh	0.00	Calculated	
Self-funding Allocated kWh	0.00	Calculated	
Self-funding Allocated kWh %	100.00%	Calculated	

**Data Entry Guidelines for Utilities – Completion Report Tab (continued)**

System Description		2 Fields still need to be Entered
<p><b>Baseline</b>                      This information has been pulled over from the project proposal tab, but you can also overwrite it by simply typing into this box.</p>		
<p>Nothing entered previously, please enter information</p> <div style="border: 1px solid black; height: 100px; background-color: #ADD8E6;"></div>	Required	
<p><b>Post Project</b>                      Include detailed description of completed project including, equipment installed and modifications to the project from the project description in the accepted proposal.</p>		
<div style="border: 1px solid black; height: 100px; background-color: #ADD8E6;"></div>	Required	

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M&V and Energy Savings Calculations		2 Fields still need to be Entered
<p>Were engineering calculations with verification (ECwV) used?</p>	<div style="border: 1px solid black; height: 20px; background-color: #ADD8E6;"></div>	Required
<p>Did the final M&amp;V Plan change from the Custom Project Proposal?</p>	<div style="border: 1px solid black; height: 20px; background-color: #ADD8E6;"></div>	Required
<p><b>Provide a description of changes to M&amp;V Plan or Energy Savings Calculations</b></p> <div style="border: 1px solid black; height: 80px; background-color: #ADD8E6;"></div>		

## Data Entry Guidelines for Utilities – Completion Report Tab (continued)

Project Costs Verification		1 Fields still need to be Entered
Provide summary of total project cost.		
	Required	

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Reimbursement Payment Table			
<p>The reimbursement payment for this project is based on actual project costs and annual verified energy savings resulting from the project. Verification is secured through a mutually agreed upon verification scheme submitted as part of the Proposal. The amount of the incentive payment shall be taken as the lesser of the two quantities given by the following calculation methods:</p> <p>(a) Annual verified Busbar energy savings(kWh/yr) multiplied by the acquisition reimbursement rate/kWh                      (b) 70% of the incremental project cost.</p>			
Item		Proposal	Completion Report
Total Project Savings - Site (kWh)		0.00	0.00
Total Project Savings - Busbar (kWh)		0.00	0.00
Sum of Measure Level Reimbursement		\$0.00	\$0.00
Sum of Project Costs		\$0.00	\$0.00
Project Cost Cap		\$0.00	\$0.00
Maximum BPA Reimbursement		\$0.00	\$0.00
Percentage EEI Funding		0.00%	0.00%
Percentage LPF Funding		0.00%	0.00%
Percentage of Funds Not Requested from BPA		100.00%	100.00%
Payment to End User		\$0.00	\$0.00
Reimbursement already paid through progress payments		\$0.00	\$0.00
Final Requested BPA Reimbursement		\$0.00	\$0.00

BPA Approval		BPA Use Only: 4 Fields still need to be Entered	
CPP Approval Date COTR Completion Report Approval Date Approved By (COTR name) Engineering Technical Review provided by Engineering Technical Review Approval Date	<b>Input or Select Dropdown</b> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Calculated Required Required Required Required	<b>Example Entry and Format</b> <i>06/12/2012</i> <i>07/22/2012</i> <i>Richard Smith</i> <i>Pete Johnson</i> <i>09/23/2012</i>
Notes			