

IS 2.0 Update #3

Schedule for IS 2.0 Transitional Release

BPA is in the final stages of development and testing for our IS 2.0 regional reporting system; we would like to offer our thanks for the patience our customers have shown and the help they have offered in the development of this system. With the release of IS 2.0 you will be able to report the detailed data associated with your BPA and self-funded conservation activities for the first time since EE Central was taken off line.

We realize that in the absence of a reporting system our customers have amassed a significant backlog of information that must be migrated to the new spreadsheets that BPA is introducing. To ensure you do not experience an interruption in cash flow during the time it will take to transfer your detailed information to these new spreadsheets and submit them, BPA will be operating both the current interim invoicing system and IS 2.0 in tandem for a period of several months.

During this transition period we will be using IS 2.0 to collect detailed data associated with your conservation activities, but not using it as our system of payment, rather payment will continue to be made through the current interim invoicing process. This transition period will allow customers sufficient time to enter their backlog of detailed data into the IS 2.0 Reporting Spreadsheets while still having access to EEI funds through the interim invoicing process.

To receive reimbursement on work completed during the transition period, continue to use the interim invoicing process that is currently in place. The detailed data for the summary invoices that occur during the transition period can be submitted via Customer Portal to IS 2.0; you will not need to re-enter this data at a later time. This multi system process it is the only means we have to provide continued access to EEI while the region reconciles the backlog of data.

The following timeline lays out the important milestones in the coming months. We have included a timeline with this communication that lays out these milestones in a quick reference format.

IS 2.0 Release Milestones	
10/1	Draft Deemed Measure Reference list and Custom Project Calculators are distributed for utility testing
10/1 - 10/12	Review draft calculators
November	IS 2.0 goes live; date TBD . Begin submitting your backlog of detailed data.
Launch - 1/19	Transition period <ul style="list-style-type: none"> • Submit backlog of detailed data via Customer Portal to IS 2.0 • Work with your COTR to correct any issues that are discovered during review • Use the interim invoice process to access EEI funds
1/19	Interim invoice process closes
1/19-2/8	BPA financial reconciliation
2/8	Invoicing via IS 2.0 is live. Submit all reporting and invoice packages through Customer Portal to IS 2.0



In broad terms BPA would like to make the following requests during the coming months

- Learn to use the Reporting Spreadsheets once they are finalized and begin populating them with your data. Preparing now will give you a chance to learn the new reporting system spreadsheets, ask questions, and ensure the new process is clear.
- If you have any questions, contact your EER for help so that you are ready to go when IS 2.0 launches.
- During the transition period between the launch of IS 2.0 and 1/19/2013 work in earnest to submit your backlog of detailed data.

Helpful hints:

- After IS 2.0 goes live, please submit your data as early as you can, you don't need to wait until you have completed populating your entire backlog of data in the new IS 2.0 Reporting Spreadsheets. Early submission will allow for in process review and correction should mistakes be discovered.
- During the transition period, you are not limited to one invoice submittal per month.
- During the transition period you will *not* need to organize your submissions of detailed data by monthly invoices. Submit data in manner that is most appropriate to your organization. BPA's preference is for larger submissions if possible.
- Uploads via IS 2.0 must not exceed 500mb. If the files you are submitting exceed a combined 500mb you can upload your files in multiple packages.
- Do not submit any data that you have already submitted to BPA for review (e.g. lighting calculators, custom projects). BPA will input all the data we have received into IS 2.0 on your behalf.
- When using the new IS 2.0 Reporting Spreadsheets please note the required fields and make sure they are completely filled out. This will minimize the need for later correction.
- Ask questions as you go; your EERs are here to help make this process as smooth as possible.
- Make sure your full backlog is submitted by 1/19. Once the current interim process is closed we will not be able to provide any further EEI funds until we have sufficient data to offset the amount of funding provided during the interim process.