

IS 2.0 Update #5

Launch Timeline

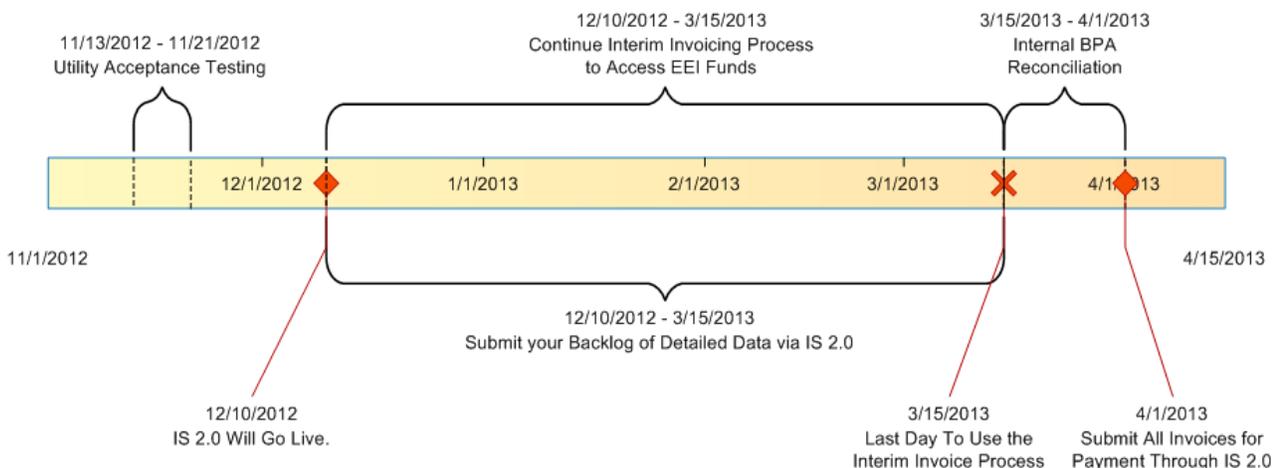
After an extensive development and testing process, IS 2.0 is ready to serve as the regional portal for energy efficiency reporting. Beginning Dec. 10, 2012, IS 2.0 will be available for customers to invoice BPA for EEI funds. The Implementation Manual will be updated on Dec. 10 to reflect the availability of this reporting system.

The following tools will be used for as the means by which you will invoice BPA for EEI funds using IS2.0. A final version of each of these tools will be released by December 6.

- Compressed Air Calculator
- Custom Project Calculator Option 1
- Custom Project Calculator Option 2
- Deemed Measure Upload Template
- Energy Management Calculators (HPEM, Track and Tune, Energy Project Manager)
- Lighting Calculator
- Performance Payment Calculator
- Progress Payment Calculator

After Dec. 10, **when reporting to BPA, please submit these spreadsheets only using IS 2.0 via Customer Portal.** Any of these documents submitted through EEdocs@bpa.gov will be returned to you with a request that they be submitted via IS 2.0. Documents that are in process, such as custom project proposals and completion reports pending approval, should still be submitted via EEdocs@bpa.gov.

In order to ensure timely EEI payments while our customers are submitting their backlog of detailed reporting, BPA will be operating both our current interim invoicing process (IS 1.0) and IS 2.0 in tandem through March 15. During this transition period you will continue to use the current summary invoice process to access EEI funds, but you will use IS 2.0, via the Customer Portal, to submit the detailed reporting data you have accumulated since the beginning of FY 2012. After March 15, you will only be able to report through IS 2.0, which will then generate an invoice. The graphic below provides a visual representation of this timing.



After March 15, BPA will no longer accept IS1.0 summary invoices and will rely solely on detailed data in IS2.0 to generate invoices and payments. Between March 15 and April 1, BPA will undergo an internal reconciliation effort which will temporarily interrupt invoice payments. At that time you will need to have sufficient detailed



data submitted to support the total amount of EEI payments you have received during the current interim invoicing process (IS1.0). If you have not provided sufficient detailed data to support the total payments you received during IS 1.0 by March 15, you will not be able to access additional EEI funds until such time as you have reconciled your total payments. You will not need to match specific invoice submissions by date, savings, or dollar amount. You simply need to submit sufficient detailed data to offset the total dollar amount paid since the summary invoicing process began.

We understand there is a lot going on at this time of the year – year-end closings as well as holiday activities and vacations. Therefore, we know that you may not be able to immediately begin reporting to IS2.0. We have established a 90+ day transition period during which you will have time to organize and submit any backlog of detailed data in the manner that works best for you. Before the March cutover, BPA will be hosting several training opportunities (both in group settings and one on one whenever possible) to ensure all of our customers have the training and resources needed to effectively transition to IS 2.0.

To begin the formal training process for IS 2.0, BPA is hosting online Brown Bag work Sessions from 12:00-1:30 pm. on Dec. 10, Dec. 17, and Jan. 9 to give you a chance for ask questions and learn more about the system. In these Brown Bags, we will focus on how to use IS 2.0 and provide details and “helpful hints” on some of the most common Reporting Spread Sheets (such as the Deemed Measure Upload Template and Custom Project Calculator).

[Live Meeting for December 10](#)
[Brown Bag](#)

[Live Meeting for December 17](#)
[Brown Bag](#)

[Live Meeting for January 9](#)
[Brown Bag](#)

[Add to your Outlook Calendar](#)

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These initial brown bags will be followed by a number of formal and informal training opportunities to be scheduled in the future. Your EER will be contacting you in the coming weeks to ensure you have the training and support necessary to compile your detailed data and submit it via IS 2.0, and your COTR will work with you to establish the best means to submit this data for review.

Should you have any questions or comments regarding the interim invoicing process or the IS2.0 launch, please contact your EER directly; they will serve as the primary point of contact and support during the launch of IS 2.0.