

Updated Process for Indicating Direct Fund Distribution and Entering the Agreement Number in BEETS

Overview

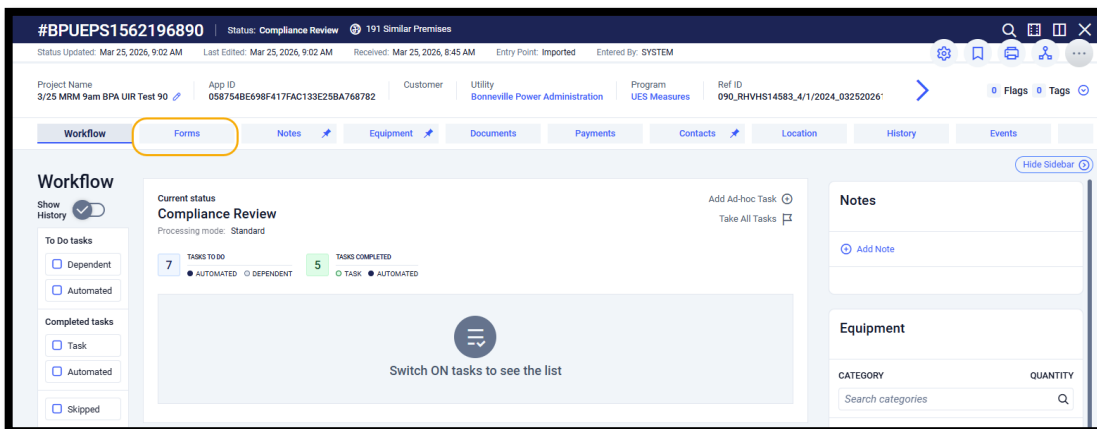
This guide outlines the steps to indicate that a project has received Direct Fund Distribution (DFD) funding and to enter its DFD agreement number in BPA Energy Efficiency Tracking System (BEETS). These fields are located on the funding determination form.

Note: The “Direct Funding” and “DFD Agreement Number” fields must be completed before an application reaches to “Ready to Invoice,” where the application is locked from further edits.

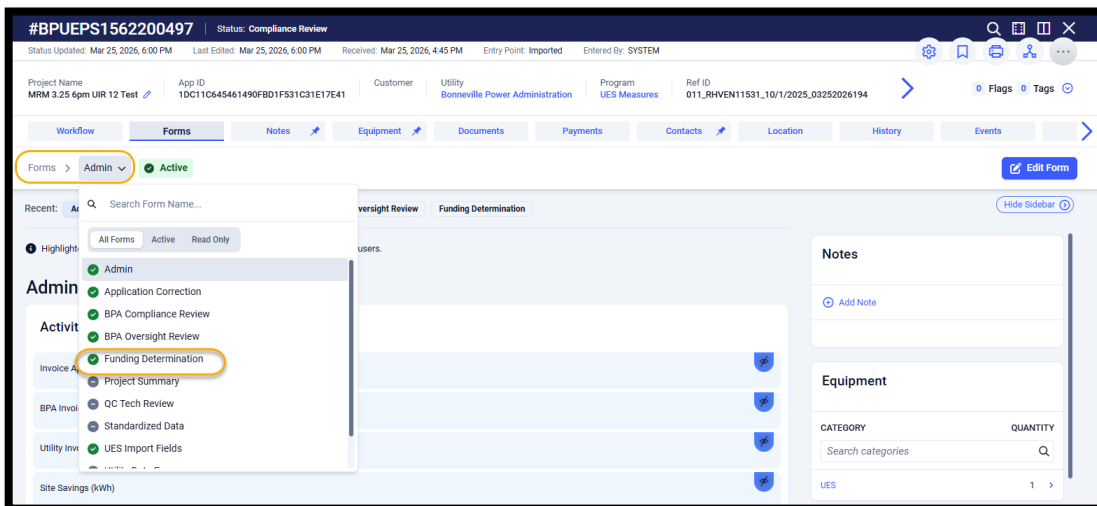
If you encounter any issues with the Direct Funding dropdown or DFD Agreement Number in BEETS, please contact your energy conservation account executive (ECAE).

Step by Step

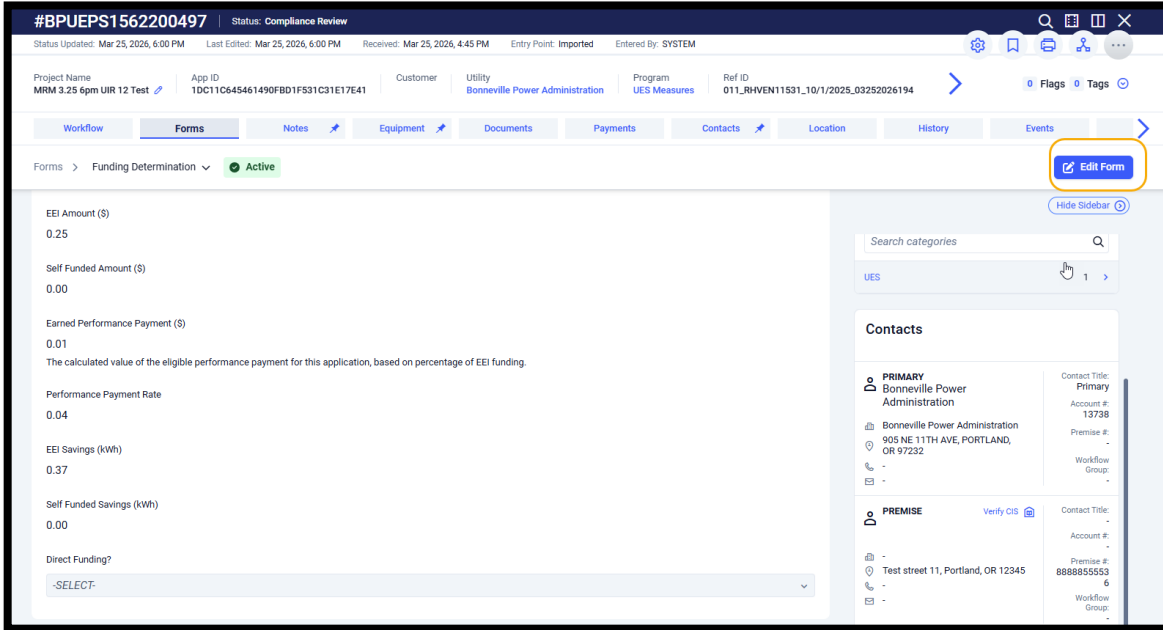
1. Open the application for a DFD-funded project and navigate to the Forms tab.



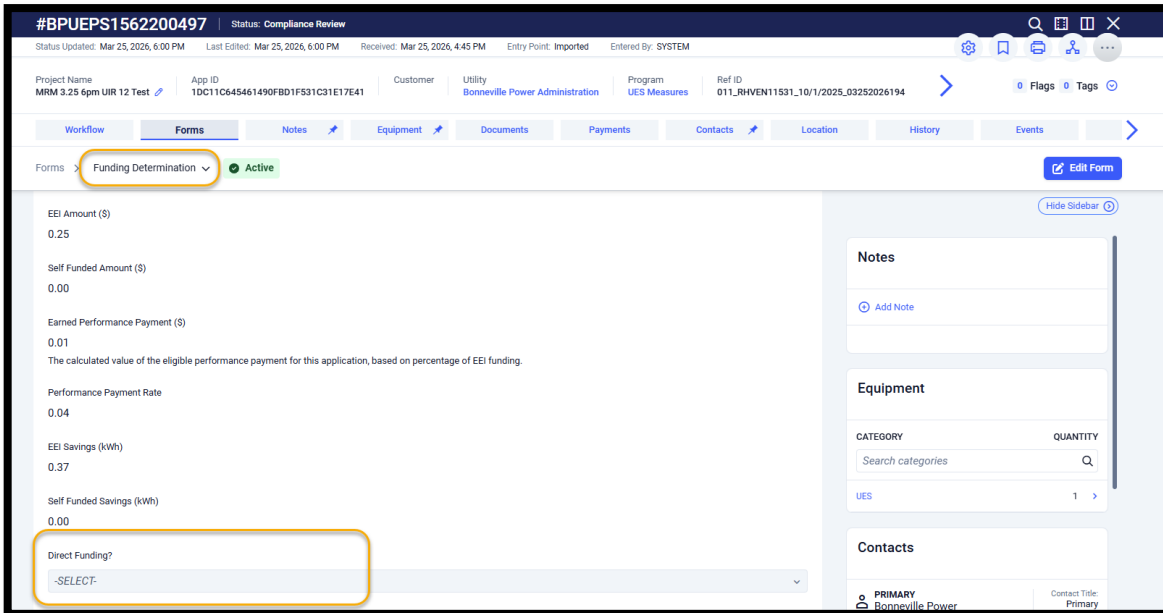
2. On the Forms tab, select the “Funding Determination” form.



3. Click the “Edit Form” button in the top right of the form.



4. Scroll down to the “Direct Funding” field.



5. Select "Yes" in the "Direct Funding" field. The "DFD Agreement Number" field will then appear. Enter the your DFD agreement number and click the "Save" button in the top right corner.

#BPUEPS1562200497 | Status: Compliance Review

Status Updated: Mar 25, 2026, 6:00 PM | Last Edited: Mar 25, 2026, 6:00 PM | Received: Mar 25, 2026, 4:45 PM | Entry Point: Imported | Entered By: SYSTEM

Project Name: MRM 3.25 6pm UIR 12 Test | App ID: 1DC11C645461490FBD1F531C31E17E41 | Customer: Bonneville Power Administration | Utility: Bonneville Power Administration | Program: UES Measures | Ref ID: 011_RHVEN11531_10/1/2025_03252026194

Workflow | **Forms** | Notes | Equipment | Documents | Payments | Contacts | Location | History | Events

Forms > Funding Determination > Active

Cancel and Discard changes | Save | Hide Sidebar

Self Funded Amount (\$) 0.00

Earned Performance Payment (\$) 0.01
The calculated value of the eligible performance payment for this application, based on percentage of EEI funding.

Performance Payment Rate 0.04

EEI Savings (kWh) 0.37

Self Funded Savings (kWh) 0.00

Direct Funding? Yes **A**

DFD Agreement Number * **B**

Search categories

UES 1

Contacts

PRIMARY Bonneville Power Administration
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Bonneville Power Administration
905 NE 11TH AVE, PORTLAND, OR 97232
Premise #: -
Workflow Group: -

PREMISE Verify GIS
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6
Workflow Group: -

