Webinar: BEETS Update & Demo
August 4, 2022
<table>
<thead>
<tr>
<th>Topic</th>
<th>Duration</th>
<th>Presenter(s)</th>
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<tbody>
<tr>
<td>1. BEETS Overview</td>
<td>5 mins</td>
<td>Melissa Podeszwa, BEETS Customer Rep</td>
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<tr>
<td>2. Project Update &amp; Rollout Plan</td>
<td>5 mins</td>
<td>Adam Morse, BEETS Project Lead</td>
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<td>3. Support Resources</td>
<td>5 mins</td>
<td>Jen Mancke, BEETS Change Manager</td>
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<td>4. What’s Changing?</td>
<td>10 mins</td>
<td>Melissa Podeszwa, BEETS Customer Rep</td>
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<td>5. IM Update</td>
<td>5 mins</td>
<td>Corinne Mauck, IM Coordinator</td>
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<td>6. BEETS Demo</td>
<td>30 mins</td>
<td>Adam Morse, BEETS Project Lead</td>
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<td>Mike Palmer, BEETS COTR Rep</td>
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<td>Melissa Podeszwa, BEETS Customer Rep</td>
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<td>7. Q&amp;A</td>
<td>30 mins</td>
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BEETS Overview
Why BEETS?

BPA’s current EE Reporting solution, IS 2.0, must be retired as the technology is no longer supported. Additionally, IS 2.0 lacks data visibility for customers, has limited workflow capability, and requires a significant amount of cross-system integrations that are challenging to manage.

BEETS, the new replacement system, will be released in fall 2022 and will improve BPA’s energy-efficiency invoicing and reporting processes by providing:

- Automated workflows and data verification checks to help expedite processing
- Self-service, on demand reporting for customers
- Visual dashboards with visibility into application progress, budget and payments
- Ability to invoice at utility’s convenience
- Centralized data across application submittal, invoicing, and performance payments

Integrated system allowing visibility into the process from submittal through payment.  
Increased Visibility through Self-Service Reports and Dashboards.  
Expedited Processing through Automated Workflows & In System Approvals.
Project Update & Rollout Plan
# Project Update & Rollout Plan

Currently in Week 5 end-to-end testing, with the Utility Focus Group joining next week. Dashboard development and financial integration work continues, but no show stoppers. **On Track to have all utilities transitioned to BEETS by end of CY’22!**

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<th>Prior</th>
<th>May</th>
<th>Jun</th>
<th>Jul 2022</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
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<td>End to End Testing (6/24 – 8/18)</td>
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<td>Resolve Tickets &amp; Go-Live Prep (6/24 – early Oct)</td>
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<td><strong>Soft Launch</strong>* (Oct ’22)</td>
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<td>Full Launch (Nov ‘22)</td>
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**Training Resources:**
- LIVE: Training Workshops
- Training Guides & Videos
- Go Live Toolkit
- FAQs & Glossary
- Post Launch Open Houses

**TRAINING:**
- Soft Launch Group
- All Utilities

**OPEN HOUSES:**
- All Utilities

*All BPA EE Staff + Utility Focus Group Only*
Customer Support Resources

Who do I go to with questions?

Energy Efficiency Reps (EERS), will serve as your primary contact, but feel free to reach out to any member of the EE Customer Service Team, or email BEETS@BPA.gov to reach the project team directly.

BEETS Resources

- **BEETS Page on BPA.gov**: BEETS info, Project Updates, FAQs (NEW!)
- **BEETS Landing Page (COMING SOON!)**: System Access, Training Session Announcements, Training Materials
- **Live Training Sessions and Demos** will ramp up 4 – 6 weeks ahead of Go Live
What’s Changing?
Key Improvements

Multiple systems comprise an energy efficiency software solution that lacks visibility, automated workflow, and cross-system integration.

From
- Reports must be requested from BPA
- Not able to see budgets in real-time
- Invoice review process happens outside system
- Limited verification checks
- Disconnected documentation submission

To
- Access to self-serve Reporting
- Real-time budget dashboards
- Centralized system driven review & approval process
- Automated verification checks before submission
- Documentation securely stored within project data

Single system to submit, manage, and track our energy efficiency process, from submission to invoicing.
What’s Changing? – EE Reporting Process

**Current**
- Customer compiles and submits invoice package
- BPA performs Compliance Review*
- BPA issues payment

**Future**
- Customer submits application
- BPA performs Compliance Review*
- Customer invoices *NEW*
- BPA issues payment

* Customers always get paid at 30 days
* Customers could get paid in LESS than 30 days

*Oversight performed if applicable
What’s Changing? – Performance Payments

**Current**

Automatic, but not flexible:
- Automatic Payment or Opt Out
- One bucket of funding
- Same Invoice for EEI and Performance Payments

**Future**

More steps, but more flexible:
- Customers control if, when and how much is paid
- Separate EEI & Performance Payment buckets
- Separate invoices for EEI and Performance Payments

Specific Changes

- **Introduction (1):** Minor changes to improve clarity
- **Funding (2):** Rollover = Carryover; Bilateral transfer = Implementation budget transfer; BEETS updates; new allowance for partial self-funding
- **General Requirements (3):** Updated to reflect BEETS invoicing and reporting requirements
- **Custom Projects (4):** Updated to reflect reporting requirements in BEETS; small correction to calculation for incremental new construction costs; changes to Option 2 Custom Projects cost effectiveness requirements

Overall Changes

- Interim reporting requirements pages will be removed throughout the IM
- Many forms going away in favor of limited data collection in BEETS
- Minor corrections/clarifications
- HVAC Updates – DOE labeling
Thank you to our wonderful Utility Focus Group members!

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<tr>
<th>UFG Member</th>
<th>Organization</th>
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<tbody>
<tr>
<td>Eric Miller</td>
<td>Benton REA</td>
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<tr>
<td>Wade Carey</td>
<td>Central Lincoln PUD</td>
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<tr>
<td>Debbie DePetris</td>
<td>Clark PUD</td>
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<tr>
<td>Trevor Frick</td>
<td>Clark PUD</td>
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<tr>
<td>Miranda Boutelle</td>
<td>Central Lincoln/ESG</td>
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<tr>
<td>Tara Maynard</td>
<td>Grays Harbor PUD</td>
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<tr>
<td>Jason Bird</td>
<td>Idaho Falls Power</td>
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<tr>
<td>Wid Ritchie</td>
<td>Idaho Falls Power</td>
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<tr>
<td>Anita Clever</td>
<td>Klickitat PUD</td>
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<tr>
<td>Renee Fiedler</td>
<td>Peninsula Light</td>
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<td>Brandy Neff</td>
<td>PNGC</td>
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<tr>
<td>Anne Larrabee</td>
<td>Tacoma Power</td>
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Also huge thank you to the over 40 BPA employees and contractors who are participating in the BEETS testing phase!
BEETS Demos
BEETS Glossary

- **Application**: Reported measure/project
- **Equipment** = Measure
- **Invoice**: Request for reimbursement (and/or documentation of self-funding); now a separate invoicing step in BEETS
- **Program**: Types of reported measures/projects that share common reporting requirements, calculations, and business rules (i.e. group of UES related measures now encompass the UES program)
- **Workflow**: Sequence of tasks included in the application process from submittal to invoicing where data is passed between users and/or systems.
BEETS Demo

- BEETS Dashboard
- UES Template Changes and Upload
- Revisions Required & Oversight Demo
Questions?