



IS2.0 OPTION 1 CUSTOM PROJECT CALCULATOR

Data Entry Guidelines for Utilities

The purpose of this document is to outline data entry requirements for the new IS2.0 Option 1 Custom Project Calculator. Different 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 Project Information tab, when submitting a Custom Project:

Cell	Field Name
D27	Utility-Assigned Project ID
D33	Utility Retail Rate (\$/kWh)

Utilities should complete the following fields on the Proposal tab, when submitting a Custom Project Proposal:

Cell	Field Name
D3	Date Proposal Submitted
D4	Proposal Submitter Name
D5	Proposal Submitter Email
D6	Proposal Submitter Phone
D10	EEl as a percentage or dollar amounts
D12	Do you plan to use Large Project Fund (LPF)?
D15 – D22	Funding Details, as applicable
D24	Expected Total Payment to End User (\$)
D25	Are you requesting Progress Payments?
D27	Utility End User Payment Rules
D31 – D38	Request for Progress Payments (if applicable)
D55 – D57	Additional Project Information (Optional)
D140 – D145	Eligibility Criteria Checklist, as required

Utilities should complete the following fields on the Completion Report tab, when submitting a Custom Project Completion Report:

Cell	Field Name
D4	Date Submitted
D7	Completion Report Submitted by
D8	Was project approved for Large Project Fund?
D12 – D31	Funding Details, as applicable
D36	Utility End User Payment Rules
D156 – D161	Eligibility Criteria Checklist, as required



IS2.0 OPTION 1 CUSTOM PROJECT CALCULATOR

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.

Data Entry Guidelines for Utilities – Project Information Tab

Legend
Program Partner
Utility
BPA

Project Information		22 Fields still need to be Entered
Are you Submitting a Proposal?	Yes	
	Input or Select Dropdown	Example Entry and Format
Project Name		Comm Center #5 - Pump Improvement
Serving Utility		Power Utility Plus
Company Name		ACME Manufacturing
Company Mailing Address		P.O. Box 5000 (Corporate HQ)
Company City		Metro City
Company State		OR
Company ZIP		94596
Facility Street Address		123 Main Street
Facility City		Midville
Facility State		WA
Facility ZIP Code		55555
Building Name(s)		Comm Center #5
Project Contact Name (employee at Facility)		John Doe
Project Contact Job Title		Maintenance Manager
Project Contact Phone Number		360-800-0000
Project Contact Email		john.doe@acmeindustrial.com
Energy Smart Industrial Partner (ESIP) or Outreach Engineer Name		John Smith
Project Sector		Industrial
Primary Building Use		Assembly
Secondary Building Use		Warehouse
Process Type (Industrial Sector Only)		Data Center
Resource Opportunity Type		Retrofit
Federal? (Yes/No)		Yes/No
Utility-Assigned Project ID		333555777
Unique Site ID		112233
Is this project Associated with an Energy Project Manager via the Energy Smart Industrial Program?		Yes/No
Associated Energy Project Manager Name (First Name, Last Name)		Sam Johnson
Technical Service Provider (TSP) Number		TSP1647
Brief Project Summary (1-3 sentences)		Install dedicated low-flow 10HP recirculation pump (in addition to existing 150HP "Transfer Pump"). Transfer Pump to no longer be used for recirculation purposes.
Utility Retail Rate (\$/kWh)		\$0.055
BPA Use Only		
BPA-Assigned Project ID		

Utility assigns ID – required field

Utility fills in the End User Retail Rate



Data Entry Guidelines for Utilities – Proposal Tab

Legend
Program Partner
Utility
BPA

Proposal Information		5 Fields still need to be Entered	
Date Proposal Submitted (MM/DD/YYYY)	Input or Select Dropdown	Required	Example Entry and Format 06/12/2012
Proposal Submitter Name		Required	Jane Doe
Proposal Submitter Email		Required	john.doe@acmeindustrial.com
Proposal Submitter Phone		Required	425-999-0000
Estimated Project Start Date (mm/dd/yyyy)		Required	01/20/2013

Utility representative is the Proposal Submitter

Estimated (Proposal) Funding and Payment Information		4 Fields still need to be Entered	
Would you like to request EEI as a percentage of total available reimbursement? (if no, request based on dollar amounts)	No		
Do you plan to use Large Project Fund (LPF)?	Input or Select Dropdown	Required	Example Entry and Format Yes/No
If requesting funding based on percentages, complete rows 15-16			
Percentage BPA Reimbursement requested in EEI		NA	10%
Percentage BPA Reimbursement requested in LPF		NA	60%
Percentage of Funds Not Requested from BPA		Calculated	
If requesting funding based on dollar amounts, complete rows 20-21			
Dollar amount BPA Reimbursement Requested in EEI		Required	\$10,000.00
Dollar amount BPA Reimbursement Requested in LPF		NA	\$0.00
Dollar amount of Funds Not Requested from BPA		Calculated	\$5,500.00
Expected Total Payment to End User (\$)		Required	\$7,500.00
Are you requesting Progress Payments?		Required	Yes/No
Utility end user payment rules (for utility use - optional)			\$0.20/kWh, not to exceed 50% of project cost

Utility enters all required funding fields

(Please note that the required fields change, based on the Yes/No question in Cell D10.)



Data Entry Guidelines for Utilities – Proposal Tab (continued)

Legend
Program Partner
Utility
BPA

Request for Progress Payments		No Entry Required				
<p>Checklist</p> <ol style="list-style-type: none"> 1. The time period from the BPA custom project proposal approval date to the completion report submittal date meets or exceeds 12 months 2. The amount of each progress payment is \$100,000 or greater 3. The estimated incentive for the project is \$250,000 or greater 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 	<p>Select from Dropdown</p> <table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>					<p>Funding information required by utility</p>
<p>Summary 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> <table border="1"> <tr><td> </td></tr> </table>						

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

Funding information required by utility

Utility fills in optional fields



Data Entry Guidelines for Utilities – Proposal Tab (continued)

Legend
Program Partner
Utility
BPA

Proposed Project Description	2 Fields still need to be Entered
<p>Describe the Existing System (Baseline). If attaching file, please include full file name and a brief summary.</p> <div style="border: 1px solid black; height: 100px; width: 100%; background-color: #ADD8E6;"></div> <p style="text-align: right;">Required</p>	
<p>Describe the Proposed System. If attaching file, please include full file name and a brief summary.</p> <div style="border: 1px solid black; height: 100px; width: 100%; background-color: #ADD8E6;"></div> <p style="text-align: right;">Required</p>	

Proposed Energy Savings Estimate/Calculations	1 Fields still need to be Entered
<p>Describe the Energy Savings Estimate / Calculations (Including Non-energy benefits and O&M changes if applicable). If attaching file, please include full file name and a brief summary.</p> <div style="border: 1px solid black; height: 100px; width: 100%; background-color: #ADD8E6;"></div> <p style="text-align: right;">Required</p>	



Data Entry Guidelines for Utilities – Proposal Tab (continued)

Legend
Program Partner
Utility
BPA

Proposed Measurement and Verification (M&V) Plan 3 Fields still need to be Entered

Describe the Measurement and Verification Plan. In the description, please include the following information:

- Baseline conditions: current practice or pre condition?
- Pre metering: whole building, affected end use, or none?
- Post metering: whole building, affected end use, or none?
- Model type: engineering, regression, or indexing?

If attaching file, please include full file name and a brief summary.

Required

Select M&V Protocol utilized (click link below to view protocols)

[M&V Protocols: See Custom Project section](#)

Estimated M&V Completion Date

Required

Estimated Project Costs 1 Fields still need to be Entered

Describe the Estimated Project Costs. If attaching file, please include full file name and a brief summary.

Required



Data Entry Guidelines for Utilities – Proposal Tab (continued)

Legend
Program Partner
Utility
BPA

Eligibility Criteria Checklist		2 Fields still need to be Entered
1. This project does not result in fuel switching. 2. The measures are designed to result in improvements in the efficiency of electricity generation, distribution or use. 3. The expected life of the energy savings for each measure is greater than one year. 4. The proposed baseline for each measure is documented and provides a basis for establishing energy savings. 5. The proposal includes a measurement and verification plan showing how energy savings will be verified. 6. The expected project benefit/cost ratio meets the current BPA minimum requirement.	Select from Dropdown <input type="text" value="No"/>	Required
	<input type="text" value=""/>	Required
	<input type="text" value="No"/>	
	<input type="text" value="No"/>	
	<input type="text" value="NA"/>	
	Estimated TRC B/C Ratio at Proposal <input type="text" value="0.00"/>	

Utility enters all required fields

BPA Proposal Approval		All Required Fields Complete!
COTR Approval Date	<input type="text"/>	Calculated 06/12/2012
Approved By (COTR name)	<input type="text"/>	Calculated James Smith
Engineering Technical Review Approval Date	<input type="text"/>	Calculated 06/12/2012
Engineering Technical Review provided by (Engineer name)	<input type="text"/>	Calculated Richard Miller
BPA ESI Technical Review Approval Date	<input type="text"/>	Calculated if project savings >1,000,000 kWh
BPA ESI Technical Review provided by (Engineer name)	<input type="text"/>	Calculated if project savings >1,000,000 kWh
BPA-Assigned Project ID	<input type="text"/>	1R1000102
Notes	<input type="text"/>	



Data Entry Guidelines for Utilities – Proposal Tab (continued)

Legend
Program Partner
Utility
BPA

Review Checklist (for BPA use only)					
Technical Review		Yes	No	Question Comments	Additional Notes
1	Has all necessary technical documentation been provided?			If not, what is missing?	
2	Are project baseline conditions clear and technically accurate?			If not, provide the reasons	
3	Are the descriptions of the measures clear and technically accurate?			If not, provide the reasons	
4	Are the energy savings estimates reasonable and accurate?			If not, provide the reasons	
5	Does Estimated Total (or Incremental) Project Cost appear reasonable and accurate?			If not, provide the reasons	
6	Is the M&V Plan clear and reasonable?			If not, provide the reasons	
7	Does the M&V Plan follow BPA Standard protocols?			If yes, which protocol?	
8	Are the O&M or Non-Electric Energy Benefits clearly defined?			If not, provide the reasons	
9	Do you find the CPP technically acceptable?			Other comments	
10	Does this project require a secondary Quality Control review?			If so, provide the reasons	
Reviewing Engineer's Name <input type="text"/> Date <input type="text"/>					
This section to be completed by the BPA ESI Engineer for INDUSTRIAL PROJECTS over 1MM kWh in savings		Yes	No		Notes
12	Do you agree with the ESI QC recommendation?			If not, provide the reasons	
13	Do you find the CPP technically acceptable?			Other comments	
BPA ESI Engineer's Name <input type="text"/> Date <input type="text"/>					
COMPLIANCE REVIEW - CPP					
Question		Yes	No	Comments	
1	Are the required fields (e.g. BPA Project ID, eligibility criteria, etc.) populated?				
2	In the individual measure descriptions section, are the sector and reimbursement rate correct?				
3	Did the Engineer recommend acceptance?				
4	Do you accept the CPP?				
Reviewing COTR's Name <input type="text"/> Date <input type="text"/>					



Data Entry Guidelines for Utilities – Completion Report Tab

Legend	
Program Partner	
Utility	
BPA	

Custom Project Completion Report 5 Fields still need to be Entered

	Input or Select Dropdown		Example Entry and Format
Project Name	Enter in Project Information	Calculated	
Date Submitted (MM/DD/YYYY)		Required	06/12/2012
Actual Project Start Date		Required	08/09/2010
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
BPA Assigned Project ID		Calculated	

Utility representative is the Submitter

Completion Report Funding Information 1 Fields still need to be Entered

Would you like to request EEI as a percentage of total available reimbursement? (if no, request based on dollar amounts)	Yes		
Total Available BPA Reimbursement (using project cost caps)	\$0.00	Calculated	
If requesting funding based on percentages, complete rows 17-18			
Percentage BPA Reimbursement requested from EEI		Required	25%
Percentage BPA Reimbursement requested from LPF		Required	13%
Percentage of Funds Not Requested from BPA	100.00%	Calculated	
If requesting funding based on dollar amounts, complete rows 22-23			
Requested BPA Reimbursement - EEI (\$)		NA	
Requested BPA Reimbursement - LPF (\$)		NA	
Funds Not Requested from BPA (\$)		Calculated	
Summary of requested reimbursement			
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	
Utility end user payment rules (for utility use - optional)			\$0.20/kWh, not to exceed 50% of project cost

Utility enters all required funding fields

(Please note that the required fields change, based on the Yes/No question in Cell D12.)

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)

Legend
Program Partner
Utility
BPA

Installed Project Description
2 Fields still need to be Entered

Describe the existing system (baseline). If attaching file, please include full file name and a brief summary. This information has been pulled over from the project proposal tab, but you can also overwrite it by simply typing into this box.

Nothing entered previously, please enter information

Required

Describe the installed system. If attaching file, please include full file name and a brief summary. Include detailed description of completed project including, equipment installed and modifications to the project from the project description in the accepted proposal.

Required



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

Legend
Program Partner
Utility
BPA

M&V and Energy Savings Calculations
2 Fields still need to be Entered

Was M&V Plan completed in the Proposal?

Select M&V Protocol utilized (click link below to view protocols) Required

[M&V Protocols: See Custom Project section](#)

Describe the Measurement and Verification Plan. In the description, please include the following information:

- Baseline conditions: current practice or pre condition?
- Pre metering: whole building, affected end use, or none?
- Post metering: whole building, affected end use, or none?
- Model type: engineering, regression, or indexing?
- Energy savings calculations

If attaching file, please include full file name and a brief summary. Required

Describe the changes to the M&V plan if proposal was submitted.



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

Legend
Program Partner
Utility
BPA

Actual Project Costs Verification	1 Fields still need to be Entered
<p>Provide summary of total project cost. Submit details in separate attachment. If attaching files, please include full file name.</p> <div style="border: 1px solid black; height: 100px; width: 100%; background-color: #e0f0ff;"></div> <p style="text-align: right; margin-right: 20px;">Required</p>	

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</p> <p>(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		0.00%	100.00%
Payment to End User		\$0.00	\$0.00
Reimbursement already paid through progress payments		NA	\$0.00
Final Requested BPA Reimbursement		\$0.00	\$0.00



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

Legend
Program Partner
Utility
BPA

Eligibility Criteria Checklist	2 Fields still need to be Entered	
<ol style="list-style-type: none"> This project does not result in fuel switching. The measures are designed to result in improvements in the efficiency of electricity generation, distribution or use. The expected life of the energy savings for each measure is greater than one year. The baseline for each measure is documented and provides a basis for establishing energy savings. The project includes a measurement and verification plan showing how energy savings will be verified. The actual project benefit/cost ratio meets the current BPA minimum requirement. 	Select from Dropdown <input type="text" value="No"/> <input type="text" value="No"/> <input type="text" value="No"/> <input type="text" value="No"/> <input type="text" value="0.00"/>	Required Required
Actual TRC B/C Ratio at completion		

Utility enters all required fields

BPA Completion Report Approval	All Required Fields Complete!	
CPP Approval Date COTR Completion Report Approval Date Approved By (COTR name) Engineering Technical Review Approval Date Engineering Technical Review provided by (Engineer name) BPA ESI Technical Review Approval Date BPA ESI Technical Review provided by (Engineer name)	Input or Select Dropdown <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Example Entry and Format Calculated 06/12/2012 Calculated 07/22/2012 Calculated Richard Smith Calculated 09/23/2012 Calculated Pete Johnson Calculated if project savings >1,000,000 kWh Calculated if project savings >1,000,000 kWh
Notes		



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

Legend
Program Partner
Utility
BPA

Review Checklist (for BPA use only)		All Required Fields Complete!			
Technical Review		Yes	No	Question Comments	Additional Notes
1	Has all necessary technical documentation been provided?			If not, what is missing?	
2	Are project baseline conditions clear and technically accurate?			If not, provide the reasons	
3	Are the descriptions of the measures clear and technically accurate?			If not, provide the reasons	
4	Is the M&V Plan clear and reasonable?			If not, provide the reasons	
5	Does the M&V Plan follow BPA Standard protocols?			If yes, which protocol?	
6	Was the M&V performed in accordance with the approved M&V Plan?			If not, provide the reasons	
7	Are the final verified energy savings accurate?			If not, provide the reasons	
8	Are the O&M or Non-Electric Energy Benefits clearly defined?			If not, provide the reasons	
9	Do you find the CR technically acceptable?			Other comments	
10	Does this project require a secondary Quality Control review?			If so, provide the reasons	
Reviewing Engineer's Name <input style="width: 150px;" type="text"/> Date <input style="width: 150px;" type="text"/>					
This section to be completed by the BPA ESI Engineer for INDUSTRIAL PROJECTS over 1MM kWh in savings		Yes	No		Notes
12	Do you agree with the ESI QC recommendation?			If not, provide the reasons	
13	Do you find the CR technically acceptable?			Other comments	
BPA ESI Engineer's Name <input style="width: 150px;" type="text"/> Date <input style="width: 150px;" type="text"/>					
COMPLIANCE REVIEW - CPP					
Question	Yes	No	Comments		
1	Are the required fields (e.g. BPA Project ID, eligibility criteria, etc.) populated?				
	Is the reimbursement rate correct and does it match the CPP?				
2	Do the invoices and purchase orders support the project cost?				
3	Did the Engineer recommend acceptance?				
4	Do you accept the CR?				
Reviewing COTR's Name <input style="width: 150px;" type="text"/> Date <input style="width: 150px;" type="text"/>					