Detailed Instructions:
Non-Reportable UES Measures & Custom Projects

These instructions are supplemental to the existing instructions for the UES Measure Upload Template and the Option 2 Custom Project Calculator Instructions. For reportable data, please follow the current instructions. If you wish to incorporate non-reportable data into the UES Measure Upload Template or the Non-Reportable Calculator (Option 2), please refer to the instructions below.

UES Measure Upload Template

The following instructions apply to this Excel spreadsheet and are in addition to the existing instructions for the UES Measure Upload Template. It can be used to report UES, BPA QUALIFIED and NON-REPORTABLE measures. In addition, you can use this form to report NEEA direct and indirect savings.

Instructions for Non-Reportable Savings

1. Using the UES Measure List locate the reference number of the measure you will be entering.

2. If the measure is not on the UES Measure List, you can use one of the follow six generic "Reference Numbers" to report your savings:

1. AXX40192	Agricultural
2. CXX20415	Commercial
3. IXX30096	Industrial
4. OXX60001	NEEA Direct Savings
5. OXX60002	NEEA Indirect Savings
6. RXX11903	Residential

3. Enter information into the following required fields:
   a. Funding Source - Select Non-reportable from the drop-down box
   b. Reference Number - Enter the number from the UES Measure List or the generic numbers listed above
   c. Quantity, allows the calculation of total savings based upon the per-unit savings of the measure. For NEEA, enter a value of '1' in this column and the total site savings in Column R, Calculator Savings Per Unit.
   d. Completion Date, the date the non-reportable measure was completed.
   e. Calculator Savings Per Unit, allows the calculation of total savings. Only utilize this field if you are using one of the above listed generic Reference Numbers. Enter Site Savings values in this field. As noted in item 'c' above, enter total NEEA site savings in this column.
   f. OPTIONAL: Calculator Reimbursement Per Unit, allows the calculation of cost per unit for non-reportable measures. Only utilize this field if you are using one of the above listed generic Reference Numbers and you want to calculate a Utility Incentive Cost per Measure on the Activity Report.

4. Save this spreadsheet making sure the file name complies with the File Naming Tool.

5. Submit this spreadsheet along with the other detailed sheets in your monthly invoice package through the Customer Portal.

Option 2 Non-Reportable Calculator

The following instructions apply to this Excel spreadsheet and are in addition to the existing instructions for the Option 2 Custom Project Calculator.

Instruction for Non-Reportable Savings

1. Save this spreadsheet making sure the file name complies with the File Naming Tool convention.
2. All required fields are identified within the calculator as shown below:

Option 2 Required Fields	Required	Required	Required	Required	Required	Required
Non Reportable Required Fields	Optional	Optional	Optional	Optional	Optional	Optional
Project or Measure Level	Project Level	Project Level	Project Level	Project Level	Project Level	Project Level

3. For Option 2 users, please follow the "Option 2 Required Fields" for reportable data to BPA. Non-reportable data may be included by following the "Non-Reportable Required Fields" and instruction #5 below.
4. For Option 1 users, please follow the "Non-Reportable Required Fields" (highlighted in red above) and instruction #5 below.
5. In the Funding and Input Summary Tab, Column C – Non-Reportable to BPA, please select "No." In Column D – Percentage of EEI Funding, please enter "0."

Other Non-Reportable savings types, such as lighting calculators, energy management calculators or compressed air can be reported as either UES or custom, using the processes described above.