Online Application (COLA) Guide

EnergyRight
www.energyright.com/solutions/cola

1 Go to https://pprv.hoeneergyrightsolutions.com/

Use your login credentials to access the Preferred Partners Network (PPN) Dashboard.

2 This is your PPN dashboard.

Here you can find/manage customer proposals, access the PPEC (Preferred Partner Energy Calculator) under "Tools", and the COLA (Online Application) under "Apps". Hover over the Apps tab on the dashboard will expand the drop down to reveal application options and changes.

3 Applications in progress.

Click on "Applications/Projects" (3) to view your company has worked on. If you need to save a project and complete it at a later time click "Save Application".

4 Click on apply for incentives.

This is where you will access the COLA. A new tab should open after you click. **Ensure pop-up blockers are turned off** for this site to allow COLA to open properly.

5 Program rules & guidelines

The first page of the COLA will contain program cover sides and guidelines of the program. Review and accept prior to be able to move forward click "Save Application".

6 Identify if the customer has used our program before.

This is a question which has been added for our internal reporting purposes. Not our program is the point. If you do not see them in the system or if you are unsure they have participated select "NO" as a default. Click next to continue.

7 Identify if the project came from a proposed request.

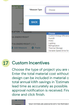
If the customer has been in our system and we have created a proposal in our PPN dashboard, if the proposal came from the dashboard click on one of those proposals select "YES". Select "NO" as a default. Click next to continue.

8 Here you will enter all of your customer's information.

The person's information you put here will be the one to receive all communication. Fill out company information. Company name is key to the application once complete. Click save and continue once finished.

9 Add the site where the work will take place.

Click "Add New Site" to provide information on the site address and who the site contact will be.



10 Fill out site information.

Use the "Same As" boxes if contact and address is the same as the information already given. Our engineers will reach out to this contact in the event of a site inspection. Make sure they have full access to the site if pertinent.

11 Identify facility type & choose closest matching building type.

12 Choose district & local power company (LPC) for your customer.

If directly serving TVA select (3). If in Alabama, KY Kentucky, MS Mississippi, MO Middle TN, NE Northeast TN, SE Southeast TN, WTN West TN. The LPCs will automatically populate based on the zip code you provided in step 10.

13 Your site should show here after you save.

This is what more of a friendly prospects are being done for the same customer. Multiple sites can be added to one customer. Make sure each site has a unique name and don't include any special characters Once you've added all sites click next to continue.

14 Identify what incentive your customer is applying for.

15 Start by clicking add measure.

16 Choose a measure from the drop down.

17 Custom Incentives

If choose the type of incentive you are doing or identify using "Other" if not listed. Fill out the rest of the information. Make sure the units in the "Engineering Note" and design cost be included in material cost. From your energy study let us know the incentive you are applying for. Upload any supporting documents. Make sure the project name is accurately as possible. The customer will get after the project approval notification is received. Finally give a very brief description of work to be done and click Save.

18 Forklift Incentives

The incentive will automatically populate based on the type of forklift project you are applying for (purchased or leased), Let us know number of lifts, total material cost, project lead time, and a brief description of the project. When the form is completed click Save.

19 HVAC Incentives

The incentive will automatically populate based on the type of HVAC project you are applying for (Chiller, Cooling Tower, Air Compressor, Chiller Tune Up), Let us know efficiency, material cost, date of installation (lead before 6/1 days) or leased, and brief description of work. If multiple different unit types and sizes are being installed please use the notes section to let us know. When the form is completed click Save.

20 Lighting Incentives

Please identify the Preferred Partner Energy Calculator (PPEC) SUB number associated with your project. This number can be found in the PPEC next to your project name and in your dashboard under Recent Activity. Make sure the project name is accurate and material cost is accurate. Upload any supporting documents. Make sure the project name and give a brief description of the project. When the form is completed click Save.

21 Refrigeration Incentives

Based on the type of equipment you are installing the incentive will automatically populate (identify quantity, total material cost, estimated kWh/kW contribution, and a brief description of work to be completed. When the form is completed click Save.

22 Thermal Ice Storage Incentives

The incentive will automatically populate (based on full or partial storage, identify ton hours, material cost, estimated days till completion, and give brief project description. When the form is completed click Save.

23 Variable Speed Drive (VSD) Incentives

The incentive will automatically populate (based on the type of VSD you are installing (identify quantity, material cost, estimated kWh/kW contribution, and give a brief project description. When the form is completed click Save.

24 Completed measures will show here.

Once you have completed a measure you can also doing multiple different projects for the same customer. Custom incentives will be done an estimated incentive amount but all other measures will. Once all measures are added click save and continue.

25 Identify if you are ready to send the application to the customer.

If you have a letter of authorization (LOA) let us know and provide it in the document section. Let us know if the customer will be signing the application or if we are signing all of the applications. An LOA will allow us to sign the application on the customer's behalf. Click next to continue.

26 Please upload all project related documents here.

All projects require a scope of work (SOW) and spec sheets for all equipment being installed. For custom projects the scope must include the energy study documents. Make sure the project name is accurate. Upload any supporting documents. Projects that have already been installed will also require invoices to start up processing. Make sure the project name is accurate. Give a very brief description of the document and add a description drop down from the drop down and has to be assigned to at least one site you created. Once all documents are uploaded click next to continue.

27 Please review all application information.

If all information appears correct press next to continue.

28 Finally agree to terms & conditions and submit to your customer.

The PPN and customer will receive an email with an adobe signature request to be completed by the customer. This email will be sent to the contact entered at the beginning of the application. The application will not be reviewed until after it is signed. Make sure the customer has access to the email provided. If customer signs quickly so we can begin the pre-approval stage, then the pop-blocker settings may need to be turned off because will prompt you to continue.

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