



# CenterPoint Energy CSOP Online Portal User Guide

YOLANDA SLADE – PROGRAM MANAGER

FEBRUARY 2020

<b>1</b>	<b>COMMERCIAL &amp; INDUSTRIAL STANDARD OFFER PROGRAM (CSOP) ONLINE</b>	
	<b>PORTAL USER GUIDE.....</b>	<b>2</b>
1.	Introduction .....	2
2.	Creating an Online Portal Account and Log-In Process .....	4
3.	Creating an Online Portal Application .....	7
4.	Viewing and Managing your online portal application .....	18
5.	Contact and Support Information.....	24

# COMMERCIAL & INDUSTRIAL STANDARD OFFER PROGRAM (CSOP) ONLINE PORTAL USER GUIDE

## 1. Introduction

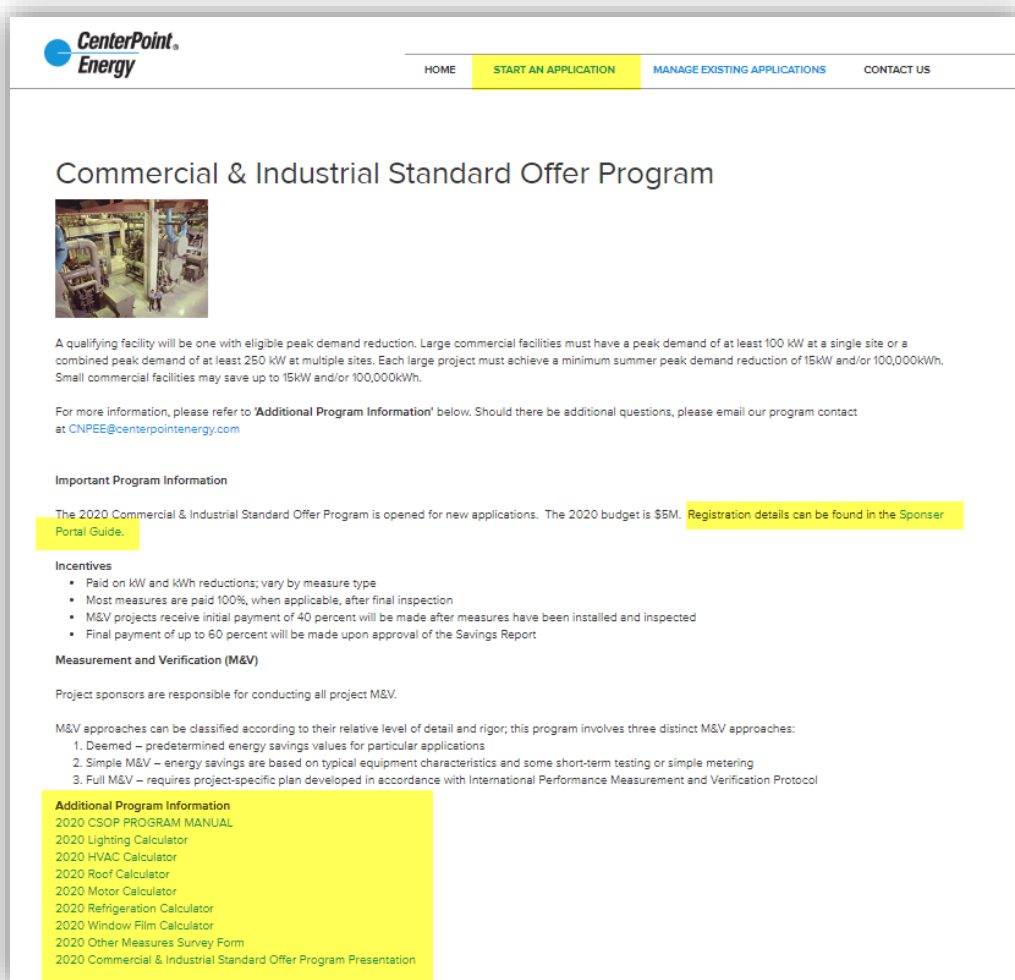
This training guide provides instructions for submitting and managing online portal applications to the Centerpoint Energy Commercial & Industrial Standard Offer Program (CSOP).

The dedicated URL for this program is: [csop.programprocessing.com](https://csop.programprocessing.com).

### IMPORTANT REMINDER:

*Prior to submitting an application to the CSOP, Sponsors (Contractors) must first meet CenterPoint Energy eligibility requirements by completing the CSOP Sponsor Questionnaire form and required document uploads in the CenterPoint Energy Sponsor Management Program in VisionDSM as shown in the screenshots below. Sponsors may complete this process via the dedicated online portal: [CNPsponsor.programprocessing.com](https://CNPsponsor.programprocessing.com).*

The home page of the Commercial & Industrial Standard Offer Program contains important program information and links to additional program documentation. Click [START AN APPLICATION](#) in the menu bar to proceed with the application process.



The screenshot shows the CenterPoint Energy CSOP Online Portal Home Page. The header includes the CenterPoint Energy logo and a navigation bar with links: HOME, START AN APPLICATION (highlighted in yellow), MANAGE EXISTING APPLICATIONS, and CONTACT US. The main content area is titled "Commercial & Industrial Standard Offer Program" and features a small image of a commercial building. Below the title, there is a paragraph explaining the program's requirements for qualifying facilities. A link for more information is provided. The "Important Program Information" section states that the 2020 budget is \$5M and provides a link to the Sponsor Portal Guide. The "Incentives" section lists three bullet points: payment on kW and kWh reductions, 100% payment for most measures, and 40% initial payment for M&V projects. The "Measurement and Verification (M&V)" section explains that project sponsors are responsible for conducting all project M&V and lists three M&V approaches: Deemed, Simple M&V, and Full M&V. The "Additional Program Information" section lists various resources available for download, including the 2020 CSOP Program Manual, Lighting Calculator, HVAC Calculator, Roof Calculator, Motor Calculator, Refrigeration Calculator, Window Film Calculator, Other Measures Survey Form, and the 2020 Commercial & Industrial Standard Offer Program Presentation.

**CenterPoint Energy**

HOME **START AN APPLICATION** MANAGE EXISTING APPLICATIONS CONTACT US

## Commercial & Industrial Standard Offer Program

A qualifying facility will be one with eligible peak demand reduction. Large commercial facilities must have a peak demand of at least 100 kW at a single site or a combined peak demand of at least 250 kW at multiple sites. Each large project must achieve a minimum summer peak demand reduction of 15kW and/or 100,000kWh. Small commercial facilities may save up to 15kW and/or 100,000kWh.

For more information, please refer to 'Additional Program Information' below. Should there be additional questions, please email our program contact at [CNPEE@centerpointenergy.com](mailto:CNPEE@centerpointenergy.com)

### Important Program Information

The 2020 Commercial & Industrial Standard Offer Program is opened for new applications. The 2020 budget is \$5M. [Registration details can be found in the Sponsor Portal Guide.](#)

#### Incentives

- Paid on kW and kWh reductions; vary by measure type
- Most measures are paid 100%, when applicable, after final inspection
- M&V projects receive initial payment of 40 percent will be made after measures have been installed and inspected
- Final payment of up to 60 percent will be made upon approval of the Savings Report

#### Measurement and Verification (M&V)

Project sponsors are responsible for conducting all project M&V.

M&V approaches can be classified according to their relative level of detail and rigor; this program involves three distinct M&V approaches:

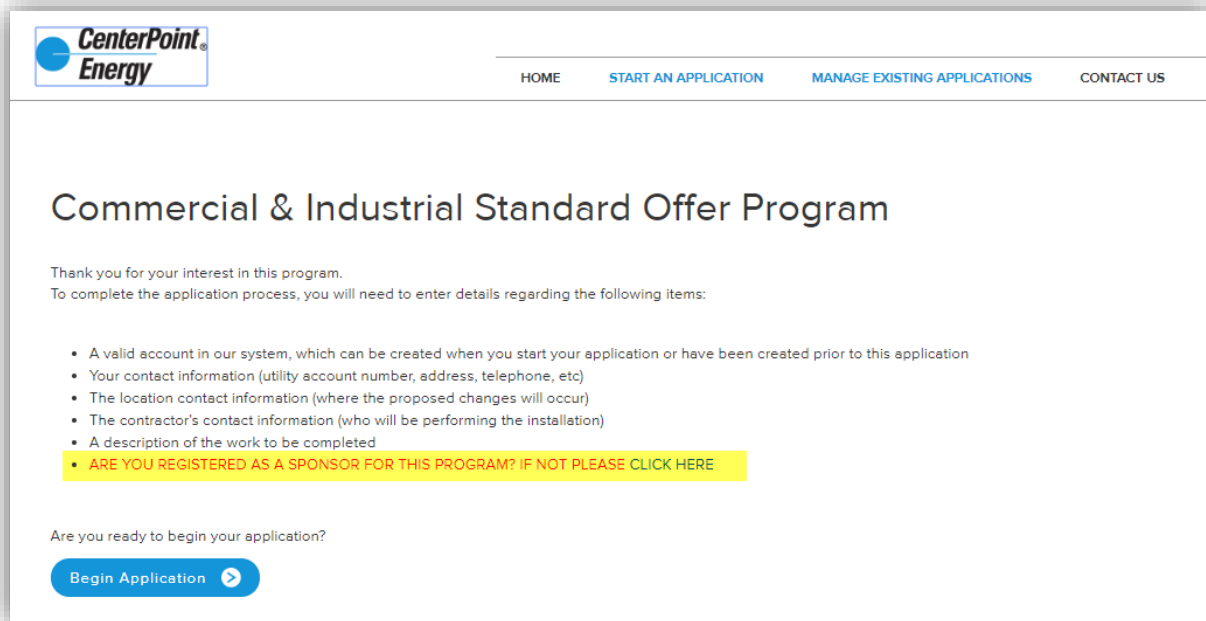
1. Deemed – predetermined energy savings values for particular applications
2. Simple M&V – energy savings are based on typical equipment characteristics and some short-term testing or simple metering
3. Full M&V – requires project-specific plan developed in accordance with International Performance Measurement and Verification Protocol

#### Additional Program Information

- 2020 CSOP PROGRAM MANUAL
- 2020 Lighting Calculator
- 2020 HVAC Calculator
- 2020 Roof Calculator
- 2020 Motor Calculator
- 2020 Refrigeration Calculator
- 2020 Window Film Calculator
- 2020 Other Measures Survey Form
- 2020 Commercial & Industrial Standard Offer Program Presentation

After reviewing the Program Application requirements, click [Begin Application](#) to proceed.

**IMPORTANT NOTE:** Please make sure you have registered to become a Sponsor first to qualify for participation in this and other CenterPoint Energy programs.



The screenshot displays the CenterPoint Energy CSOP Online Portal. The header features the CenterPoint Energy logo on the left and navigation links: HOME, START AN APPLICATION, MANAGE EXISTING APPLICATIONS, and CONTACT US. The main content area is titled 'Commercial & Industrial Standard Offer Program'. Below the title, a message states: 'Thank you for your interest in this program. To complete the application process, you will need to enter details regarding the following items:'. A bulleted list follows, detailing the required information: a valid account, contact information, location details, contractor information, and a description of work. A yellow highlighted link, 'ARE YOU REGISTERED AS A SPONSOR FOR THIS PROGRAM? IF NOT PLEASE CLICK HERE', is positioned below the list. At the bottom, a question 'Are you ready to begin your application?' is followed by a blue 'Begin Application' button with a right-pointing arrow.

**CenterPoint Energy**

HOME   START AN APPLICATION   MANAGE EXISTING APPLICATIONS   CONTACT US

## Commercial & Industrial Standard Offer Program

Thank you for your interest in this program.  
To complete the application process, you will need to enter details regarding the following items:

- A valid account in our system, which can be created when you start your application or have been created prior to this application
- Your contact information (utility account number, address, telephone, etc)
- The location contact information (where the proposed changes will occur)
- The contractor's contact information (who will be performing the installation)
- A description of the work to be completed

[ARE YOU REGISTERED AS A SPONSOR FOR THIS PROGRAM? IF NOT PLEASE CLICK HERE](#)

Are you ready to begin your application?

[Begin Application](#)

## 2. Creating an Online Portal Account and Log-In Process

### For Returning Users:

- Log in with your Account Information

The screenshot shows two sections of the portal. The top section, titled "Returning User? Please Log In:", contains fields for "Email Address:" and "Password:", each with a red asterisk indicating a required field. Below these are input boxes labeled "Enter Email Address" and "Enter Password". A yellow button with a green arrow and the text "Account Login" is positioned below the password field. A link "Forgot your password? Click [HERE](#) to retrieve it" is located at the bottom of this section. The bottom section, titled "New User? Please Create An Account:", features a yellow button with a green arrow and the text "Create Account". A red arrow points from this button down to the "Account Details" form.

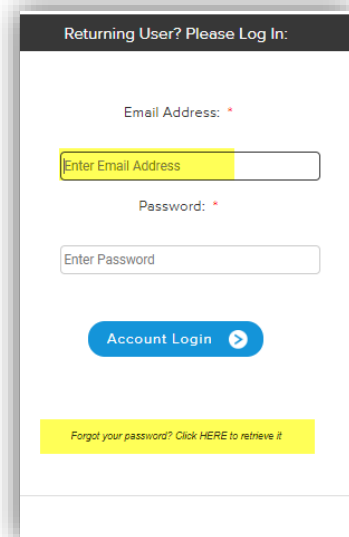
### For NEW Users:

- Select the **CREATE ACCOUNT** option to create a new log-in
- Enter all required fields **marked with a red asterisk\*** and create a Password.
- Click the SUBMIT button
- Then proceed with logging in to the portal

The screenshot shows the "Account Details" form for new users. It contains several required fields, each marked with a red asterisk: "First Name", "Last Name", "Email", "Re-Enter Email", "Utility Account Number", "Password", and "Re-enter Password". Each field has a corresponding input box with placeholder text. At the bottom of the form is a blue button with a white arrow and the text "Submit". A red arrow points from the "Create Account" button in the previous section to the "Email" field in this form.

### How to re-set a FORGOTTEN PASSWORD:

1. Enter your email address assigned to the portal account you created.
2. Click the 'Forgot your Password' link below.
3. Follow the instructions in the [Lost Password Recovery Form](#) as shown below.
4. Don't forget the check mark in the 'I'm not a robot' dialog box.
5. Click SUBMIT.



Returning User? Please Log In:

Email Address: \*

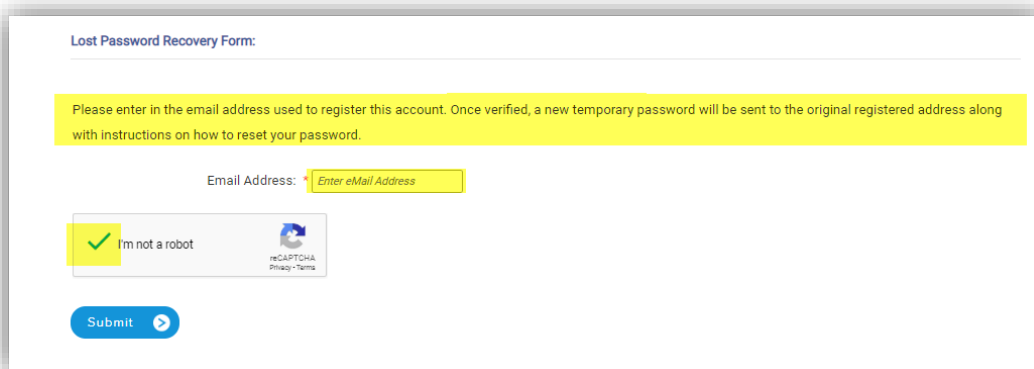
Enter Email Address

Password: \*

Enter Password

Account Login

Forgot your password? Click HERE to retrieve it



Lost Password Recovery Form:

Please enter in the email address used to register this account. Once verified, a new temporary password will be sent to the original registered address along with instructions on how to reset your password.

Email Address: \* Enter eMail Address

I'm not a robot

Submit

6. You will receive a notification from 'donotreply@programprocessing.com' that a temporary password has been emailed to you.


7. Open the email to retrieve your temporary password and click on the link provided: <https://CSOP.PROGRAMPROCESSING.COM> to access your account and CHANGE your password.

8. Select APPLY NOW in the Home portal page and select MANAGE EXISTING APPLCIATIONS as shown:

The screenshot shows the 'Program Application' page with the CenterPoint Energy logo and navigation links: HOME, APPLY NOW, MANAGE EXISTING APPLICATIONS, and CONTACT US. A red arrow points from the 'MANAGE EXISTING APPLICATIONS' link to a login overlay on the right. The overlay is titled 'Returning User? Please Log In:' and contains fields for 'Email Address' and 'Password', both with yellow placeholder text. Below the fields is a blue 'Account Login' button with a right arrow. At the bottom of the overlay is a link: 'Forgot your password? Click HERE to retrieve it'.

9. Once again, enter your account email address and the **TEMPORARY PASSWORD** to continue with your account login. You will now view the Application Contact Entry section.

*To CHANGE your Temporary Password:*

10. Select 'MANAGE APPLICATIONS' in the menu bar to access  **My Account** in the Quick Actions section as shown.
11. Create a new password in the Account Details dialog box, as shown below and click SUBMIT to complete your update.

The screenshot shows the 'Contact Entry' page with the CenterPoint Energy logo and navigation links: HOME, APPLY NOW, MANAGE APPLICATIONS, and CONTACT US. A red arrow points from the 'MANAGE APPLICATIONS' link to the 'My Account' link in the 'Quick Actions' section. The 'Quick Actions' section also includes 'My Applications', 'My Contacts', and 'Log Out'. The 'Manage My Account' dialog box is open, showing the 'Account Details' section. It contains fields for 'First Name' (K), 'Last Name' (Harm), 'Password' (masked with asterisks), and 'Re-enter Password' (masked with asterisks). A green progress bar is shown below the password fields. A 'SUBMIT' button is at the bottom of the dialog box.

### 3. Creating an Online Portal Application

**IMPORTANT PROGRAM NOTE:** Upon successful log-in, please enter **YOUR ESID Number #** in the Account Number field as shown in the sample screen shot below. (Account numbers are not applicable to this program application process).

The screenshot shows the CenterPoint Energy logo in the top left corner. The navigation bar includes links for HOME, START AN APPLICATION, MANAGE EXISTING APPLICATIONS, and CONTACT US. The main heading is "Program Application". Below it, a message says "Thank you for your interest in this program. To complete the application process, you will need to enter details regarding the following items:" followed by a bulleted list of requirements. A yellow callout box highlights two items: "Please enter your ESID number in the account number field below" and "If your site address does not match the ESID address generated after pressing continue, click on the back button on your browser to input the correct ESID". Below this, a prompt says "Please enter the following customer validation information below". A form field for "Your account number (as it is shown on your bill)" contains the text "4444444". A blue "Continue" button with a right arrow is at the bottom.

**CenterPoint Energy**

HOME START AN APPLICATION MANAGE EXISTING APPLICATIONS CONTACT US

## Program Application

Thank you for your interest in this program.  
To complete the application process, you will need to enter details regarding the following items:


- A valid account in our system, which can be created when you start your application or have been created prior to this application
- Your contact information (utility account number, address, telephone, etc)
- The location contact information (where the proposed changes will occur)
- The contractor's contact information (who will be performing the installation)
- A description of the work to be completed
- **Please enter your ESID number in the account number field below**
- **If your site address does not match the ESID address generated after pressing continue, click on the back button on your browser to input the correct ESID**

Please enter the following customer validation information below

Your account number (as it is shown on your bill)

4444444

Continue >

Then select the correct account record as shown in the sample below by clicking the  icon to continue the application process.

This screenshot shows the same "Program Application" page. The navigation bar now includes an "APPLY NOW" link. The list of requirements is shorter. A yellow callout box states: "The following records have been located using the information you provided. Please select the appropriate account record from the list below." Below this, a dropdown menu is open, showing a list of records: "Premiere City", "Missouri City", "Premiere State", "TX", "Premiere Zile", and "77489". A green plus icon is visible in the top right corner of the dropdown menu.

**CenterPoint Energy**

HOME APPLY NOW MANAGE EXISTING APPLICATIONS CONTACT US

## Program Application

Thank you for your interest in this program.  
To complete the application process, you will need to enter details regarding the following items:

- A valid account in our system, which can be created when you start your application or have been created prior to this application
- Your contact information (utility account number, address, telephone, etc)
- The location contact information (where the proposed changes will occur)
- The contractor's contact information (who will be performing the installation)
- A description of the work to be completed

The following records have been located using the information you provided.  
Please select the appropriate account record from the list below.

Premiere City  
Missouri City  
Premiere State  
TX  
Premiere Zile  
77489



The application process will continue with the Project Name section as shown in sample below. Enter a **PROJECT NAME** in the field provided and click 'Continue'.

**NOTE:** This is a **required field** \*and cannot be left blank.

The screenshot shows a form titled "Project Name" with a blue header. Below the header, there is a yellow label "Name this project \*". A text input field contains the text "sample project". At the bottom right of the form is a blue button labeled "Continue" with a right-pointing arrow.

In the Contact Entry section, enter all required and applicable fields available in the **SPONSOR CONTACT Information** section (Name of Sponsor who is person to contact regarding the application). **NOTE:** The First and Last Name fields **OR** the Company field are required.

The screenshot shows a form titled "Contact Entry" with a blue header. Below the header is a section titled "Sponsor Contact Information" with a subtitle "Who is the person we should contact regarding this application?". The form contains several input fields: "First Name: \* First & Last or Company" (with "John" entered), "Last Name: \* First & Last or Company" (with "Smith" entered), "Company: \* First & Last or Company" (with "Company Name" entered), "Address: \*" (with "100 Pine Street" entered), "Address (cont):" (with "Address (continued)" entered), "City: \*" (with "Anytown" entered), "State/Province: \*" (with a dropdown menu showing "OKLAHOMA"), "Postal Code: \*" (with "44444" entered), "Phone: \*" (with "3337776666" entered), and "eMail: \*" (with "test@gmail.com" entered). Below these fields is a checkbox labeled "Save contact for later use in your contact list?" with the text "Yes, save this as a new contact in my profile contact list". At the bottom left is a blue button labeled "Clear Contact" with a right-pointing arrow. At the bottom right are three buttons: "Back" with a left-pointing arrow, "Continue" with a right-pointing arrow, and "Save & Complete Later" with a right-pointing arrow, separated by "- OR -".

Select **CONTINUE** to proceed with the application process.

In the [SITE CONTACT](#) section, enter all required and applicable fields available for the person located at the project site ( please do NOT enter Sponsor information).

**NOTE:** All fields in this section are *required \**.

The screenshot shows the 'Site Contact' form. It has a blue header bar with the text 'Site Contact'. Below the header is a yellow instruction bar that reads: 'Please do not enter Sponsor information here; only end user information for the site where the work will be performed.' The form contains four required fields, each with a yellow label and an asterisk: 'First name \*', 'Email \*', 'Last name \*', and 'Phone \*'. Each label is positioned above its respective text input field. At the bottom of the form, there are three blue buttons: 'Back' with a left arrow, 'Continue' with a right arrow, and 'Save & Complete Later' with a right arrow. These buttons are separated by the text '- OR -'.

Select [CONTINUE](#) to proceed.

In the [SUB-CONTRACOR CONTACT](#) section, please complete fields with all available information, if applicable.

If not applicable, please click [CONTINUE](#).

The screenshot shows the 'Sub-Contractor Contact' form. It has a blue header bar with the text 'Sub-Contractor Contact'. Below the header is a yellow instruction bar that reads: 'If not applicable, please click continue.' The form contains six optional fields, each with a grey label: 'First name', 'Last Name', 'Work Phone', 'Cell Phone', 'Company Name', and 'Email'. Each label is positioned above its respective text input field. At the bottom of the form, there are three blue buttons: 'Back' with a left arrow, 'Continue' with a right arrow, and 'Save & Complete Later' with a right arrow. These buttons are separated by the text '- OR -'.

Complete the **APPLICATION** Section required fields marked with a red asterisk \* as shown below and select CONTINUE to proceed.

In the **Lighting and ACE Measure Workbooks** section, check all applicable workbooks which you have completed and are available for upload.

In the **Document Selection** section, select which documents are completed and available for upload from the list provided.

**NOTE:** This section is **required** \*. If there are NO documents to upload at this time, check the ☐ NONE box in order to proceed with the application process.

**Please Note:**

- In the **DOCUMENT SELECTION** section, the 4 Calculator document uploads are in addition to the Equipment Measures which you will need to select during the application submission process:
  - 2020 Roof Calculator
  - 2020 Motor Calculator
  - 2020 Refrigeration Calculator
  - 2020 Window Film Calculator
- If there are NO documents to upload at this time, check the ☐ NONE box in order to proceed with the application process.

The next page view will display all selected [Document Uploads](#) to be completed as per your selections made in the previous page view. These document uploads will be saved with your project.

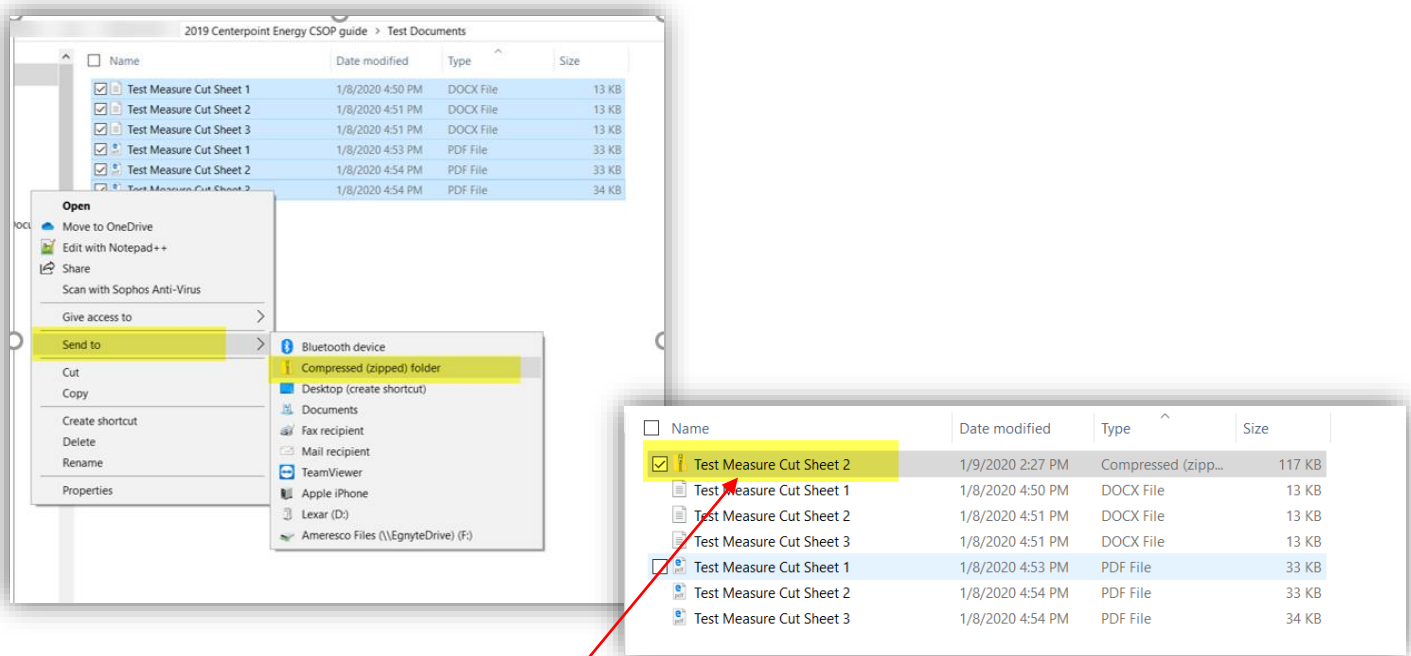
The screenshot shows the 'Document Upload' section of the CenterPoint Energy CSOP Online Portal. The page has a header with the CenterPoint Energy logo and navigation links: HOME, START AN APPLICATION, MANAGE EXISTING APPLICATIONS, and CONTACT US. The main content area is titled 'Document Upload' and contains five document upload cards. Each card has a 'Document Upload' header with a green plus icon and a document name. The cards are: 'MEASURE CUT SHEETS', 'LSF Lighting Workbook', 'ACE Tool Workbook', '2020 Roof Calculator', and '2020 Refrigeration Calculator'. At the bottom of the page, there are three buttons: 'Back', 'Continue', and 'Save & Complete Later', separated by '- OR -'.



**NOTE:** Each Document Upload is designed for a 'single' file upload only.

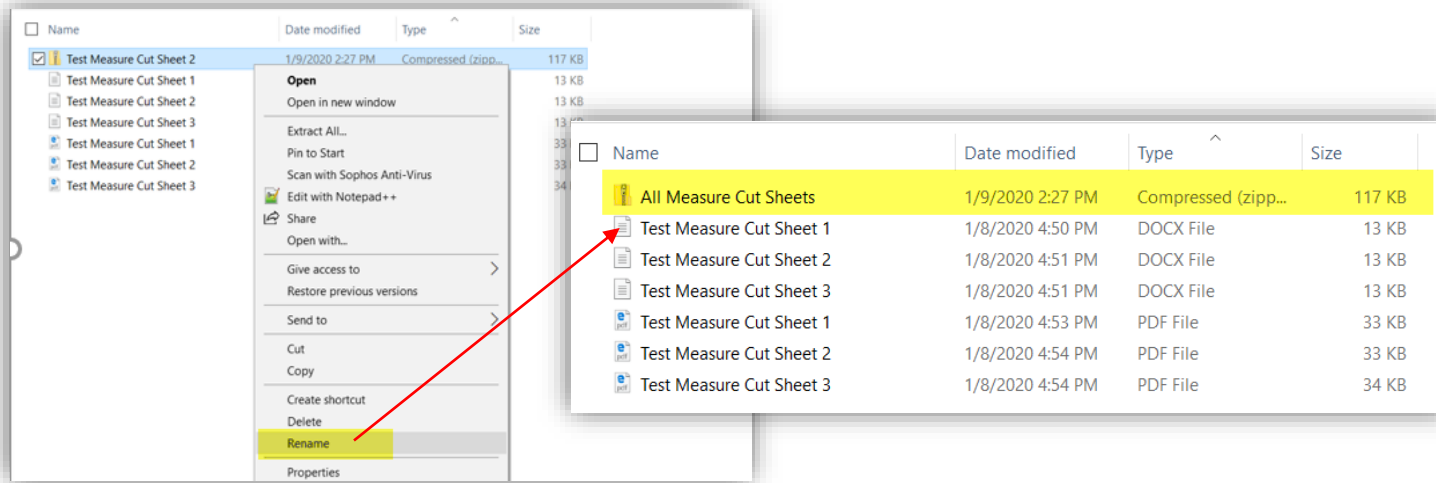
Therefore, for Document Upload selections with multiple files, such as Measure Cut Sheets, we recommend that you combine them in a compressed ZIP file for single upload to your project. Please see sample instructions and screenshots below (page 120 to assist with this process, if applicable).


**How to combine files into a Compressed ZIP file:**

1. Identify the files you wish to combine into a single upload on your laptop or PC.
2. Left click with the mouse the 1<sup>st</sup> document, press the SHIFT key and highlight the last document/ file. ALL files should now be highlighted as shown in screenshot below.
3. RIGHT-click on the highlighted documents and scroll down to 'SEND TO' as shown.
4. Then move the mouse over and highlight COMPRESSED (zipped) FOLDER as shown.

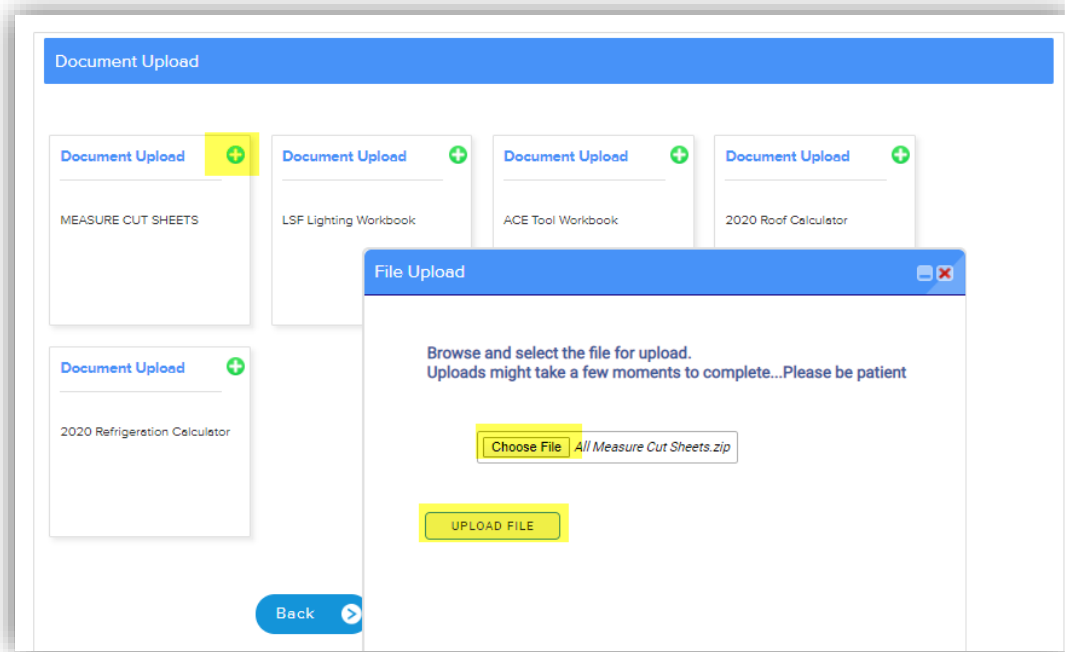


5. Once these steps are completed, a  New Folder will appear at the top which contains all selected files.
6. To view your compressed files, click on the  New folder to open.
7. You can rename your compressed zip file by RIGHT-clicking with the mouse, then scroll down to RENAME. Then simply type in the 'new' file name of your choice, as shown in example below.

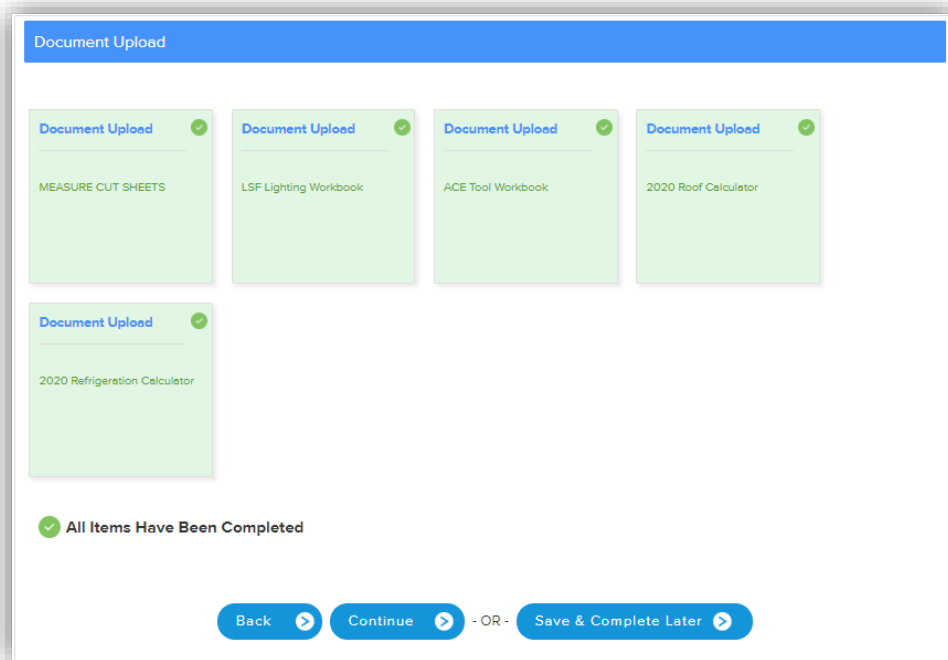


Select the  icon next to each Document Upload as applicable to open the **DOCUMENT UPLOAD** dialog box.


Select the Choose File button and select the file document you wish to upload. Then click UPLOAD FILE to complete.

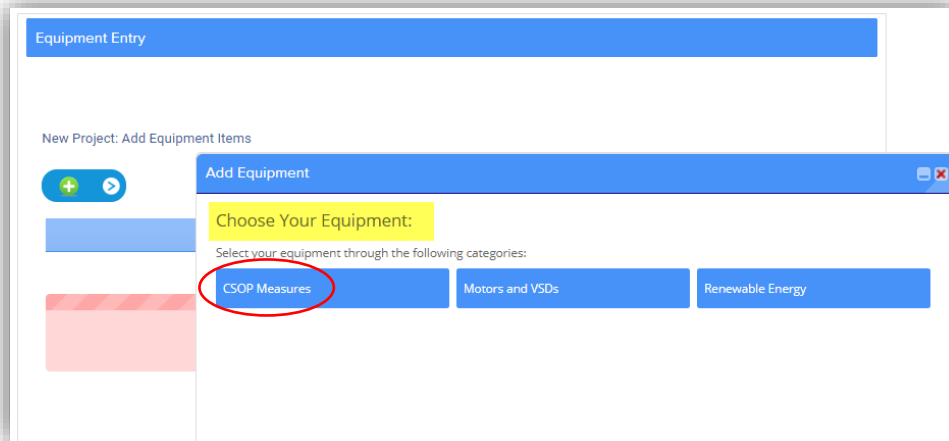


Repeat these steps for ALL Document Uploads displayed as in example above. All documents will display in **green** and a message will indicate when all uploads have been completed.

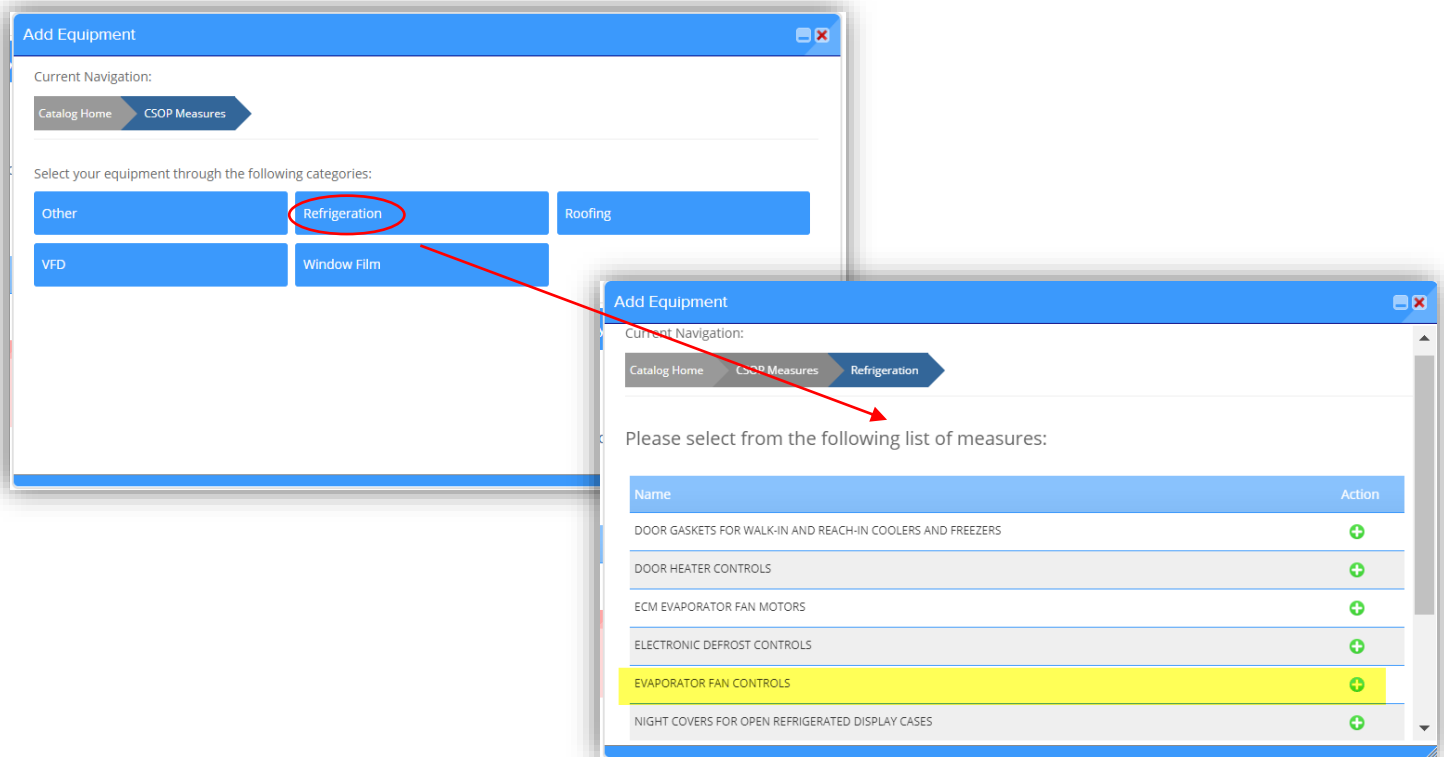


Select the **CONTINUE** button to proceed.

The Equipment Entry section will now display. Click the  icon to open the Add Equipment Dialog box and select the from one of the CATEGORY OPTIONS as shown in the example below.



Then select from one of the sub-Category options as shown below. The list of eligible MEASURES will then be displayed to select from:



Select the desired measure by clicking on the  green plus sign to the right of the measure name.



The ADD EQUIPMENT dialog box will now display. Enter all applicable and **required** \* information in the fields shown and click SUBMIT.

Repeat these steps for ALL Measures to be selected for your program application as needed.

**IMPORTANT REMINDER:** You must select and create your equipment measures in the [ADD EQUIPMENT](#) section if one of the following Calculator uploads was selected in the DOCUMENT UPLOAD section:

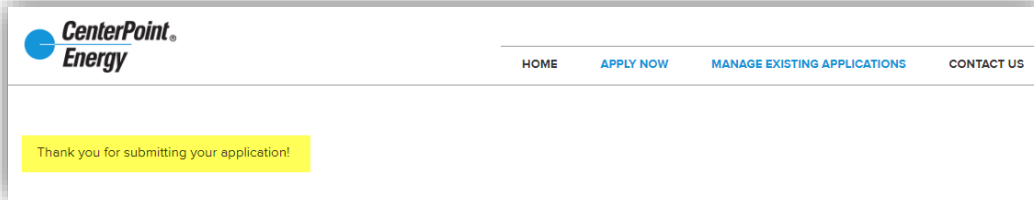
- 2020 Roof Calculator
- 2020 Motor Calculator
- 2020 Refrigeration Calculator
- 2020 Window Film Calculator

Your equipment selections will display as shown and can be edited or deleted, if needed utilizing the pencil or X icon to the right of the displayed equipment.

This completes the application submission process. Click

Complete Application >

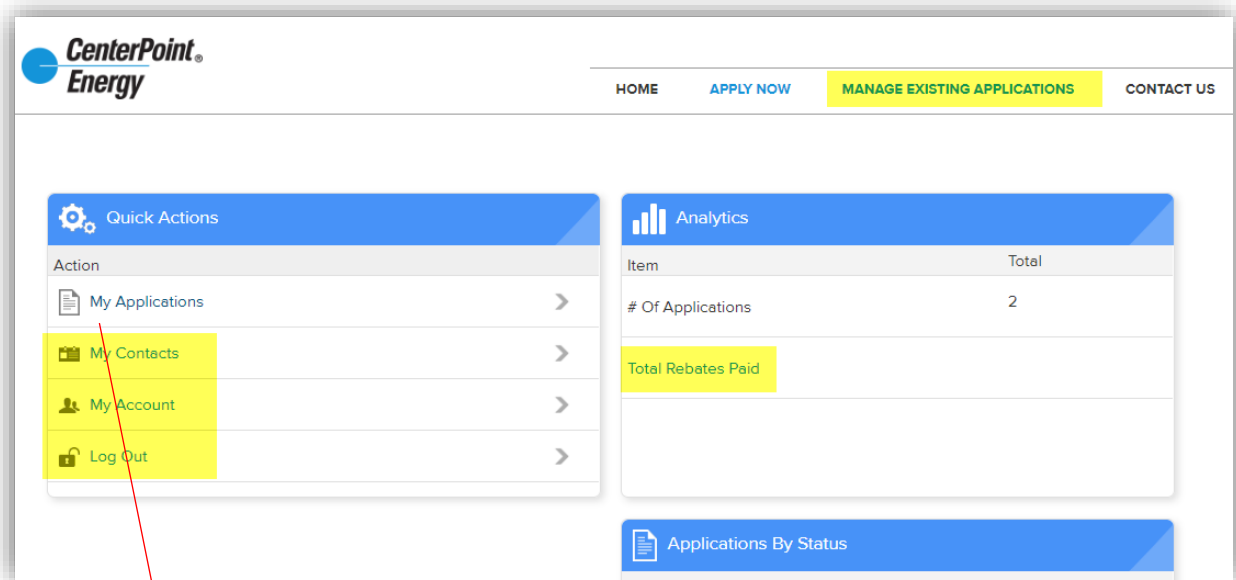
. A message will confirm that your application was successfully submitted in the online portal.



## 4. Viewing and Managing your online portal application

To view and manage your existing CenterPoint Energy portal applications, click the [MANAGE EXISTING APPLICATIONS](#) link in the menu bar.

**NOTE:** To access your application center after log-out, click the [MANAGE APPLICATIONS](#) link in online portal Home Page view as shown on page 2 of this guide. If you have multiple applications in different CenterPoint Energy programs, they will all appear in your application center view.



The QUICK LINKS section is where you can manage your contacts and account details, and where you can log out of the portal. You can also review a summary of Total Rebates Paid in the 'ANALYTICS' section.

Click on [MY APPLICATIONS](#) to display your submitted applications and click 'View' to open a specific application.

Program	Projectname	Contact	Project #	Created	Status	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Search > Reset >
COMMERCIAL AND INDUSTRIAL STANDARD OFFER	GOOSE CREEK	WHITLEY-HARM, KATHLEEN 1809 MARKET ST	CNCSCR1544148035	JAN-8 2020 4:46PM	APPLICATION RECEIVED	<a href="#">[View]</a>
AGENCIES IN ACTION - TARGETED LOW INCOME	HABITAT HOME	SMITH, JOHN 100 PINE STREET	CNTLCR1543918794	JAN-3 2020 3:25PM	APPLICATION RECEIVED	<a href="#">[View]</a>

You will now be able to view your submitted application as shown in the sample below. *(Reminder: This project application is a SAMPLE only and contains no proprietary customer information.)*

**Project #:** CNCSCR1544129866  
**Project Name:** TEST ONLY Goose Creek  
**Program:** CSOP  
**Application Date:** Jan-16 2020 2:52PM

**Project Status:** CLARIFICATION REQUESTED

**Site Contact Information**  
 Where Is The Work Being Completed?  
 William Jones  
 GOOSE CREEK CONSOLIDATED ISD  
 1809 MARKET ST  
 BAYTOWN, TX 77520  
 Phone: (333) 777-6666

**Sub Contractor Contact Information**  
 Who is installing or completing the work/installation?

**Sponsor Contact Information**  
 Who is the person we should contact regarding this application?

**Messages**  
 Below are messages sent between you and the program administrator.  
[Send Us A Message](#)

**Current Tasks**  
 Below are outstanding tasks you currently need to complete. Click on the icon to the right of each task to perform the required activity.

- Document Upload: **UPLOAD REVISED LSF WORKBOOK**  
 Assigned to: Customer  
 Created: 1/16/2020 2:54:48 PM
- Document Upload: **UPLOAD REVISED ACE WORKBOOK**  
 Assigned to: Customer  
 Created: 1/16/2020 2:54:48 PM
- Document Upload: **UPLOAD OTHER OR MISSING DOCS**  
 Assigned to: Customer  
 Created: 1/16/2020 2:54:48 PM
- Complete Task: **Confirm Clarification Request Completed**  
 Assigned to: Customer  
 Created: 1/16/2020 2:54:48 PM

**Forms**  
 Below is a list of all of the forms you've filled out for this project. Click on a form below to view its details.

- APPLICATION  
 \* THIS FORM IS EDITABLE
- PROJECT SAVINGS AND INCENTIVE SUMMARY
- SITE CONTACT  
 \* THIS FORM IS EDITABLE

**Documents & Files**  
 Below is a list of all of the documents and files that have been created for this project, including letters and emails. Click on an item below to view its details.

**Documents**

- Application Received Receipt  
 Created: 1/16/2020 2:53:58 PM
- CLARIFICATION EMAIL  
 Created: 1/16/2020 2:51:08 PM
- CLARIFICATION EMAIL  
 Created: 1/16/2020 2:53:08 PM

**Files**

- TEST.Docx  
 Uploaded: 1/16/2020 2:50:48 PM
- TEST.Docx  
 Uploaded: 1/16/2020 2:51:08 PM
- TEST.Docx  
 Uploaded: 1/16/2020 2:51:08 PM
- TEST.Docx  
 Uploaded: 1/16/2020 2:51:43 PM
- TEST.Docx  
 Uploaded: 1/16/2020 2:51:53 PM
- TEST.Docx  
 Uploaded: 1/16/2020 2:52:02 PM
- TEST.Docx  
 Uploaded: 1/16/2020 2:52:10 PM

**Equipment**

You can send or receive MESSAGES via the online portal with the program administrator.

The following sections will contain information related to your project application, as applicable:

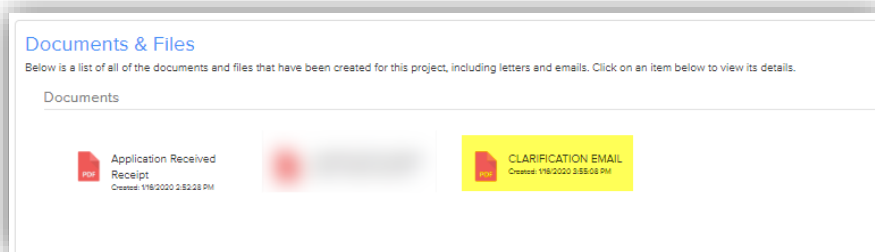
- [Current Tasks \(to complete\)](#)
- [Forms \(submitted\)](#)
- [Documents & Files \(including emails and letters sent\)](#)

### Important Project Management Instructions for Sponsors

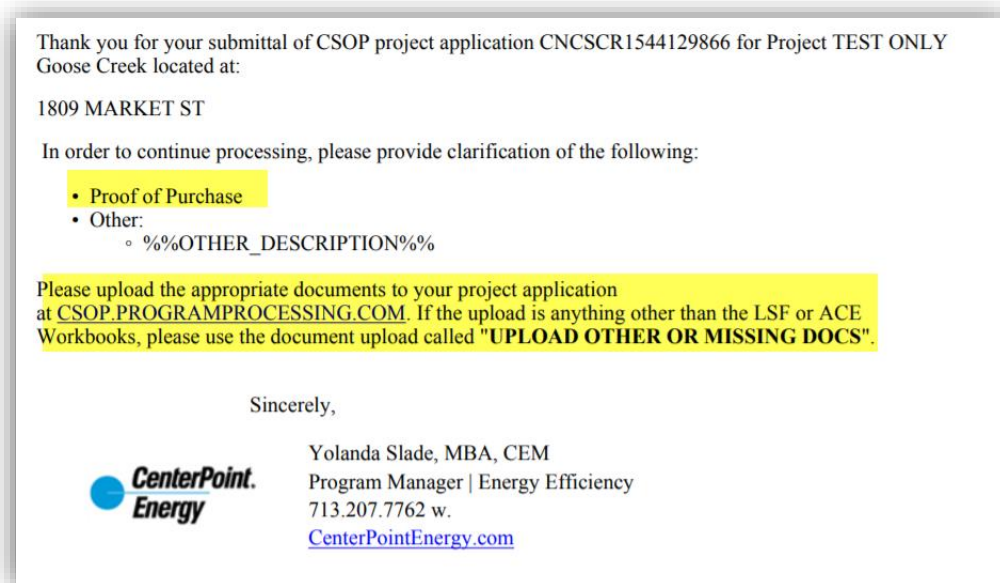
In this program, Sponsors can expect to receive Emails at various milestones during the application review process. These emails will contain important instructions for a variety of requests, including additional documentation needed, tasks or document uploads to perform.

While this Guide does not include screenshots of every potential email or task you may receive during your specific application approval process, we have provided an example below to help you understand how to navigate and perform requested tasks and uploads for this program. Please carefully read and follow the instructions in all email correspondence you receive during your application review process.

In this sample project, you will see that the Centerpoint Energy team has sent a 'CLARIFICATION EMAIL' which is visible in the Sponsor's "Documents & Files" section. The email is requesting additional clarification from the Sponsor, specifically a 'Proof of Purchase' documentation.

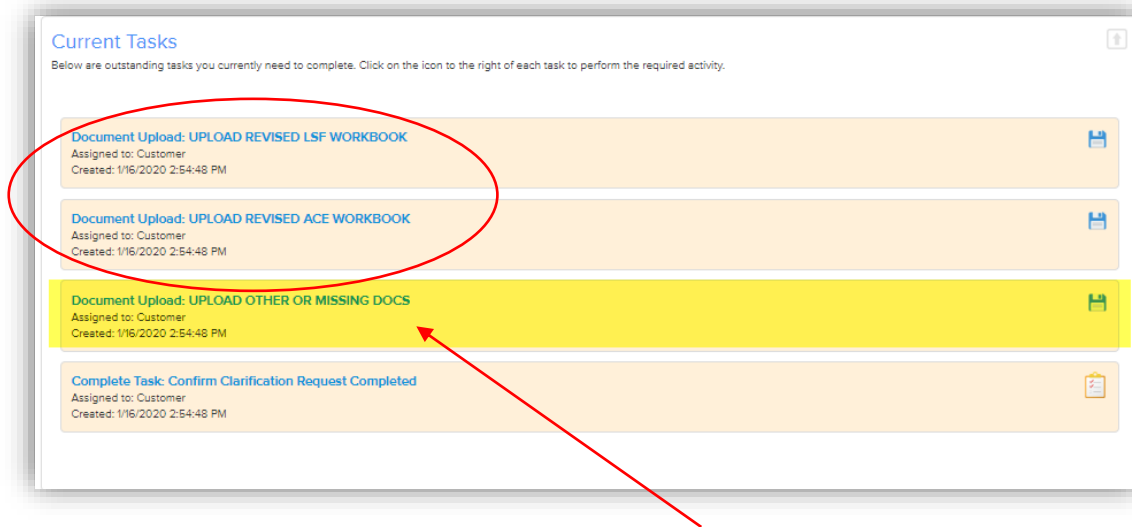


Click on the link to the email to open it and read the instructions. In this example, the Sponsor will need to upload the Proof of Purchase via a TASK called: [Document Upload: UPLOAD OTHER OR MISSING DOCS](#).




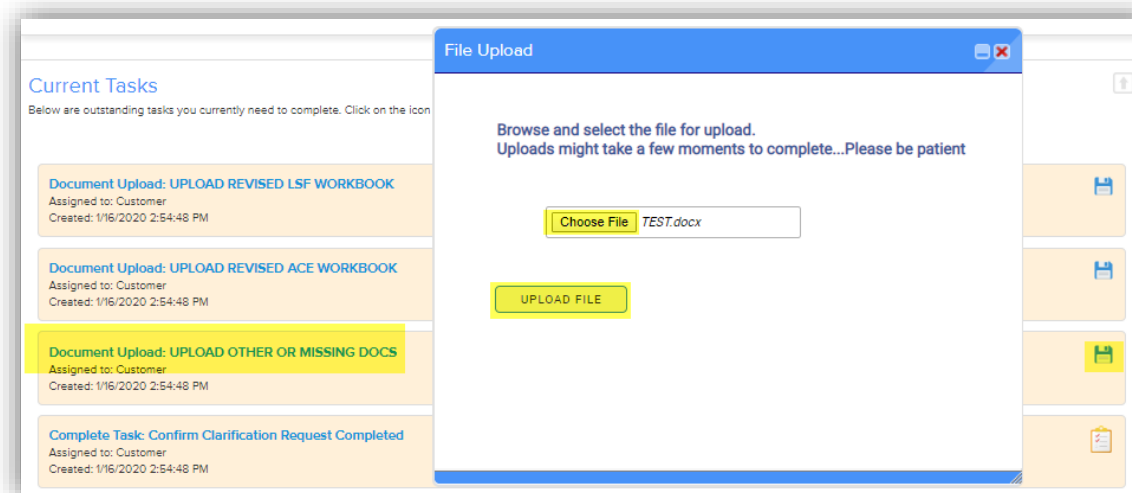
Navigate to the [Current Tasks](#) section of your application page view and identify the correct Document Upload task to perform, as shown on the next page.

**Important Note:** If you are uploading a revised LSF or ACE Workbook, please use one of the first 2 Document Uploads as shown.



If you are uploading anything other than a Workbook, please use the 3<sup>rd</sup> Document Upload link as highlighted in yellow above. ( It is not necessary to complete all Document Uploads listed unless they specifically apply to your project).

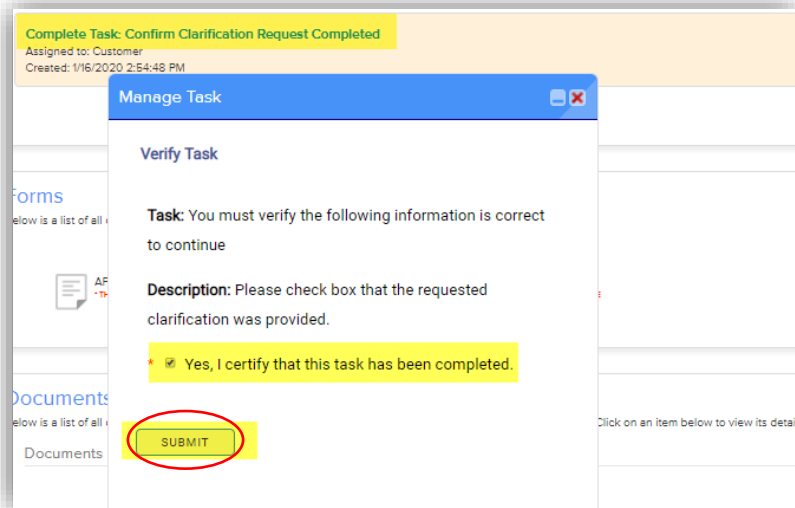
Click the  icon to open the File Upload box as shown. Choose the appropriate file from your laptop or computer directory, then click **UPLOAD FILE** to attach to your project application.



The file will now be visible with your other file attachments in the [FILES](#) section.

Select the **COMPLETE TASK: Confirm Clarification Request Completed** next as shown below. The Manage Task box will display.

Click ☒ **Yes, I certify that this task has been completed.** with a checkmark to certify you have completed the Document Upload(s) requested above.



Complete Task: Confirm Clarification Request Completed  
Assigned to: Customer  
Created: 1/16/2020 2:54:48 PM

Manage Task

Verify Task

**Task:** You must verify the following information is correct to continue

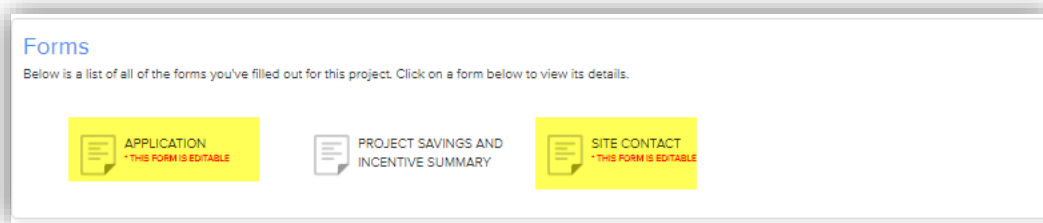
**Description:** Please check box that the requested clarification was provided.

☒ Yes, I certify that this task has been completed.

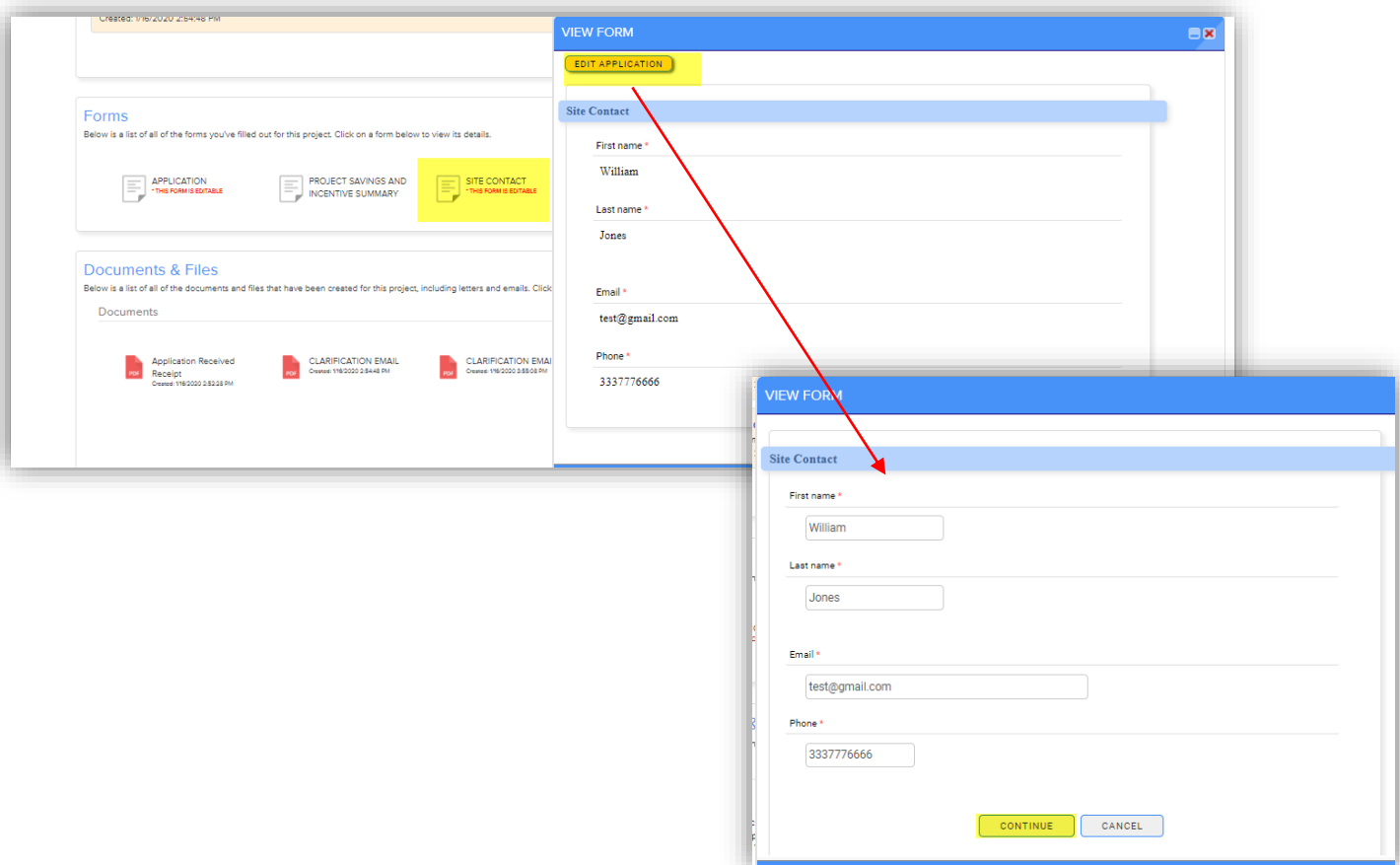
SUBMIT

Click the SUBMIT button and this task and any other document uploads which did NOT apply to your project will now no longer be visible in your application page view.

You may also view and EDIT your project application and Site Contact information if needed via the application management center of this online portal.



In the **FORMS** section, open either the APPLICATION or SITE CONTACT links to view the form.



If changes are made, click CONTINUE to save your changes to the form in the portal. If no changes are required, simply click 'CANCEL' to return to your application center page view.



## 5. Contact and Support Information

For information regarding the Commercial Standard Offer Program (CSOP) and all program related questions, please contact:

Yolanda Slade – Program Manager

[Yolanda.slade@centerpointenergy.com](mailto:Yolanda.slade@centerpointenergy.com)

---

For questions regarding the CSOP Online Portal User Guide, please contact:

Sunil Tewarson – Senior Business Analyst

[Stewarson@appliedenergygroup.com](mailto:Stewarson@appliedenergygroup.com)

Mike Kearns – Principal Business Analyst

[mkearns@appliedenergygroup.com](mailto:mkearns@appliedenergygroup.com)