

JCPL Prescriptive Lighting Project Workbook Instructions & Helpful Hints

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Version History

Version 1	9/19/23	Initial Launch Author Stacey Genne

JCPL Prescriptive Lighting Project Workbook Instructions

Introducing the new JCPL Lighting Workbook for Lighting Projects under the Prescriptive/Custom Program for submission of the Online Application by Approved Program Allies and Customers.

This document will provide you step by step instructions on how to process a Lighting Project using the Lighting Workbook and submitting the Online Application [OLA]. Review the table of contents in the previous page to pinpoint exactly the area you need assistance in.

By clicking on the table of contents using the CTRL key you can link directly to the area you need information in. If you do not find what you are looking for contact the Program Team.

You, the applicant will be required to download the workbook from a specific area on the JCPL Energy Saving website to fill out the details and then add it to the application as you submit for your incentive request.

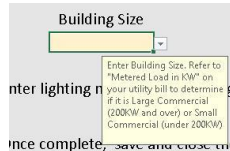
You are encouraged to download the workbook prior to filling out the application online so that you are ready with the details needed to submit the application.

Let us get started with some best practices! The document will be broken into sections that you can go to directly from the table of contents as needed.

Best Practices and Helpful Hints

- Always download a new version of the Lighting Workbook from the JCPL site before beginning a new project application submission. This will ensure the latest updates are being utilized.
Link -
- Always save the workbook as you begin to add the details within the workbook so to ensure proper use and saving of the details added to the workbook for the specific project.
- Save the workbook often or turn on autosave this will ensure you do not lose your data.
- Name the workbook something to easily identify which project the workbook is referencing so when you create the online application you can put this name in the project name field.

- Save the workbook as a .xls or .xlsx (excel extension) to upload to the application.
- When first opening the workbook, the user must click on 'enable content' this will ensure all calculations are utilized properly to ensure accurate totals for you to add to the online application.
- The workbook has helpful hints imbedded throughout the workbook. As you enter data or need help entering data there will be hover over boxes that will pop up similar the image shown here.



- Measure Entry: The user should begin entering on the first line of the details page, however no matter where they begin entering measure details the WB will account for COMPLETED measure per row.
- IF a measure is entered but a 'green' completed message is not in the first column associated with the row it will not be utilized in calculating totals and will not transfer to the online application when submitted.
- Incentive Guide should be used to ensure all entries made on the measures are complete and by the book https://bizsolutions.energysavenj.com/wp-content/uploads/2023/09/BR_JCPL-Incentive-Guide_-PUB_FINAL.pdf
- Link at top of grid
- Note you cannot combine Lighting Projects with other types of Projects, measures will not be available for Lighting any other way.

Lighting Workbook link:

<https://bizsolutions.energysavenj.com/wp-content/uploads/2023/08/JCPL-Lighting-Workbook.xlsx>

Where do I find the Workbook?

The above link is for you to download the most current version of the workbook.

The workbook is accessible via a link on the application and other strategic places throughout the website for ease of use. We outline below the common areas to find the workbook for download.

FAQ Page

A specific area to answer frequently asked questions.

[Program FAQs – JCPL Bizsolutions \(capturesportal.com\)](https://bizsolutions.energysavenj.com/capturesportal.com)

The workbook is located on the FAQ/Resource Page <https://bizsolutions.energysavenj.com/wp-content/uploads/2023/08/JCPL-Lighting-Workbook.xlsx>

New Application Page

The workbook can be accessed from the “New Application page” as shown below when signed in as a Program Ally or accessing this page as a customer. In the menu you go to Applications, New Applications and this message is displayed for you to see.

For Lighting Projects you must fill out a [Lighting Workbook](#) prior to submitted an application.
If you need assistance filling out the Lighting Workbook click [here](#).

Please enter the account number from your JCP&L bill where the Energy Efficient project is being installed. If you need assistance, please contact the JCP&L Program at 866-527-5249.

Account Number (First 12-digits only, No Dashes or Spaces) *

Customer Name (must match name on utility bill) *

[Next](#)

Costs of these programs may be recovered through customer rates in accordance with New Jersey law. For a complete list of commercial, industrial, residential and low-income energy efficiency programs, please visit [energysaveNJ.com](#).

By participating in these energy efficiency and peak demand reduction programs, customers agree to allow their utility to retain ownership of all Capacity Rights which refers to the demand reduction associated with any energy efficiency and peak demand reduction measure for which incentives were provided by the Company. Your utility will aggregate these energy efficiency demand reduction attributes into the PJM capacity market with proceeds being used to offset the program costs.

JCP&L's energy efficiency programs are administered by TRC, a third-party implementation specialist that helps homes and businesses save energy.

Program Ally Main Dashboard Page

When signed in as a Program Ally there will be a message reminding the applicant if they are submitting a Lighting project application that they should download the workbook first and link will be accessible in the same fashion as the above screenshot.

First Page of Application

On the first page of the application, you will again be reminded of the need for the Lighting workbook with the accessible link.

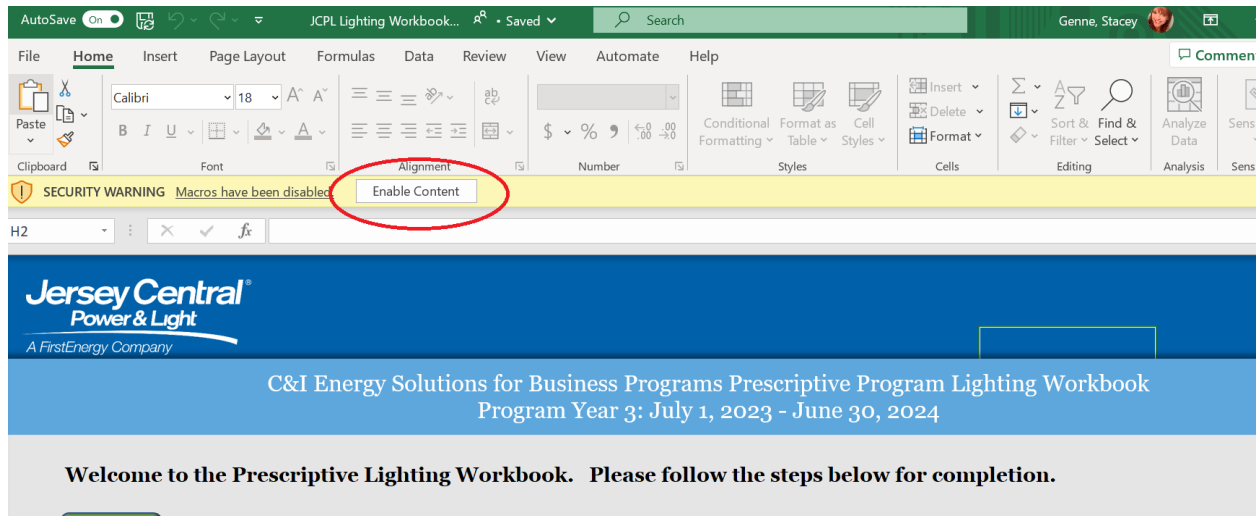
If any applicants are still not finding the link to the workbook for use, they can contact the Program team.

How do I use the Workbook?

When clicking the link to the workbook it will download automatically to your computer. If you do not see the link on the screen, go to your local 'download' folder to retrieve the file. The workbook should automatically download into Excel on your computer. The first thing you should always do is 'Save the workbook to your local computer.' Some helpful hints are shown below.

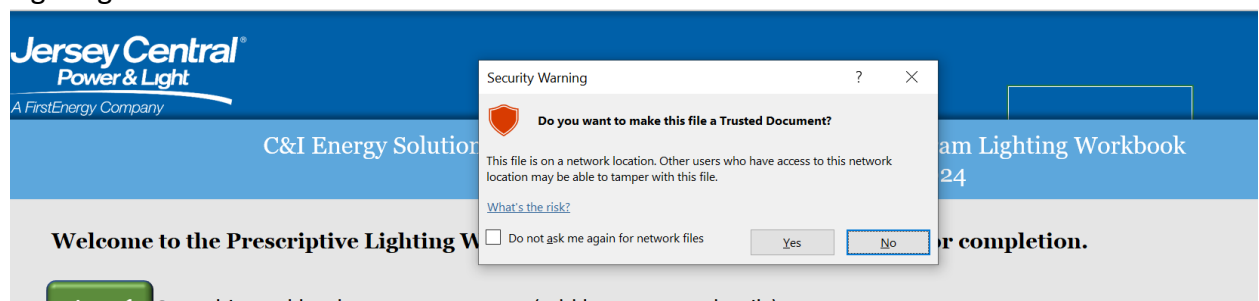
- **Ensure you always download the latest copy** of the Lighting Workbook before starting a new application, this will ensure you have the latest updates.

- Ensure you have the [Lighting Workbook Open in the Microsoft Excel Application](#) not in a Browser or another program like a common application used Microsoft Teams. This is best practice, not all features will work if it is not open in the Excel Application and could cause incorrect actions.
- [Enable Content](#) -Each time you open your Lighting Workbook it will require you to “Enable Content”. By clicking the “Enable Content” button like shown in the screenshot



below you are allowing the workbook to utilize behind the scenes content to ensure proper formulas and “Content” is being used to finalize the calculations that are expected.

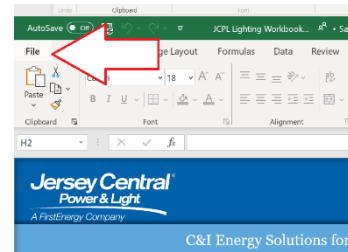
- [Trusted Document](#) - Some networks will require you to confirm that you want to make this a ‘trusted document’. TRC ensures that the documents we share can be trusted and are not going to be harmful to your network. For further information [Trusted documents - Microsoft Support](#). If you check the box that is available ‘Do not ask me again for network files’ this will not be required to answer each time you open the Lighting Workbook.



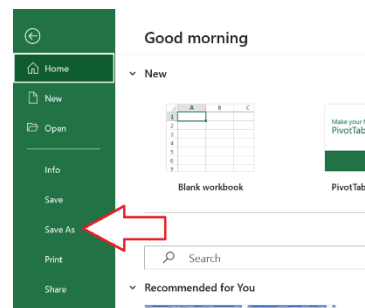
Best Practice is to save the Lighting Workbook would be to turn auto save on.

- **SAVE your workbook.** First you must save the Lighting Workbook to your computer using an easy to recognize name. [Then you will be able to turn on AutoSave]

In the top left corner click on 'File'



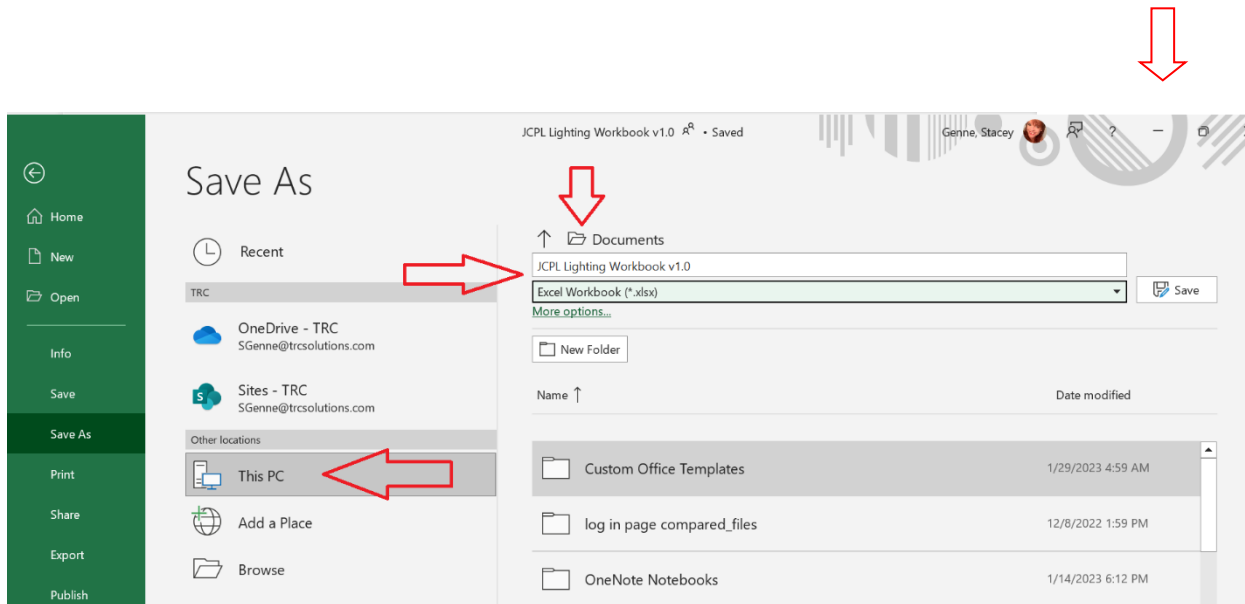
Then Click on Save As



Save the Lighting Workbook somewhere you can easily find it on your PC: inside a folder you will know such as 'Documents'.

- **Name the Lighting Workbook** using a name that will allow you to easily identify what 'Project' this workbook is being create for. Example: Lighting Project XYZ - You should put this name on the Online Application as well.

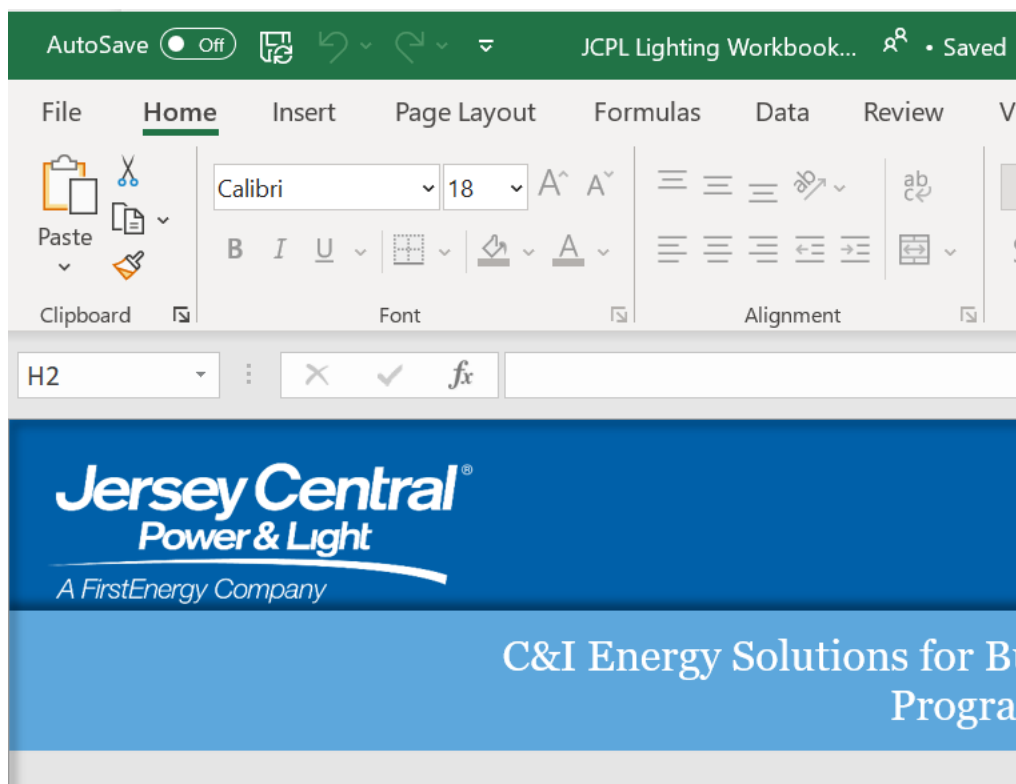
The workbook should be saved with the extension 'Excel Workbook' (*.xlsx)



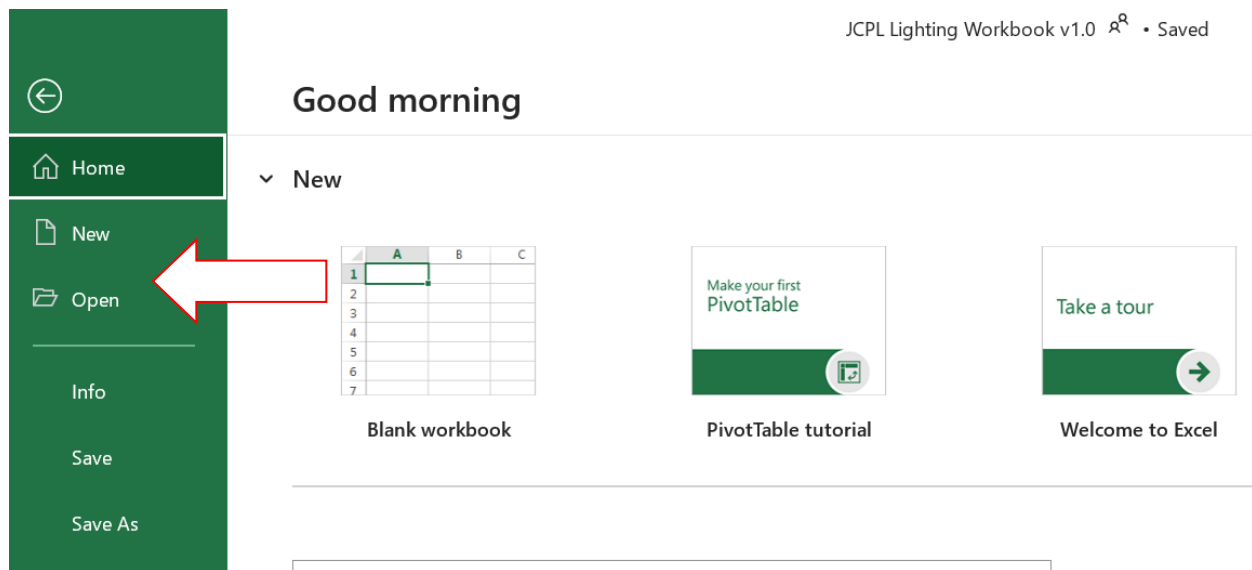
Once you click the SAVE button, turning on 'AutoSave' is recommended.

- Turn on AutoSave in the top left corner of the workbook in Excel.

Best Practice: Turn on Auto Save so your data is always saved never lost.



The AutoSave will automatically save as you enter data to ensure you do not lose any of the information you input. If you do not turn on AutoSave; then you should save your workbook periodically to ensure no data is lost.



Save for Later

This is an important feature. IF the end user has not completed the WB before starting the application they will likely be in the middle of the application and need to navigate away to finalize the WB details. They can use the second page of the application to save for later and come back. This function sends the applicant a direct link to the application.

If you have not completed the first page of the application the Save for Later feature is not available. Once you have completed the second page of the application the application is automatically saved behind the scenes and will appear on the applicants pending application dashboard even if they do not 'save for later'. The save for later feature will send the applicant an email with the link to the application.

Filling out the Lighting Workbook

Step by step instruction for filling out the workbook are shown below.

- Open the workbook in excel application. Not a browser or any other applications that are excel simulators this can cause issues with calculations that are needed to provide the totals to enter on the OLA.
- Enable Content at the top of the workbook to begin using.
- Save the workbook using a name that will easily identify the project you are working on and in a location that you can easily access when uploading to the Online Application.
- Go to the HOME page of the workbook, screenshot below:

Jersey Central
Power & Light
A FirstEnergy Company

C&I Energy Solutions for Business Programs Prescriptive Program Lighting Workbook
Program Year 3: July 1, 2023 - June 30, 2024

Welcome to the Prescriptive Lighting Workbook. Please follow the steps below for completion.
All Lighting Projects require this Lighting Workbook to be uploaded to the application when it is submitted.

step 1 Save this workbook to your computer so that you do not lose your data and can easily identify this file for upload into your online application.

step 2 Select the building information from the dropdowns below (must be selected prior to entering measure details):

Building Size Building Type Space Conditioning Type

step 3 Enter lighting measures by clicking here:

step 4 Once finished, confirm that all lighting measures show a green "Measure complete" status in the left column of the Measure Details page. Then click on the Measure Summary button to review:

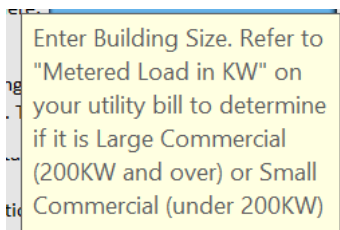
step 5 The Measure Summary shows the total incentive and savings amounts that must be entered on the Online Application. Please proceed to the online application here to complete your submission: <https://bizsolutions.energysavenj.com/>
This workbook **MUST** be attached to your submitted online application.
For additional instructions on how to use this workbook or the Online Application, click [here](#).

The applicant must first select the

- Building Size
- Building Type
- Space Conditioning Type

Note: these three fields are manually chosen in the WB, once the applicant fills out the OLA these fields are repeated inside the application. The fields in the application are populated from Captures if these fields have data in them. If they do not have data, the applicant will fill these fields in manually on the OLA. There is a chance that the fields on the WB and on the OLA/Captures will be different since this is a manual entry. The program team has taken the responsibility to ensure they review this for clarification as needed.


NOTE: By hovering over some select fields within the workbook will provide helpful hints or information about those fields. IE Building Size as shown in the screenshot below:



[Choices that are included in the drop down for this field are shown below]

- Building Size: Option Set Provided
 - Small Commercial
 - Large Commercial
- Building Type: Option Set Provided
 - Education – Community College
 - Education – Primary School
 - Education – Secondary School
 - Education – University
 - Grocery
 - Medical – Clinic
 - Medical – Hospital
 - Multi-family – Common Areas
 - Multi-family – Exterior
 - Multi-family – In Unit
 - Office – Small
 - Office – Large
 - Other
 - Retailer – Small
 - Retailer – Large
 - Warehouse/Industrial – Small
 - Warehouse/Industrial – Large
- Space Conditioning Type: Option Set Provided
 - Electric Cooling & Gas Heat
 - Electric Cooling & Oil Heat
 - Electric Cooling & Propane Heat
 - Electric Cooling & Resistance Heat
 - Heat Pump
 - No Electric Cooling (Resistance Heat Only)

[Note: IF these three fields are not filled out the measure details will not render properly on the measure entering page. The applicant will receive an error in RED as shown below telling them to return to the home page to select the proper details for those three fields.]



A FirstEnergy Company

*Any measures not showing "Measure Complete" will not be included in your online application submission.

Home

Measure Summary

General/Location

Installation Type

Installed Location

Lighting Location

Building Information on Home page is missing

- Entering Lighting Measure Details** [Button located on the Home Page]
 - The user will click 'Enter Lighting Measure Details'
 - The Measure Details page will be in a linear grid format for ease of entering multiple measures on the same application.
 - The user should begin entering on the first line of the details page, however no matter where they begin entering measure details the WB will account for COMPLETED measure per row.
 - IF a measure is entered but a 'green' completed message is not in the first column associated with the row it will not be utilized in calculating totals and will not transfer to the online application when submitted.
 - Incentive Guide should be used to ensure all entries made on the measures are complete and by the book [BR JCP1.pdf \(energysavenj.com\)](#) – Link at top of grid

The details that the applicant fills out on the actual workbook document under the Measure Details are shown below in a chart which highlights the field names, which fields are mandatory and what each field is defined as and used for.

Field Group	Field Name	Use	Selections	Notes
Installed Location		To identify exact location on the premises (ie. Office, cleaning room, side awning)	Manual entry identifying where on the property this is installed or being installed.	Used for inspectors
Lighting Location		Lighting Location using drop down	Interior, exterior, Parking Garage Lights, Parking Lot Lights	

Installed Lighting Equipment	Category	Identify the Lighting Category this application is for	Category chosen drives the Description	Should match the Incentive Guide
	Description	Description of installed equipment	Manual input or options provided	Must choose from approved selection
	Subcategory	If Blank, it needs no other information	Select from drop down menu	
	Incentive	A read-only field used to calculate incentive per entries made on the WB	No selections	Incentive rate from Incentive Guide
	Unit	A read-only field used to calculate incentive per entries made on the WB	No selections	As per the incentive guide indication
	Watts Per Unit	Manual Input of Watt details	No selections	According to the DLC or Energy Star sheet
	Number of Installed Units	Number of installed fixtures	No selections - manual input	Fixtures quantity installed
	Replacement Type	To identify why they are being replaced	Early Retirement, Replace on Burnout	Either still working or immediate replacement
	Manufacturer	To identify the manufacturer the equipment is from	No selections, check equipment	Fixture manufacturers follow DLC description
	Model Number	To identify the model number of the equipment used	No selections, check equipment	Follow DLC description
	Product ID: DLC/Energy Star	To identify the Product ID of the equipment used	No selections, check equipment	Type in DLC Product ID description
	Lumens	Identified for the equipment used	No selection, Check DLC	As per DLC
	Fixture umol/J {Horticultural Only}	Horticultural equipment identifier only	No selection, Check DLC	As per DLC
	Equipment Cost	Total Material Cost before taxes to use for calculations on incentive and savings, to calculate capping	No selection	Total material costs before tax
	Labor Cost	Labor total cost for installing the equipment being applied for on each fixture	No selection	Labor total costs per each fixture
Existing Lighting Equipment	Category	Pick the category for the existing fixtures that are being replaced on this project	Category list presented	Select from category the existing fixture to be replaced
	Description	Driven from the Category to describe the existing fixtures	Description list presented	Select from drop-down menu
	Default Watts Per Unit	A read-only field to calculate the Watts per unit derived from the information inputted.	No selection	Auto populated from information

	Actual Watts per Unit	A read-only field to calculate the Watts per unit derived from the information inputted.	No selection	Auto populated based on selections
	Number of Existing Units	To tell how many units there were before any installation or replacement	Manually entered	Total of units before any installation
Type of Fixture Controlled (if applicable)	Category	Used if fixture shows a controlled, will automatically show a selection to use if applicable	Select from drop down menu	The DLC or Energy Star type that is being controlled
	Description	Driven from the Category to describe the controlled fixtures	Select from drop down menu	
	Subcategory	Driven from the Description for controlled fixture	Select from drop down menu	If applicable (per DLC)
Grand Totals	Incentive Capped at Measure Cost?	Read-Only fields auto calculated from the details entered on this line item, to show if this measure has been automatically capped	Auto-populates yes or no	These totals will be used to insert the details into the online application when submitting
	Incentive	To show the total estimated incentive that the information provided is calculating	Each row will show its individual incentive total and is used to provide the grand total at the top of this column	Incentive will populate when the line is completely filled
	Estimated KWH saved	To show the total estimated KWH Savings that the information provided is calculating	Same for KWH Saved as above comment	Auto populated based on inputted information
	Estimated KW Saved	To show the total estimated KW that the information provided is calculating	Same for KW Saved	Auto populated based on inputted information
	Estimated Therms Saved	To show the total estimated THERMs that the information provided is calculating	Same for Therms Saved	Auto populated based on inputted information

When is a measure considered complete?

Once the measure details are entered you will have a 'green' message - "Measure Completed" in the first column of that line item as shown below:



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Power & Light
A FirstEnergy Company

*Any measures not showing "Measure Complete" will not be included in your online application submission.

[Home](#)
[Measure Summary](#)

Replace

Type

1. Measure Complete - Incentive: \$1,500.00

Complete highlighted fields

Early Retire

Replace-On-B



Jersey Central[®]
Power & Light
A FirstEnergy Company

*Any measures not showing "Measure Complete" will not be included in your online application submission.

[Home](#)
[Measure Summary](#)

1. Measure Complete - Incentive: \$1,500.00

Measure must result in savings. Please check existing versus installed wattage.

Retro contr


Retro occup

If there is a 'red' error message shows this line item must be completed or fixed before it will be included in the submission of the application.

NO RED ERRORS ALLOWED

Measure Summary Page

This page will list all the measures that are entered on this workbook and will be submitted with the application. Remember if it is not completed in the details page it will not show on the summary page to be included in your totals.

<div>  <div> Home Enter Measure Detail </div> </div>						
C&I Energy Solutions for Business Programs Prescriptive Program Lighting Workbook						
Program Year 3: July 1, 2023 - June 30, 2024						
Installed Location	Name	Quantity	Incentive	Estimated kWh Saved	Estimated Therms Saved	Click to Edit
Totals: All Measures on this workbook		110	\$3,000.00	24,076.25	-26.27	
*These totals will be used to insert the details in the online application when submitting						
1	Garage	High-Bay Luminaires for Commercial and Industrial Buildings 10,000 - 19,999 Lumens	10	\$1,500.00	2,549.25	-2.78
2	House	LED Linear Style Retrofit Kit for 2x2 Fixtures	100	\$1,500.00	21,527.00	-23.48

What will be entered on the Online Application from the workbook?

Once the user is complete with filling out the excel document “Lighting Workbook”, they have saved it on their computer with a easy to remember name associating it to the application they are submitting they will need to be sure to view the 4 fields that will be manually inputted in to the Online Application they are submitted. [Along with also uploading the actual excel document to the application prior to submission]

Navigate to the Measure Summary page on the excel document.

This page will show the totals of the four fields that the applicant will need to enter into the Online Application before submission. [Incentive, Estimated KWH Saved, Estimated Therms Saved] Note the ‘quantity’ is the number of measures on the one application that is being submitted. The Amounts are all the total measures added together to produce your grand total for Incentive, KW and KWH Savings as well as Therms Saving totals.

The screenshot shows an Excel spreadsheet titled "Jersey Central Power & Light C&I Energy Solutions for Business Programs Prescriptive Program Lighting Workbook". The spreadsheet has a table with the following columns: Installed Location, Name, Quantity, Incentive, Estimated kWh Saved, Estimated KW Saved, Estimated Therms Saved, and Click to Edit. A summary row is highlighted with the text "Totals: All Measures on this workbook". Below the table, a note states: "*These totals will be used to insert the details in the online application when submitting. All incentives are estimates until verified by the program team."

Once you have entered those fields on your online application and you can close the workbook, making sure it is saved in a place you know how to get to upload it on the application.

Finalizing my workbook

Ensure you review the workbook details and that your totals are showing what you are expecting. Save the workbook using a name you will recognize when uploading to the online application.

Now you are ready to go online to start and submit your Lighting project application for the incentive.

Where is the Online Application located?

If you are a Program Ally log-in to the Portal. Click on the New Application and begin entering the data it is asking for.

If you are a customer, just go to the menu under applications and click on new application.

Along the way you will see links to the Lighting Workbook and the How to guide as needed, those are just helpful hints and links to help you along the way, you should ALWAYS download a new version of the workbook for a new lighting project so you are sure you are getting all the latest updates on measures to calculate your incentives properly.

Understanding the validation process

The validation process for new applications is the same, always enter the name and account exactly as it appears on the bill.

Once you pull up the application you will begin, and the first thing associated with the Lighting Project is shown below.

On the application in the Portal, there is a checkbox asking if this is a Lighting Project. See screenshot below. This will bring up several fields that are required to fill out using the Workbook calculations found on the Measure summary page. You want to use the total of all the measures being applied for on the application.

The screenshot shows a web browser window with the URL <https://jcpl.stg.capturesportal.com/Online/OnLineApplication>. The page title is "C&I Energy Solutions for Business Programs: Prescriptive & Custom Program". The form is titled "Submitter Information" and contains the following fields:

- I am completing this application as the ***: A dropdown menu with "Program Ally on behalf of a custom" selected.
- How did you hear about the program? ***: A dropdown menu with "--Select--" selected.
- Is this a completed project? ***: Radio buttons for "Yes" (selected) and "No". A note below states: "(Completion is defined as all equipment begin installed and operable)".
- Date of Installation ***: A date field with "09/14/2023" entered.
- Is this a Lighting Project Application? ***: Radio buttons for "Yes" (selected) and "No".
- Have you filled out your Lighting Workbook?**: A text block with instructions: "No? Click [here](#) to download the workbook, complete the workbook and then start your application. Yes? Return to the measure summary page on the workbook and fill out the below fields with the estimated amounts displayed on the workbook. For assistance filling out the Lighting Workbook click [here](#) or contact your program team."
- Total Estimated Incentive (\$) ***: A text input field.
- Total Estimated kWh Saved ***: A text input field.
- Total Estimated Therms Saved ***: A text input field.

The form is followed by a section titled "Company Information".

Completing your online Application

This checkbox is to be YES if it is a lighting project application, you cannot submit a lighting application without the workbook updated and attached to the application.

NOTE: You cannot submit Lighting measures and non-lighting measures on the same application.

This field is mandatory and if yes is chosen the follow will be invoked:

1. Four fields will pop-up to enter amounts from the workbook you already filled out: Estimated Incentive, Estimated KWH, Estimated KW, and Therms Savings. You will fill those fields in manually using the calculated details from your workbook that you will be uploading to the application.
2. Measure Tab is removed from all areas of the application because you must use the workbook for measure information and calculating the incentives and savings amounts.
3. The Lighting Workbook is mandatory to be added on File Upload page.
4. The Review and Submit Page at the end of the application will show a summary for confirmation of the savings and incentive the application is estimated for.

Adding Amounts to the OLA from the WB manually by the Applicant

Three fields will pop-up to the right of the question and will be mandatory on the first page of the application:

- a. Estimated Incentive Amount
- b. Estimated KWH Saved
- c. Estimated Therms Saved

These fields are taken directly from the workbook that you filled out and is located on the top of the Measure Summary.

Name	Quantity	Incentive	Estimated kWh Saved	Estimated Therms Saved
Totals: All Measures on this workbook	110	\$3,000.00	24,076.25	-26.27

**These totals will be used to insert the details in the online application when submitting*

Note: If the measure entered on the 'Measure details' page of the Workbook are not showing a 'green' completed status in the first column then these will not be included on the submitted application.

If you begin the application and you do not already have the workbook filled out, you can go to the workbook directly and save the application for later. [Check out the save for later instructions in this document]

Workbook is located here: <https://bizsolutions.energysavenj.com/wp-content/uploads/2023/08/JCPL-Lighting-Workbook.xlsx>

These three fields that you manually enter from the workbook details will also be carried over to the header of each additional page of the application for your review.

Note: There will be a link to the workbook on the application.

Filling out the Online Prescriptive/Custom Application

Once you are ready to fill out the application online the below charts will assist with definitions on each field.

1st Page of OLA: Company and Site Information

Mandatory	Section	Field	Details	Notes
Y	Submitted Information	Completing App for Who? [Auto populated field]	Self [customer] PA for a customer Distributor for a customer	Auto populated not editable
Y		How did you hear about us?	Use Selection drop down	manually entered
Y		Is this Project Completed?	Yes or no – conditional date is requested to be added	manually entered
Y		Funded by NEIF? [This will be an option if it is not an installed project]	Yes or No	manually entered
Y	Company Information	Company Name	Name of company installed for, auto populated from validated account	Auto populated not editable
		Legal Company Name	Name if other	manually entered
Not Mandatory		Customer Classification	customer classification: Commercial, Federal, Government, Industrial, Institutional, Multifamily, Not for Profit	Auto populated not editable
Y		Company Address	Auto populated from the Address on the Utility Bill / this is the mailing address	Auto populated not editable
Y	Site Information	Site Name	name on utility bill	Auto populated not editable
Y		Gas available	Is Mandatory	If yes gas company name is mandatory
Y		Account Number One	This is to identify the account you use	Auto populated not editable

Y		Gas Company	Pick the Gas Co name if you have gas available	Selections available in drop down
Y		Account Number Two	If you have two accounts	Auto populated not editable
Y		Site Address	Address of the Site on the Utility Bill	Auto populated not editable
Y		Zone Type	Mandatory to tell what type of zoning the site is in, used for reporting purposes	Selections available in drop down
Y		Building Type	If the site had this detail filled out it is auto populated, but is used to understand the code for the site, used for reporting purposes and measure qualifications	is auto populated if in the site record but can be edited
Y		Existing Ownership	rent or owned, used for reporting purposes	is auto populated if in the site record but can be edited
Y		Building Type Other	used if nothing fits the category and then they are required to make a manual entry to describe	
Y		Annual Operating Hours	Total Hours used annually that the company is operating, is auto populated if details are in the site record, but is editable, used for reporting purposes	is auto populated if in the site record but can be edited
Y		Space Conditioning Type	Selections available, will auto populate if the site record has information or they have to manually input, used for reporting and/or measure qualifications and calculations	is auto populated if in the site record but can be edited
		Square Footage	How big is the site for this project for reporting purposes	new application is not auto populated but needs manually entered
Y		Water Heating Type	Type of heating used to heat the water at the site for reporting and qualifications on measure calculations	is auto populated if in the site record

				but can be edited
Y		Facility Type	use for the facility to identify the type of facility for reporting purposes	is auto populated if in the site record but can be edited
		Number of Floors	Used to identify size of building for reporting purposes	is auto populated if in the site record but can be edited
Y		Project Name	A name for you to easily identify this project application	manually entered
Y		Building Size	According to the bill what size are you showing for this site, selections are large or small	is auto populated if in the site record but can be edited
		Year Built	What year was this site built in, used for reporting purposes	is auto populated if in the site record but can be edited

2nd Page of the Application: Contact Information

Company Name: ZZ_Test Company2 Application ID: OLA_4799022
 Application Status: In Progress-not Submitted - 1 Site Name: ZZ_Test Company2
 Total Incentive: Estimated kWh Saved:
 Estimated Therms Saved:

Company and Site Information Customer Contact Information Program Ally Payee Information Measures File Upload Review and Submit

Contact Information

Technical/Facility Contact

The technical and/or facility contact is the individual at the site whom the JCP&L Program may contact in the event of an inspection.

Company Name * ZZ_Test Company2
 First Name * Last Name *
 Title * Mobile Phone
 Main Phone *
 Email *

Customer Contact

The customer company is the company/organization as listed on the utility bill. The customer company contact must be from within this company/organization.

This contact is the individual authorized to sign the application, and will receive an email to electronically sign the application via the email address provided.

Company Name * ZZ_Test Company2
 First Name * Last Name *
 Title * Phone *
 Email *

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Mandatory	Section	Field	Details	Notes
Y	Technical/Facility Contact	Company Name	Site Company Name auto populates is editable	The technical and/or facility contact is the individual at the site whom the JCP&L Program may contact in the event of an inspection
Y		First Name	Who is the technical contact for this site	manual entry
Y		Last Name	Who is the technical contact for this site	manual entry
Y		Title	What is the technical contacts title for this site	manual entry
Y		Main Phone #	What is the main phone # for this site	manual entry
		Mobile Phone	if applicable add mobile phone	manual entry
Y		Email	Technical contact persons email address	manual entry
Y	Customer Contact	Company Name	Site Company Name	auto populates is not editable,

Y		First Name	This contact is the individual authorized to sign the app via the email shown below	manual entry
Y		Last Name		manual entry
Y		Title		manual entry
Y		Phone	Phone number to use to call primary contact	manual entry
Y		Email	this email receives the sign from adobe sign	If the email listed on this application under customer contact below does not match the name on the customer utility bill a letter confirming the connection should be uploaded to this application.

Each section is filled out and the next button is used to advance through the application.

Next Section is:

3rd Page of the Application: Program Ally

Many times, the submission is coming from the Program Ally. IF there is 'NO' Program Ally associated the applicant would answer NO to the first question on this page and then advance to the next section. IF YES, the applicant should fill out all the mandatory fields to advance the application.

Company Name:	ZZ_Test Company2	Application ID:	OLA_4799022
Application Status:	In Progress-not Submitted - 1	Site Name:	ZZ_Test Company2
Total Incentive:		Estimated kWh Saved:	
		Estimated Therms Saved:	

Company and Site Information	Customer Contact Information	Program Ally	Payee Information	Measures	File Upload	Review and Submit
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Program Ally Information

Is there a Trade Ally or Vendor for this Project? *Yes ☒ No: ☐

Program Ally/Contractor Name *

First Name *	<input type="text"/>	Last Name *	<input type="text"/>
Title *	<input type="text"/>	Email *	<input type="text"/>
Main Phone *	<input type="text"/>	Mobile Phone	<input type="text"/>

Address Search

Address:

Address *	<input type="text"/>	Address 2	<input type="text"/>
City *	<input type="text"/>	State *	<input type="text"/>
ZIP *	<input type="text"/>		

Previous	Save For Later	Next
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The next section is:

4th Page of the Application: Payee Information

This section is where the applicant provides details on who the incentive will be sent to upon approval. User will input the Payee information in this tab and then select 'Next'

Company Name:	ZZ_Test Company2	Application ID:	OLA_4799022
Application Status:	In Progress-not Submitted - 1	Site Name:	ZZ_Test Company2
Total Incentive:		Estimated kWh Saved:	
		Estimated Therms Saved:	

Company and Site Information

Customer Contact Information

Program Ally

Payee Information

Measures

File Upload

Review and Submit

Payee Information

Enter the Payee Information below. Some information may be auto-filled based on your selection, but you may overwrite the data if necessary.

Payee Type *	—Select—	Tax Entity *	—Select—
		<small>The selection must match the Federal Tax Classification box checked on the IRS.</small>	
Company Name *		Federal Tax ID Number *	
First Name *		Last Name *	
Main Phone *		Confirm Email *	
Email *			
Address:			
Address *		Address 2	
City *		State *	
ZIP *			

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The next section is:

5th Page of the Application: Upload Files

This section is used to upload associated documents to this application. Required documents are listed.

The File Upload tab will require several documents as listed below to be provided when submitting the OLA. This will help validate the measure requesting incentive and it will also validate the company's information.

Company Name:

ZZ_Test Company2

Application ID:

OLA_4799022

Application Status:

In Progress-not Submitted - 1

Site Name:

ZZ_Test Company2

Total Incentive:

\$300.00

Estimated kWh Saved:

45,864

Estimated Therms Saved:

0

Project Summary

Company and Site Information

Customer Contact Information

Program Ally

Payee Information

Measures

File Upload

Review and Submit

Upload Project Documents

Attached files should be in jpg, gif, png, bmp, tif, doc, docx, xls, xlsx, or pdf format, and should be no larger than 3 MB.

File Name	File Type	Delete ?
ACE SBDI test.PNG	Utility Bill	
Duplicates.PNG	Specification Sheets	
JCPL Issue stg captures.PNG	DLC/Energy Star/AHRI	

Showing 1 to 3 of 3 entries

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Next

Please gather and upload the following documents pertaining to this project.

Required:

- Utility Bill (no more than 12 months old)
- Specification Sheets
- DLC/Energy Star/AHRI (requirements to see if LED qualifies or HVAC qualifies)

Recommended:

- Payee Company's W9 (handwritten signature, no more than 24 months and federal tax classification noted)

If Applicable:

- Calculation or Model Output
- Letter of Attestation (with customer handwritten signature)
- Other

Click here to select file(s)

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The next section is:

6th Page of the Application: Sign and Submit

This section provides a summary to the applicant of all the details they are submitting with this application. Any missing mandatory fields will be shown and will not be allowed to be submitted until they are all showing completed.

Upon submission this kicks off the Adobe signature process.

The review and submit tab will have a check list of all the tabs on whether information is completed or needed. If it is needed, it will display as 'Missing' and user cannot advance on the OLA to submit it.

Company Name:

ZZ_Test Company2

Application ID:

OLA_4799022

Application Status:

In Progress-not Submitted - 1

Site Name:

ZZ_Test Company2

Total Incentive:

\$300.00

Estimated kWh Saved:

45,864

Estimated Therms Saved:

0

Project Summary

Company and Site Information

Customer Contact Information

Program Ally

Payee Information

Measures

File Upload

Review and Submit

Completion Checklist

Company and Site Information	Complete
Customer Contact Information	Complete
Program Ally	Complete
Payee Information	Complete
Measures	Complete
File Upload	Complete

Next Step

- Click Next to view the Terms and Conditions and send them to an authorized JCPL Program customer for signature. You will receive a confirmation email that the application has been submitted and the Terms and Conditions are signed.
- After you are approved to perform selected savings, all projects are subject to random inspections. If you receive a call from one of our inspectors, they will refer to the project, ask a few questions, and perform a verification.
- Please let us know in writing or call any questions about this project or any other projects.

• Toll free 888-657-6246

• info@energy.com

Next

User can review the information on the OLA before the OLA is submitted.

YOU HAVE COMPLETED YOUR LIGHTING PROJECT SUBMISSION

USING THE NEW LIGHTING WORKBOOK!

Next Steps you will receive an email from a JCPL Case Manager to process your application and an email with a request for the applicant "YOU" to sign that the details entered are entered with proper information and you understand that the total calculations on incentives and savings are estimated.