eProjectBuilder

User Guide: NAESCO Accreditation

U.S. DEPARTMENT OF ENERGY
Energy Efficiency & Renewable Energy

BERKELEY LAB

Table of Contents

Quick Tips

Please review this critical information before beginning your accreditation application:

* Items 1-3 below apply to all applicants. Items 4 through 10 apply to ESCO and ESP applicants only)

General

1. Watch the short eProject Builder (ePB) NAESCO Accreditation training video, available under "Training and Informational Videos" on the ePB Help & Documentation page.
2. Use one of the following supported internet browsers to submit your application in ePB: Firefox 63 or higher, Chrome 70 or higher, Edge 75 or higher, Opera 57 or higher, Safari 12.1 or higher Please note that Internet Explorer is not supported by eProject Builder.
3. Only one eProject Builder account can be associated with an application. If multiple members of your organization will be working on an application, set up an organizational-level account using an email account that your team members have access to (e.g. Accreditation@ApplicantCompany.com).

ePB Data Template

4. Initiate projects through the Accreditation feature, rather than through the "Portfolio" page.
5. When populating project information, use the latest version of the **non-calculating** ePB data template, available for download from the ePB Help & Documentation page under "Data Templates." The calculating template will not upload through the Accreditation feature.
    a. A non-calculating template with the required fields color-coded is available on the "Template Data" tab of the Accreditation feature.
    b. See Appendices B, C, and D for information on the required project data fields.
6. **Important:** Do not manipulate the ePB data template (e.g. by implementing macros, trying to change the formatting). The template will not upload to ePB.
7. **Important:** When copying and pasting data from another Excel file into the ePB data template, choose the "**paste values only**" option; if you paste whole cells or formatting from other documents, the template will not upload.
8. Save your ePB data template as an .xlsx format; other file types will not upload.

Other

9. Identify which projects you plan to use as reference projects. Thoroughly review the requirements for reference projects in the NAESCO Master File (section 4.2.1). Reference projects **must:**
    a. Have guaranteed energy savings and guaranteed energy cost savings
    b. Have a minimum of one year of measurement and verification (M&V) data
    c. Have a project acceptance date within a certain timeframe (see the NAESCO Master File for more information)
    d. At least 25% of the project implementation price (exclusive of financing) is for ECMs that have guaranteed savings and are measured and verified.
    e. Have a dollar value of resource savings plus avoided third-party O&M costs that equals or exceeds the dollar amount of the portion of the project that is financed.
10. Review Appendix F to see what data must be entered on the "Additional Data" tab (this is in addition to what applicants must provide in the ePB data template).

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Web: eprojectbuilder.lbl.gov

Overview

eProject Builder (ePB) is the platform by which ESCOs, ESPs and EECs submit their applications for accreditation with the National Association of Energy Service Companies (NAESCO). For more information on NAESCO accreditation, please visit: www.naesco.org/accreditation.

This guide assumes familiarity with ePB. NAESCO accreditation applicants are advised to attend an introductory ePB training webinar before beginning the application process. Applicants may also review the ePB on-demand webinar training video and the Getting Started Guide on the ePB Help & Documentation page as a refresher. Additionally, applicants should watch the ePB NAESCO Accreditation training video, available on the ePB Help & Documentation page.

IMPORTANT! Please use Firefox 63 or higher, Chrome 70 or higher, Edge 75 or higher, Opera 57 or higher, or Safari 12.1 or higher to submit your application in ePB. Internet Explorer is not supported for the NAESCO Accreditation feature.

1. Log into eprojectbuilder@lbl.gov, navigate to the "Applications" tab, and click "NAESCO Accreditation Applications."

2. From the NAESCO Accreditation page, click "+ New/Renewal Application" on the sidebar and designate the application type, category, and application cycle.

3. Upload the required materials in the "Documents" tab. The tab will display a green checkmark when all required documents have been uploaded.

4. Add projects to your application. Upload a completed non-calculating data template. Next, complete the fields in the "Additional Data" tab. Complete M&V information for reference projects. The "Projects" tab is considered complete once it displays a green checkmark).
*Note that only ESCO and ESP applicants need to complete the "Projects" section.

5. Submit application.

Getting Started

Download Instructions & Application Materials

Log into your account on the ePB site at eprojectbuilder.lbl.gov. Navigate to the accreditation feature by clicking the "Applications" tab at the top and selecting "NAESCO Accreditation." Click the appropriate link on the lefthand sidebar to download instructions for your application type (ESCO, ESP, or EEC). The application zip file contains:

1. Customer reference contact form
2. NAESCO's Application Instruction Master File
3. NAESCO's Ethical Guidelines
4. Applicant checklists (for both new and renewal applicants)
5. This ePB NAESCO Accreditation User Guide
6. **For EEC applicants ONLY** – NAESCO Project Summary spreadsheet for entering past projects

- ESCO and ESP applicants do not complete a project data spreadsheet as they may have in previous accreditation cycles; instead they will now upload project information directly into ePB using the non-calculating version of the ePB Excel-based data template for each of the projects to be included in the application.
- Note that in lieu of the transmittal letter previously required, the applicant contact information is now located in the checklist.

Create an Application

The accreditation feature is used to apply for first time (new) NAESCO accreditation or for accreditation renewal. To create an application, click the button on the accreditation home page. A box titled "New Accreditation Application" will pop up. Specify the appropriate:

- Application type (new or renewal)
- Category (ESCO, ESP, or EEC)
- Accreditation cycle (spring, fall, or other)
- Application year
- Alternative criteria. If you do not meet the minimum criteria for accreditation but still wish to apply for accreditation, select "yes" from the alternative criteria drop down list, which will enable you to send an explanatory message to the NAESCO Accreditation Committee. **New applicants may only select this option if they do not meet all of the normal accreditation requirements (specifically the number of projects or required documents).**
- Number of performance based and non-performance based projects completed in the past 60 months for new applicants or in the past 42 months for renewal applicants.

Click the "OK" button to create your application.

> All application information is automatically saved by ePB. No "saving" is required by users throughout the application process.
>
> You may return to your in-progress application as needed. To return to an in-progress application, return to the accreditation feature. Find your in-process application, click the three dots under the "Action" menu and choose "Edit."

Gather the Required Project Information

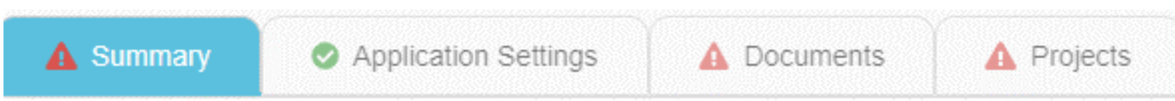
It is recommended that applicants gather the required information and keep it handy prior to beginning to enter project data. Applicants can expect to report the following information for their projects:

- General information — e.g. performance period duration, total square footage, award date, agreement type, implemented ECMs, total square footage, contact information for associated personnel.
- Financials — e.g. interest rate, applied incentives, implementation cost, project payments.
- Energy consumption — baseline energy consumption, as well as estimated and guaranteed energy and cost savings for relevant resource types.
- M&V — verified energy and cost savings for relevant resource types.

For a full list of required information, see Appendix C: List of all NAESCO required fields.

Overview of Your Application

After initiating your application, you will see several tabs related to your application.



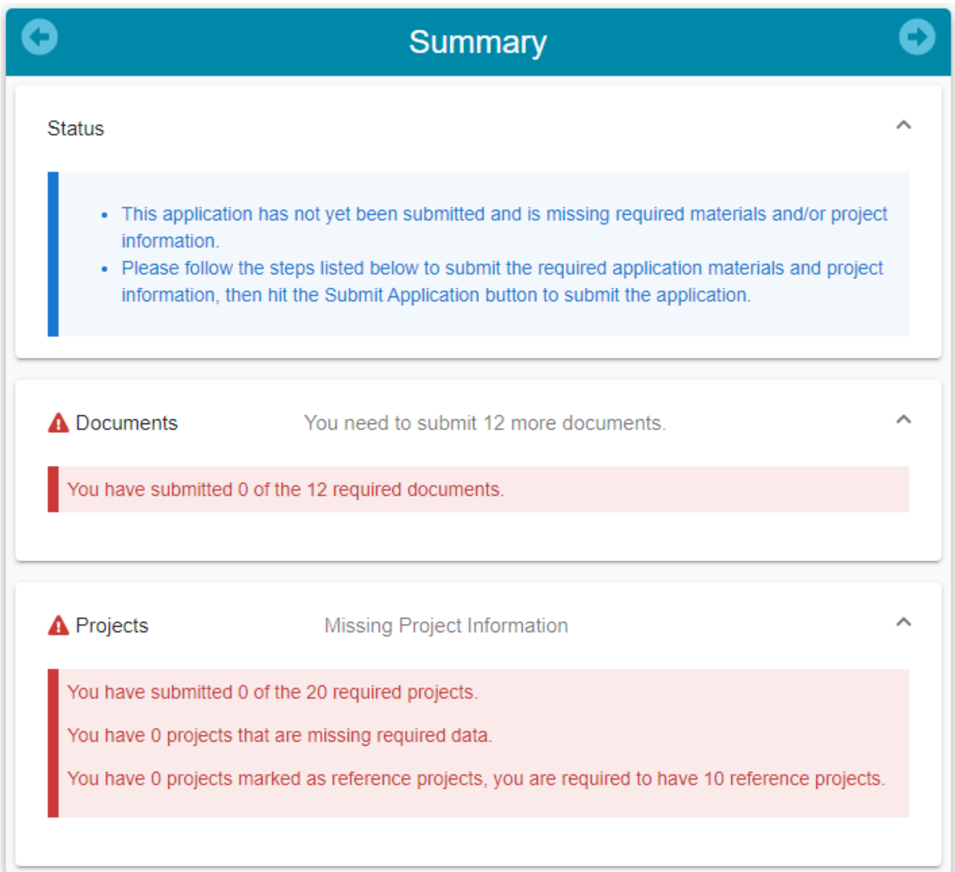
- Summary Tab: The Summary tab contains information on your application status, as well as outstanding documents and projects that need to be added before your application can be submitted. Navigate back to this tab as needed throughout the application process to determine any outstanding application requirements.
- Application Settings Tab: The Application Settings tab indicates the general application characteristics that were chosen at the time of application initiation
- Documents Tab: The Documents tab is where users upload relevant documents to their application.
- Projects Tab: The Projects tab is where users add new or existing projects to their application, upload the populated non-calculating ePB data template, and complete additional information for those projects that cannot be entered via the ePB data template. In addition, reference projects require at least one year of M&V data. Note that the "Projects" tab will not appear for EEC applicants, because they submit a Project Summary Spreadsheet (included in their application package download) in lieu of entering projects directly into the system.

The lefthand sidebar contains several links, including an "Accreditation Home" link – which redirects you to your Application Summary table (which contains all applications that have been associated with your ePB account). The sidebar also contains a progress indicator, which indicates the completion percentage of the application. Additionally, the sidebar contains the "Submit Application" link.

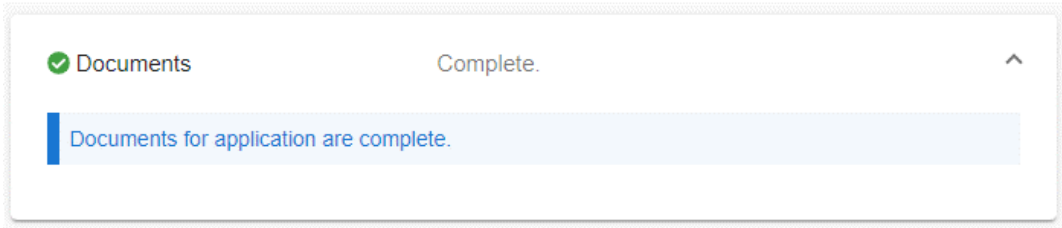
Summary Tab

After initiating your application, you will be directed to the Application Summary tab. This page provides an overview of your application status.

The Summary page contains three sections: "Status," "Documents," and "Projects." These sections summarize the missing components from your application. Navigate back to this tab as needed throughout the application process to determine any outstanding application requirements.



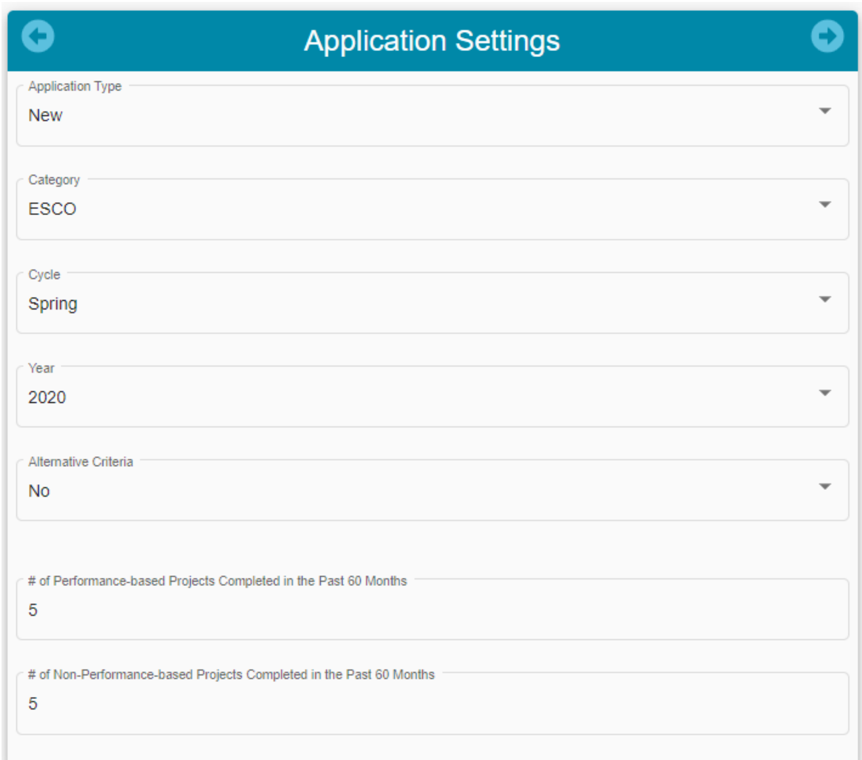
When requirements for a section of the application have been fulfilled, the red status bar turns green and indicates "Complete" (see example screen shot below).



Once the necessary sections are complete, your application is ready for submittal. ESCO and ESP applicants must complete both the "Documents" and "Projects" sections. EEC applicants need only complete the "Documents" section. **There is no "Projects" section for EEC applicants**.

Application Settings Tab

The Application Settings section indicates the general application characteristics that were chosen at the time of application initiation. Users can return to this tab to modify application settings (including application type, cycle, number of projects, etc.) after they have initiated their application.



Completing the Documents Section

The first step in completing your application is to upload all of the required documents into the appropriate panels of the Documents section. To do so:

1. From the Summary page, click on the "Documents" tab, or click the "Upload/Edit Required Documents" to navigate to the Documents section.

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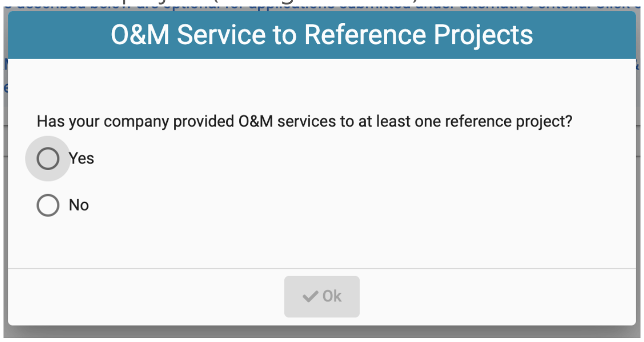
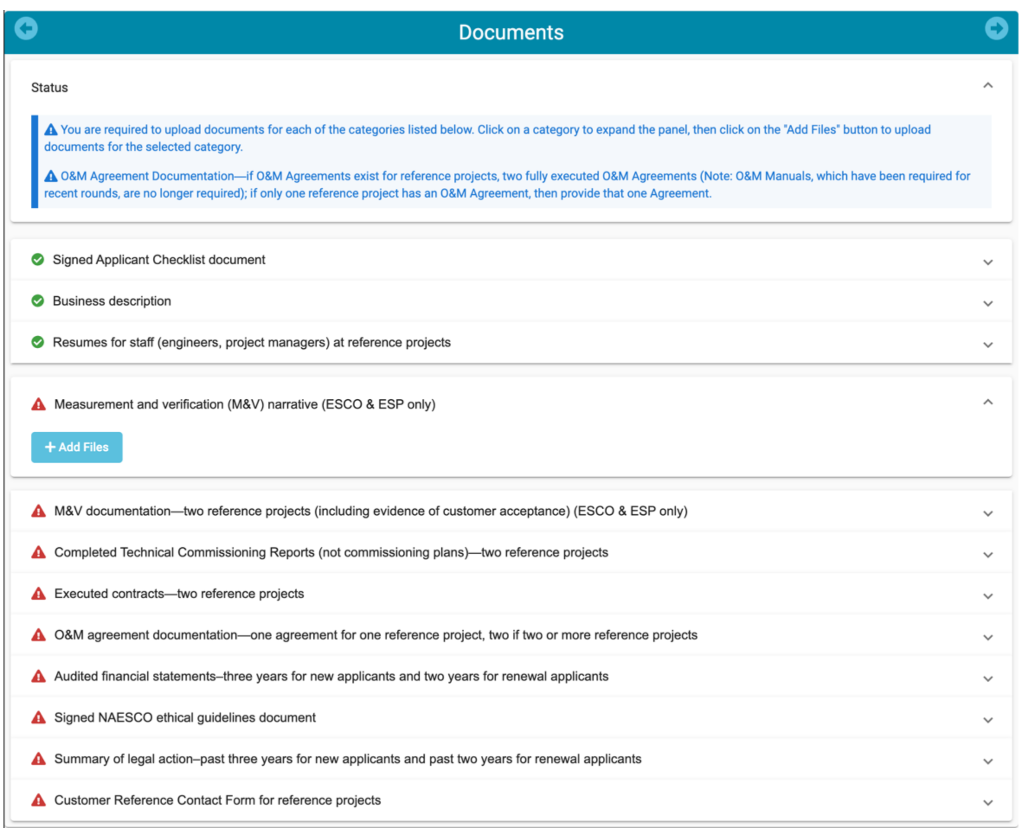
2. A popup box will appear that asks if your company has provided O&M services to at least one reference project (see figure below).



   a. If you respond "yes," you will be required to provide 2 fully executed O&M agreements in the "O&M Documentation" panel. If only one reference project has an O&M agreement, you must provide that one O&M agreement.
   b. If you respond "no," you will not be required to provide O&M agreements.

3. Click on a file category to expand the desired document panel.
4. Click the "+ Add Files" button to upload the relevant document file(s) from your computer.
5. Click the "Upload" button.

The panels each initially display a red warning symbol, which turns green once the necessary document(s) have been successfully uploaded (see figure below). You may upload multiple documents under each panel.



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Once all of the required documents have been uploaded, a message will appear indicating that your application documents are complete. For additional guidance on any of the documents required, reference the NAESCO Master File.

EEC applicants are now ready to submit their accreditation application. ESCO and ESP applicants are now ready to enter project data.

ATTENTION! Companies seeking EEC accreditation do not need to read beyond this section of this guide. Rather than complete the Projects section of the application, EEC applicants must upload the project summary spreadsheet to the "Documents" tab. For further information on completing an EEC application, reference the instructions for EECs in the downloadable package of instructions.

Completing the Projects Section (ESCO and ESP Applicants Only)

After completing the Documents section, navigate to the Projects section of your application by clicking the "Projects" tab or the righthand arrow. The number of projects required for your application can be found in Appendix A. The Projects section requires you to:

- Add projects to your application
- Enter project data by uploading the **non-calculating** template
- Add additional NAESCO-specific project information in the user interface in the "Additional Data" tab (see Appendix F for a list of these fields).
- Designate "reference" projects (**see blue box with important information below**)
- Add at least one year of measured and verified (M&V) savings data for each reference project

ATTENTION! Reference projects have additional requirements. Please review the below carefully before entering projects into ePB with the intention of designating them as reference projects.

Reference projects MUST:

- Have a project acceptance date that is within the eligible time frame.
  - For renewal applications, reference projects must have project acceptance date of less than 42 months prior to the start of the Accreditation cycle.
  - For new applications, reference projects must have project acceptance date of less than 60 months prior to the start of the Accreditation cycle.
- Have guaranteed energy savings and guaranteed energy cost savings.
- **NEW** Meet the requirement that at least 25% of the project implementation price (exclusive of financing) is for ECMs that have guaranteed savings and are measured and verified.
- **NEW** Meet the requirement that the dollar value of resource savings plus avoided third-party O&M costs equals or exceeds the dollar amount of the portion of the project that is financed.
- Have a minimum of one year of measurement and verification (M&V) data measured from the date of customer acceptance of the completed project.

The top of the projects section indicates the number of projects and reference projects required to complete your application, as well as the number of projects that are missing required data.

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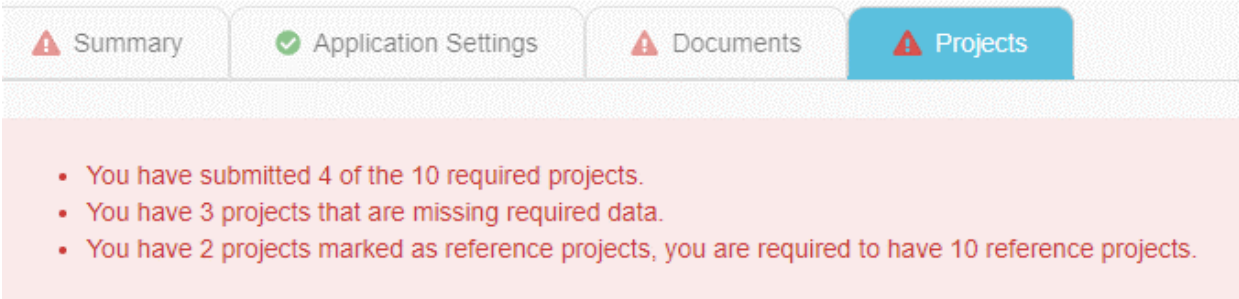


Adding Projects to an Accreditation Application

Users can create a new project for inclusion in an application OR add an existing project in ePB, so long as they are assigned as both the Project Initiator (PI) *and* the Project Builder (PB) on the existing project.

To create a new project for inclusion in your application:

1. Click the "+ New Project" button.
2. A window titled "Add New Project" will appear. Complete the blank fields by providing the project name, market segment, primary project location and zip code.
3. Click the "OK" button. Note that you will automatically be assigned to both the PI and PB roles for the project.
4. Once a project has been created, it will automatically be added to the main table on the Projects tab which lists the Projects included in your application; however you will automatically be directed to the first stage of entering project information, the Template Data page.

To mark an existing project in ePB for inclusion in your application:

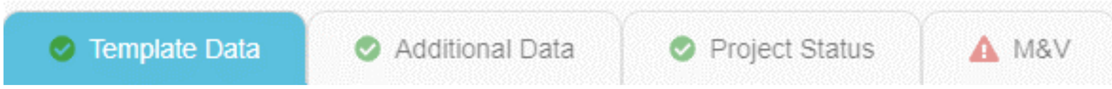
1. Click the "+ Existing Project" button.
2. A window titled "+ Existing Project" will appear. The table will contain all projects in ePB that you are assigned to as the Project Initiator (PI) and Project Builder (PB).
3. Click the checkbox to the left of the project name and click "OK."
4. The project will now be added to the Projects summary table.

Entering Project Data

To enter data for a project associated with your application, click the three dots under the "Action" column and select "Edit." There are four main steps to completing data for each project, each represented by a separate tab.

- **Template Data:** Download the non-calculating data template and populate with project data required by NAESCO. Then upload the template (see Appendices B through E for information about the required data fields).
- **Additional Data:** Enter additional project data required by NAESCO (see Appendix F for a list of the additional data fields).
- **Project Status:** Convert your project to "Approved" status.
- **M&V:** Enter annual M&V data. At least one year of M&V data is required for reference projects. Annual M&V data is optional for non-reference projects.

Information must be completed in the order listed above. For example, in order to advance to "Additional Accreditation Information," you must first successfully complete the "Template Data" step. Once a step is complete, the red "incomplete" icon turns to a green "complete" icon.



As steps are completed sequentially, proceed to the next step by clicking the next tab or the right-hand arrow. If at any point in time you wish to navigate back to a particular step in the application process you may do so by clicking the appropriate tab.

Completing Step 1: Template Data

1. Click the "Download blank non-calculating template link in the "Upload Data" section (or from the ePB Help & Documentation page). A version of the non-calculating template with the required fields color-coded is available for download on the "Template Data" tab within the Projects section of Accreditation.
2. Populate the **non-calculating** data template with the NAESCO-required fields. See Appendix B for images of the fields required (and their locations) in the non-calculating template. In Appendix B, the blue-shaded cells indicate the fields required for NAESCO accreditation; the yellow-shaded cells are optional. (See Appendix C for required fields for UESC projects, and Appendix D for required fields for direct-funded projects).
3. Once completed, save the template as an .xlsx file on your computer.
4. Click the "Upload Non-calculating Template" button, and then click the "Select a File" button. Choose the appropriate file from your computer and select "Upload".

- **Only the non-calculating template can be used to enter project data for NAESCO accreditation.** If you are populating a template for a project that you already have in ePB you may need to transfer the data into a non-calculating template for upload to the accreditation feature.
- Alternatively, for existing projects in ePB for which users entered data manually through the online system rather than through the data template, users may change their project to "non-calculating" mode on the Project Dashboard and enter missing data in the Edit Data screens (see the "Welcome to ePB 3.0" overview video or the general ePB User Guide on the ePB Help/Documentation page for more information).
- Do not enter "N/A" or similar language in fields that are intended for numerical values.
- Contact epb-support@lbl.gov for technical assistance with including existing ePB project in your accreditation application.

If the project template is not complete with all of the NAESCO-required fields, an error message displays. A table lists the missing field name and location in the template (both the schedule and the cell location).

Missing Template Fields

Section	Field Name	Reason	Location
Summary Schedule	Agency name	Value is missing	C18
Summary Schedule	Primary Electric Utility	Value is missing	C39
Summary Schedule	Primary Natural Gas Utility	Value is missing	C40

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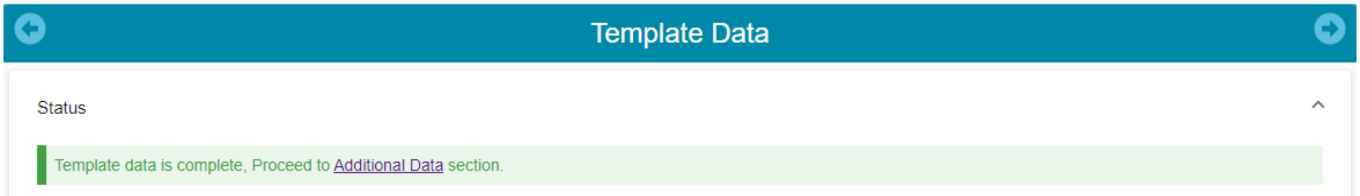
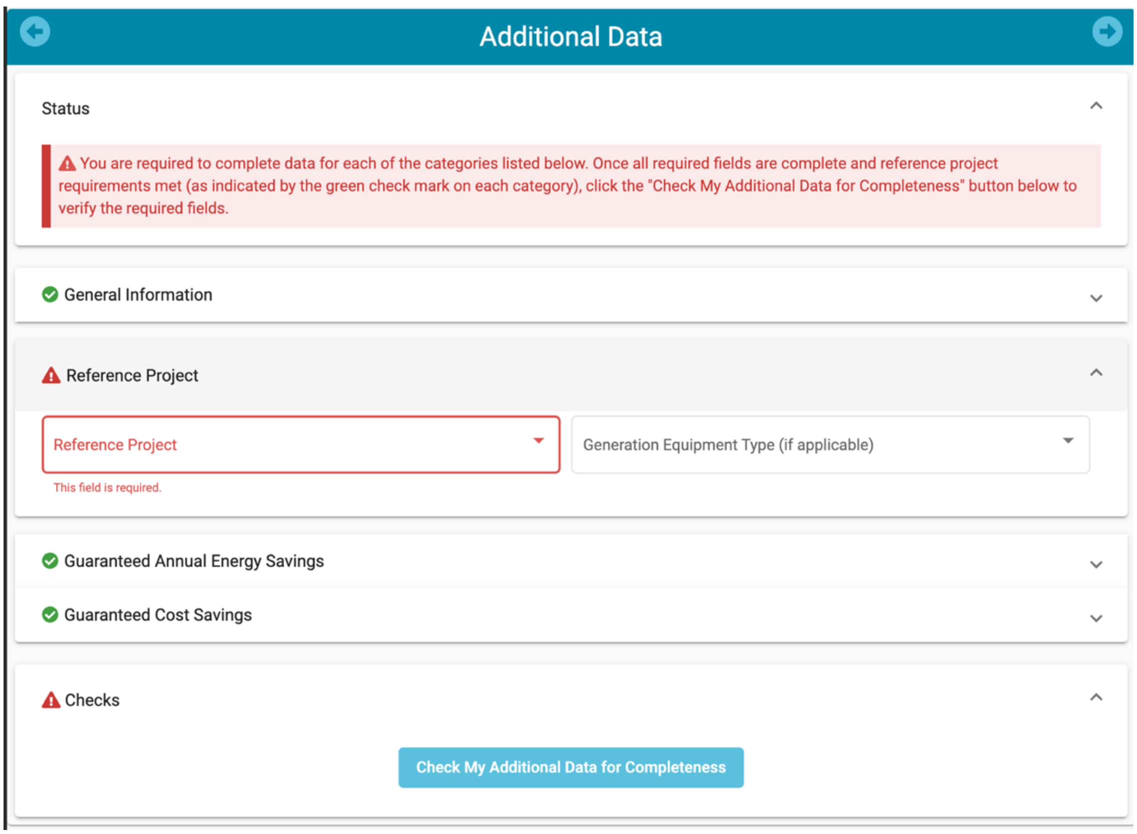
Complete any missing fields in your template and re-upload the template. Once successful, a message will appear indicating the template data is complete. To move on to the second step of the Projects section, click the "Additional Accreditation Information" link or tab, or the righthand arrow.



Completing Step 2: Additional Accreditation Information

The "Additional Data" tab is where you enter information required by NAESCO that is not included in the ePB template. This is also where you designate whether a project is a reference project.

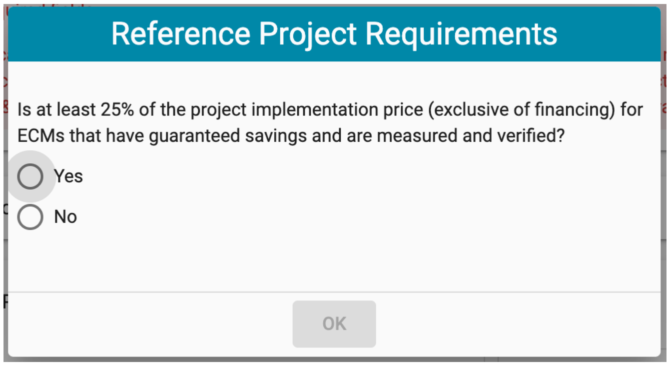
Click on a data category to expand the panel and view all required fields. Incomplete categories have a red incomplete indicator next to them.



Incomplete required fields appear with a red outline. Once the required data in each category has been completed, the red incomplete indicator turns to a green checkmark. For some data categories, only the applicable fields must be completed (e.g., for the Guaranteed Cost Savings, if there are no non-energy savings, those fields do not need to be completed). Guaranteed annual energy savings and guaranteed cost savings fields are required for reference projects but are optional for non-reference projects.

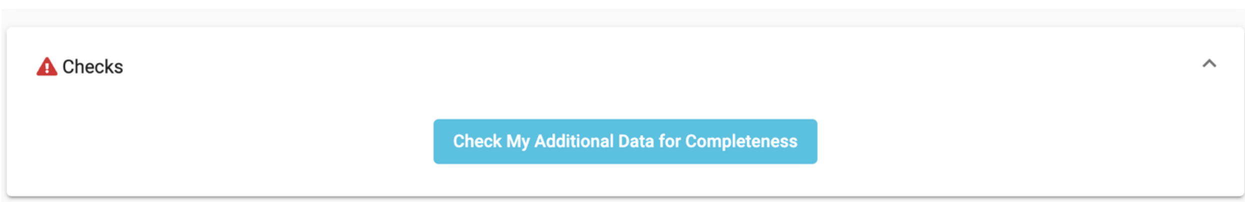
If you select that the project is a reference project, a popup box will appear asking if at least 25% of the project implementation price (exclusive of financing) is for ECMs that have guaranteed savings and are measured and verified.

- If yes, you will need to provide the relevant contract pages that show total contract costs, list of all ECMs, and the price of each.
- If no, the project cannot be a reference project and the reference project field will be automatically set to "no".



Additionally, for reference projects, the dollar value of resource savings plus avoided third-party O&M costs should equal or exceed the dollar amount of the portion of the project that is financed. The Additional Data tab will be considered incomplete for a reference project that does not meet this requirement.

At any point, you can check if the additional data entered meets all requirements by clicking on the "Check My Additional Data for Completeness" button in the "Checks" panel.

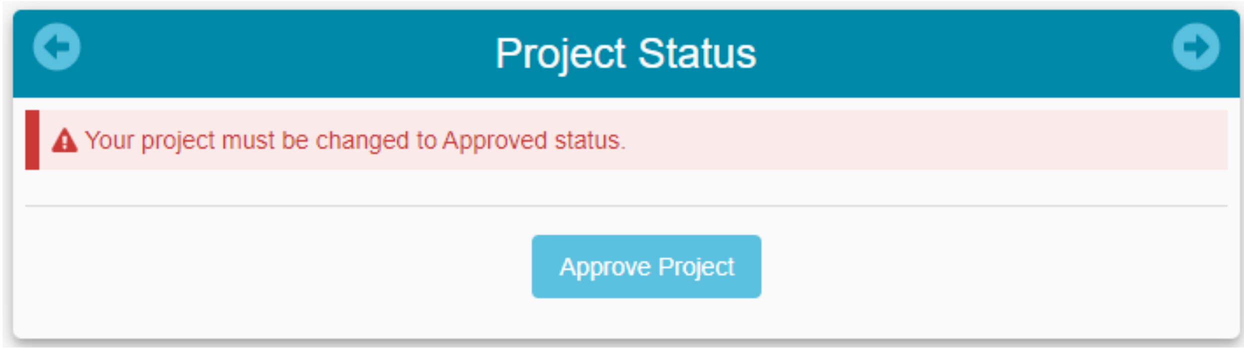


Once all the fields in the Additional Data tab have been completed (indicated when each category has a green checkmark), click on the "Check My Additional Data for Completeness" button to do a final check of requirements. Then proceed to "Project Status" by clicking the Project Status tab or the righthand arrow.

See Appendix F for a complete list of the required additional data fields.

Completing Step 3: Project Status

Completion of this step brings the project from "Pending" status to "Approved" status in ePB. Click the "Approve Project" button. Next, click the "M&V" tab or the righthand arrow to proceed to Step 4 of the Projects section.

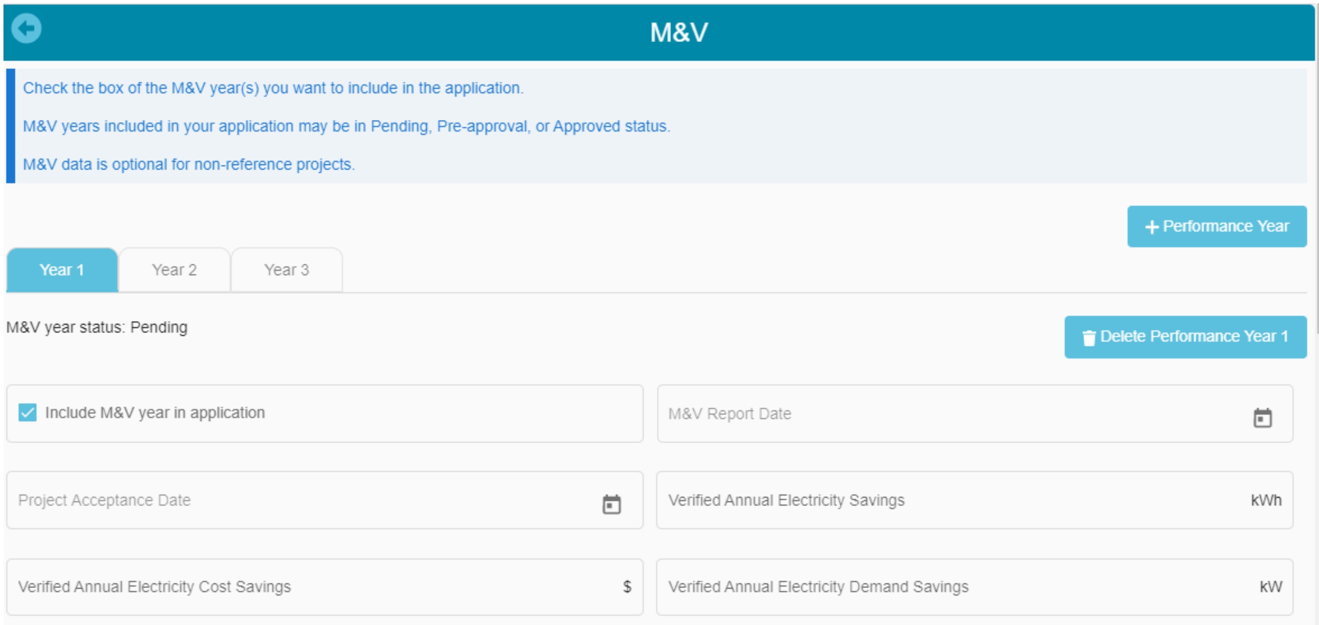


Completing Step 4: M&V

Reference projects require at least one year of M&V savings data. A quantity and costs savings pair (e.g. *annual water savings – kGal* and *annual water cost savings*) is required for each of the resource types that are relevant for a project as determined by the data template upload. M&V savings data is optional for non-reference projects.

To add M&V savings data:

1. Click the "+ Performance Year" button.
2. Designate the savings year from the drop down list.
3. Click the "OK" button. The field will appear as a tab (see screenshot below).
4. Complete all applicable fields (see figure below). Note that when you report resource savings for a particular resource (e.g. kWh of electricity or MMBtu of natural gas) you also need to report the corresponding dollar savings for that resource. Once the required data has been provided, the field outline will turn green.
5. Click the "Include M&V year in application" checkbox to include this M&V year in your application.



If the project was already an existing project in ePB that had M&V years entered in the M&V module, these years will appear in the M&V section of the Accreditation feature.

Once the relevant M&V fields have been completed, click the "Applications/Projects" link on the lefthand sidebar. You will now return to the list of projects that are included in your application. The project you just completed will now read "Approved" under the ePB Status column and "Complete" under the "Application Status" column.

- **IMPORTANT!** If the project was already an existing project in ePB that had M&V years entered in the M&V module, these years will appear automatically in the M&V section of the Accreditation feature. Users can edit M&V years that are in Pending status, but cannot edit M&V years that are in "Approved" status.
- M&V data may be in any status (Pending, Pre-approval or Approved) to be included in the Accreditation application.
- See Appendix E for a detailed description of all M&V fields.

To complete your application, repeat steps 1 through 4 listed above for as many projects are required for your application, as indicated on the Projects tab.

Submitting Your NAESCO Accreditation Application

The progress indicator on the lefthand sidebar will indicate when an application is 100% complete and ready for submission.

- **ESCO & ESP Applicants**: Once you have completed the Documents section (by uploading all required documents) and the Projects section (by adding the required number of projects to your application and completing all project data—including M&V data for reference projects), your application is ready to be submitted.

- **EEC Applicants:** Once you have completed the Documents section (by uploading all required documents, including the Project Summary Spreadsheet) — your application is ready to be submitted.

Click “Submit Application” on the lefthand sidebar. To confirm your application is submitted, click “Accreditation Home” on the lefthand sidebar. Your application should read “Submitted” under the “Status” column of the NAESCO Accreditation Applications table.

Editing or Unlocking Your NAESCO Accreditation Application

You may return to your in-progress application as needed. To return to an in-progress application, return to the accreditation feature. Click the three dots under the action menu and click “edit” next to the application you wish to edit.

If you need to make changes to a **submitted** NAESCO Accreditation Application, the application must first be unlocked. Click the three dots under the action menu and click “edit” next to the application you wish to edit. You will be taken to the Summary page for that application. Once there, click “Unlock Application” on the lefthand sidebar. Your request will be submitted to an ePB administrator, who will unlock your request.

Appendix A. Number of Projects Required

Applicant Organization Type	New Application	Renewal Application
ESCO	• Upload data on ALL projects completed over past five years (60 calendar months) up to a maximum of 25 projects. • 10 of the above projects, with at least one year of annual M&V data must be marked as "Reference" Projects.	• Upload data on 30% of projects completed over the past 3.5 years 42 calendar months). Minimum requirement of 10, maximum requirement of 15. • Five of the above projects, with at least one year of M&V data, must be marked as "Reference" Projects.
ESP	• Upload data on ALL projects completed over past five years (60 calendar months) up to a maximum of 25 projects. • 10 of the above projects, with at least one year of annual M&V data must be marked as "Reference" Projects.	• Upload data on 30% of projects completed over the past 3.5 years (42 calendar months). • Minimum of 10, maximum of 15. Five of the above projects must be marked as "Reference" Projects.
EEC	• Project data must be provided via the EEC "Project Summary" Spreadsheet and uploaded through the Documents page of the accreditation module. See this guide for further instructions.	• Project data must be provided via the EEC "Project Summary" Spreadsheet and uploaded through the Documents page of the accreditation module. See this guide for further instructions.

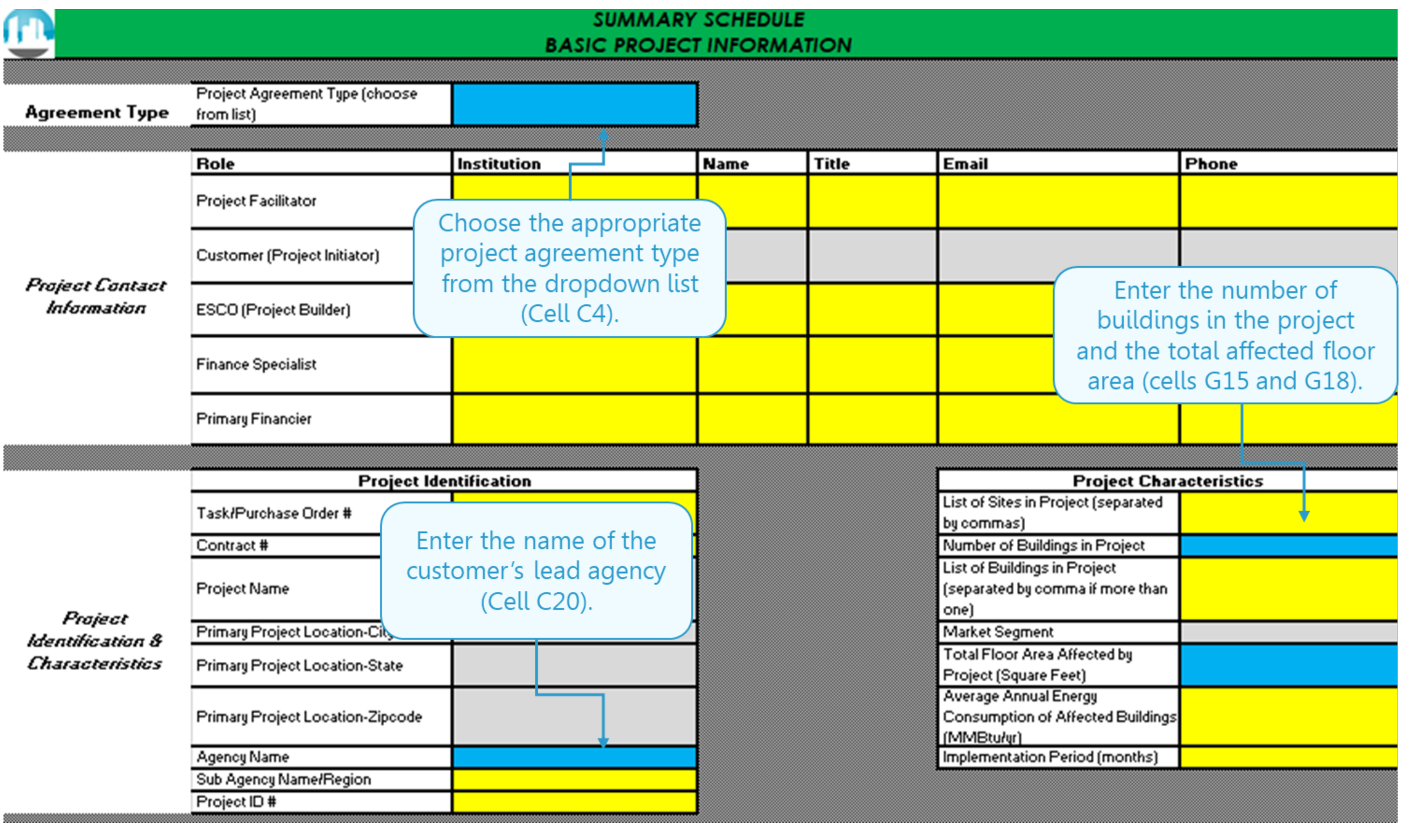
ATTENTION! For renewal applications, reference projects must have project acceptance date of less than 42 months prior to date of application submission. For new applications, reference project must have project acceptance date of less than 60 months.

Appendix B. Fields Required in ePB Non-Calculating Template for NAESCO Accreditation

The figures below indicate the fields required to be completed in the ePB non-calculating template for a NAESCO Accreditation Application. **Fields required to be completed for NAESCO accreditation are shaded in blue.** The yellow shaded fields as shown below are optional. Users may enter additional information as desired into the yellow shaded fields.

NOTE: Please see Appendix C for required fields for direct-funded projects in Accreditation, and Appendix D for required fields for UESC projects in Accreditation.

Summary Schedule



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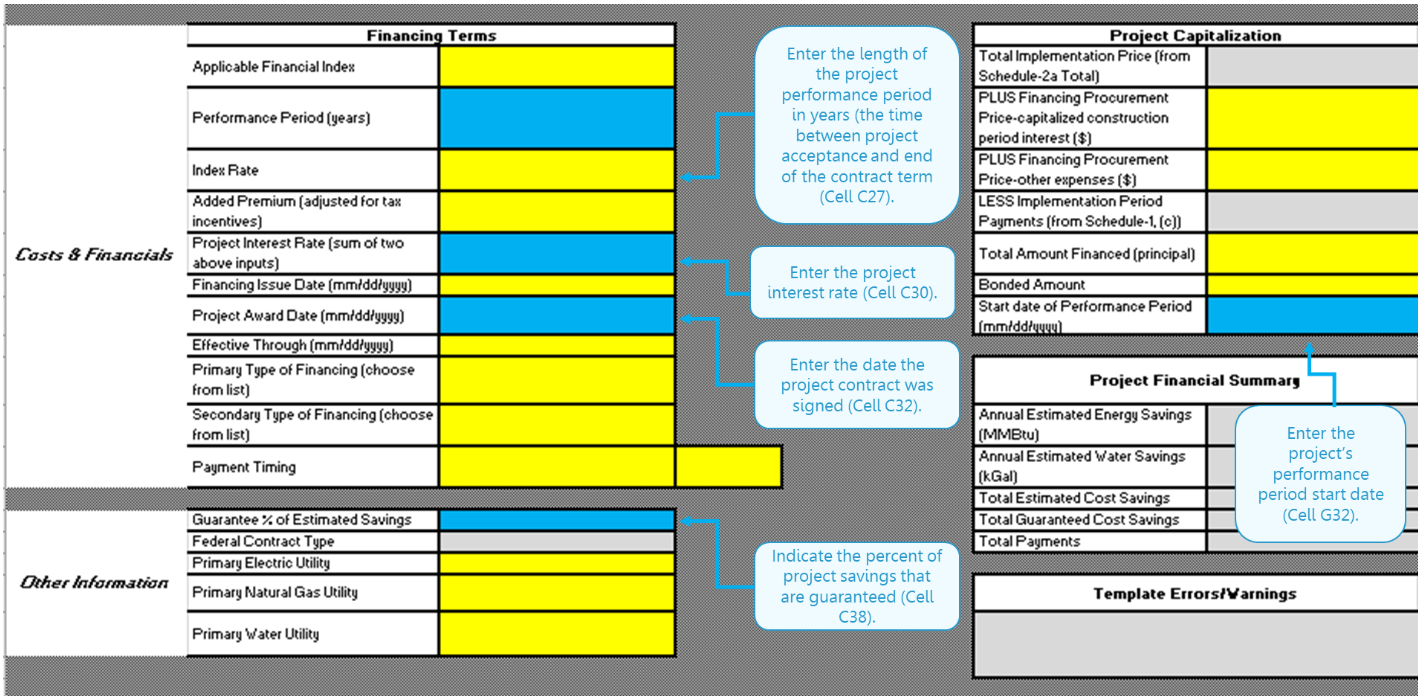
Summary Schedule (cont'd.)



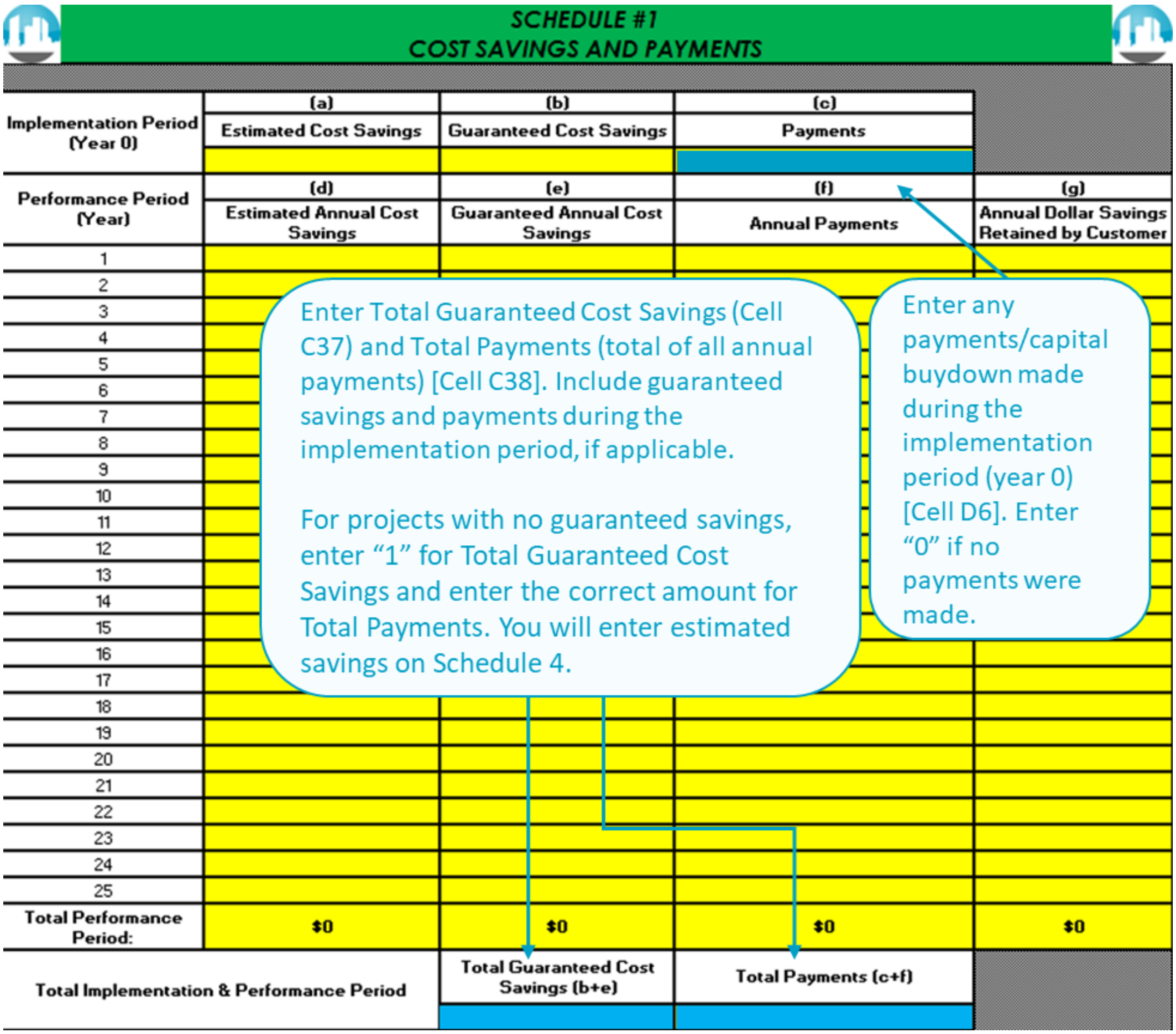
Annual Escalation Rates – Indicating Other Fuel/Savings Types

ANNUAL DOLLAR SAVINGS ESCALATION RATES

Performance Period (year)	Electric Energy	Electric Demand	Natural Gas	Other Savings Type 1: Other	Other Savings Type 2: Other	Water	O&M	Other Non-energy Savings
Implementation start through first year								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								

If your project has resource savings types other than electricity, demand, natural gas or water, you must choose the resource type(s) in the dropdown boxes, as applicable. Note that you are not required to fill in any escalation rate values in this Escalation Rates Schedule.

Schedule 1 – Annual Cost Savings & Payments



SCHEDULE #1
COST SAVINGS AND PAYMENTS

Implementation Period (Year 0)	(a) Estimated Cost Savings	(b) Guaranteed Cost Savings	(c) Payments	
Performance Period (Year)	(d) Estimated Annual Cost Savings	(e) Guaranteed Annual Cost Savings	(f) Annual Payments	(g) Annual Dollar Savings Retained by Customer
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				
Total Performance Period:	$0	$0	$0	$0
Total Implementation & Performance Period		Total Guaranteed Cost Savings (b+e)	Total Payments (c+f)	

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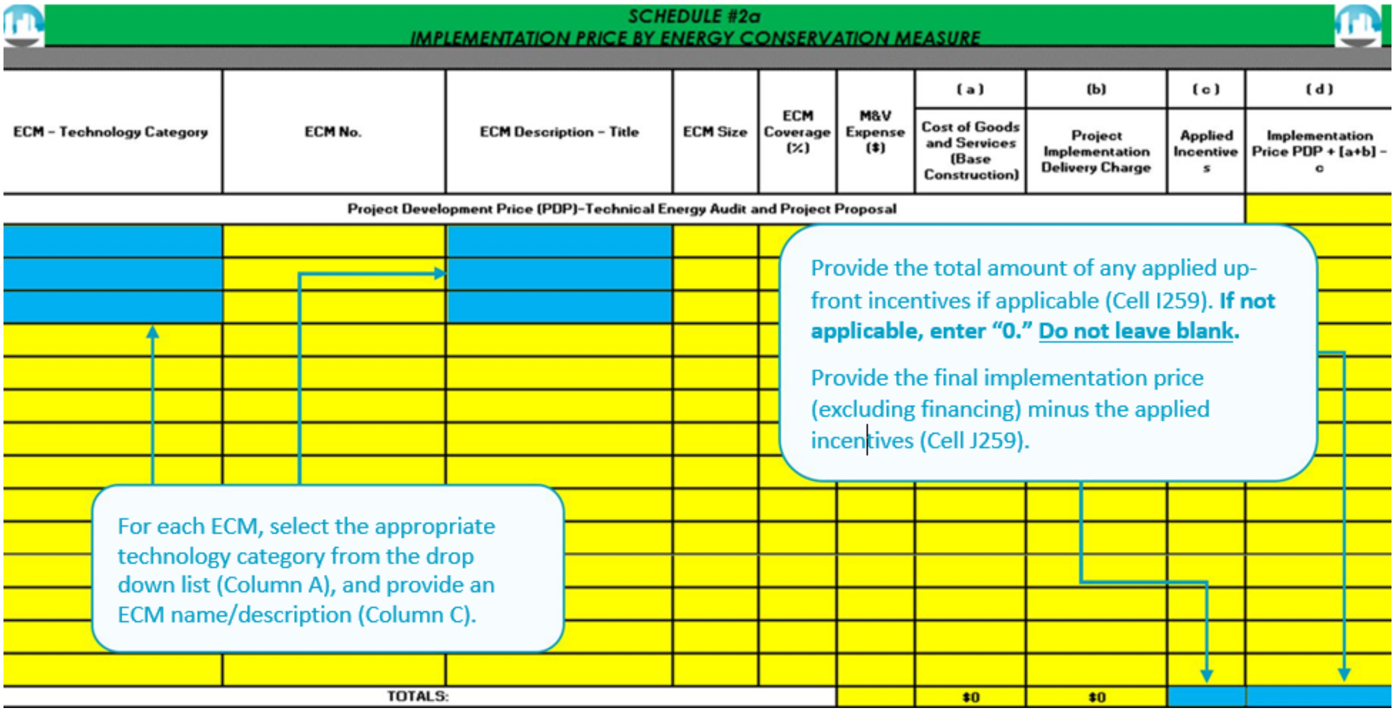
Schedule 2a – Implementation Price by ECM



Note that Schedule 2b is not required or used for NAESCO accreditation. You may skip Schedule 2b and move on to Schedule 3.

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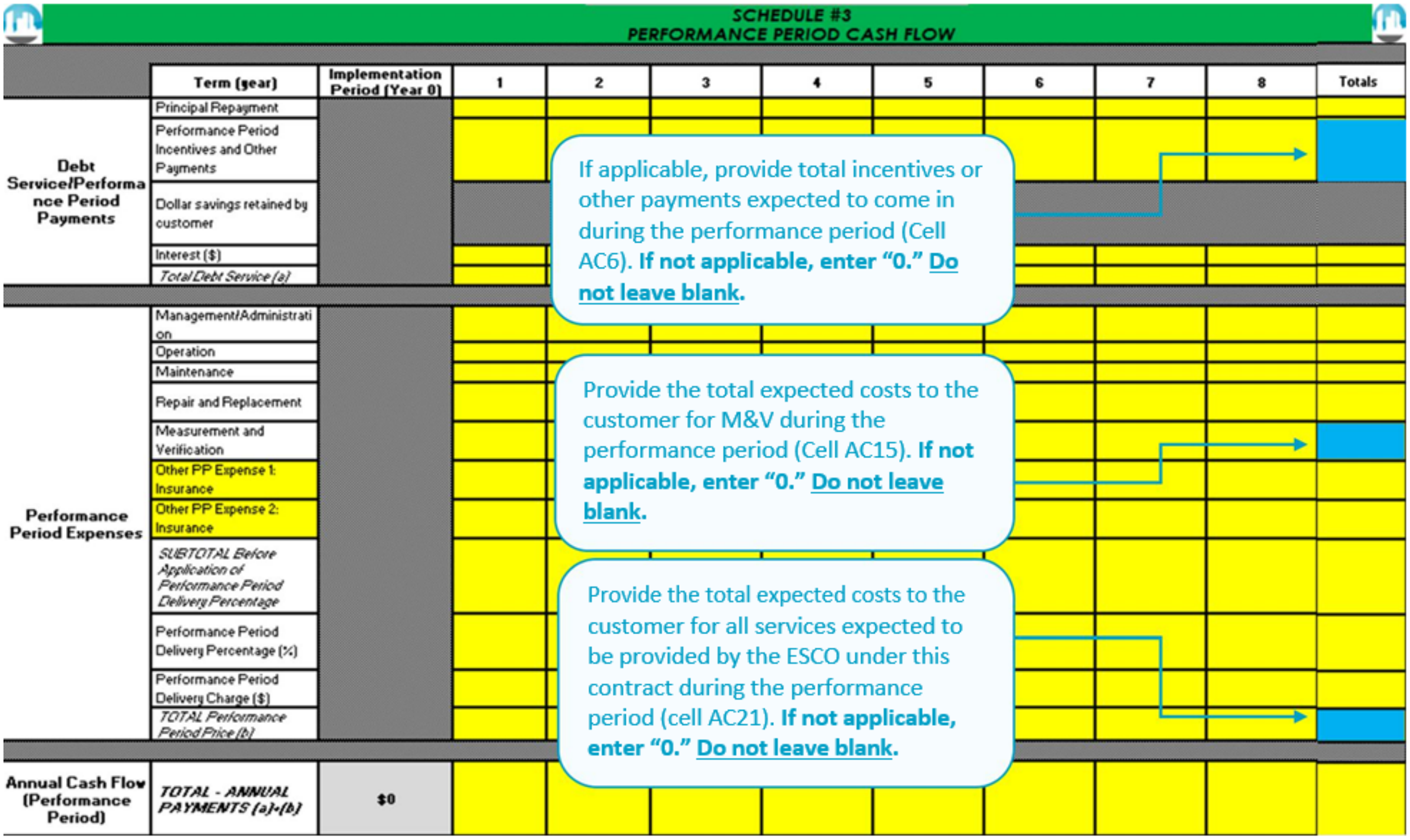
Schedule 3 – Performance Period Cash Flow



*Note that years 9-25 of the performance period cash flow spreadsheet are omitted from this image for space reasons

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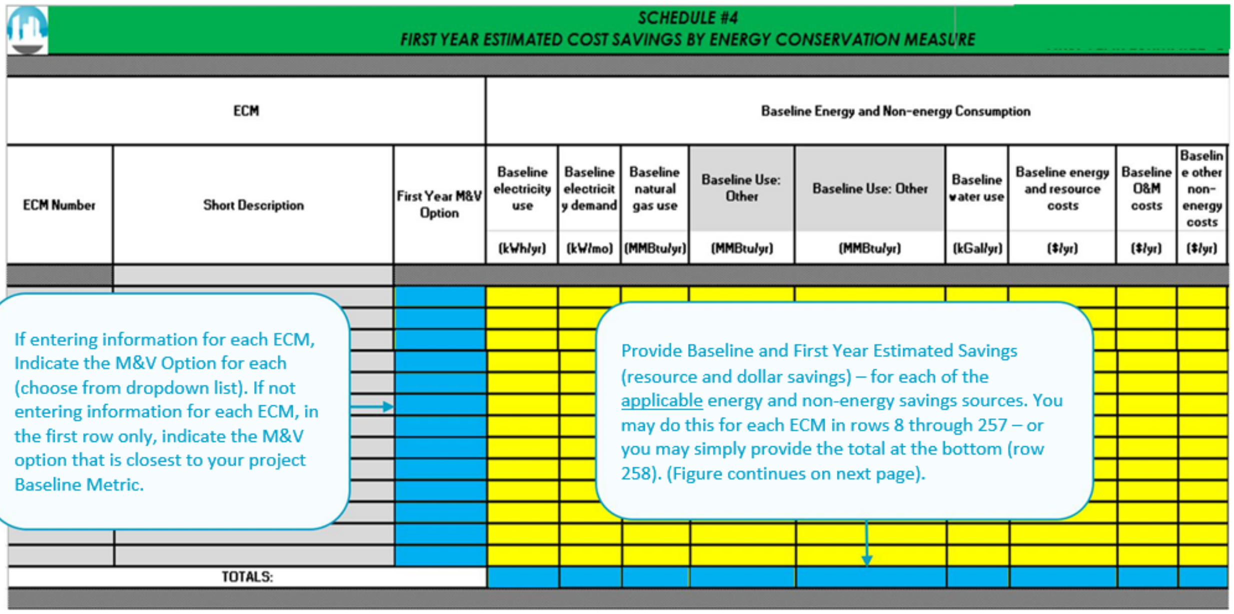
Schedule 4 – Baseline and Cost Savings by ECM



Schedule 4 – Baseline and Cost Savings by ECM (cont'd.)

SCHEDULE #4
FIRST YEAR ESTIMATED COST SAVINGS BY ENERGY CONSERVATION MEASURE

b1	b2	c1	c2	d1	d2	e1a	e2a	e1b	e2b	f = 0.003412*b1+d1+e1a+e1b	g = b2+c2+d2+e2a+e2b	h	i	j	k	l = g+i+j+k	m	n = m/l
Electric energy savings	Electric energy savings	Electric demand savings	Electric demand savings	Natural gas savings	Natural gas savings	Other Savings Type 1: Other	Other Savings Type 1: Other	Other Savings Type 2: Other	Other Savings Type 2: Other	Total energy savings	Total energy cost savings	Water savings	Water savings	O&M cost savings	Other non-energy cost savings	Estimated annual cost savings	Implementation price	Simple Payback
(kWh/yr)	($/yr)	(kW/mo)	($/yr)	(MMBtu/yr)	($/yr)	(MMBtu/yr)	($/yr)	(MMBtu/yr)	($/yr)	(MMBtu/yr)	($/yr)	(Kgal/yr)	($/yr)	($/yr)	($/yr)	($/yr)	($)	(years)
																	$0	
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
																$0	$0	

Indicate average monthly demand savings in kW/mo (cell P258) NOT annual savings.

Make sure there is an accurate value for cell Y258.

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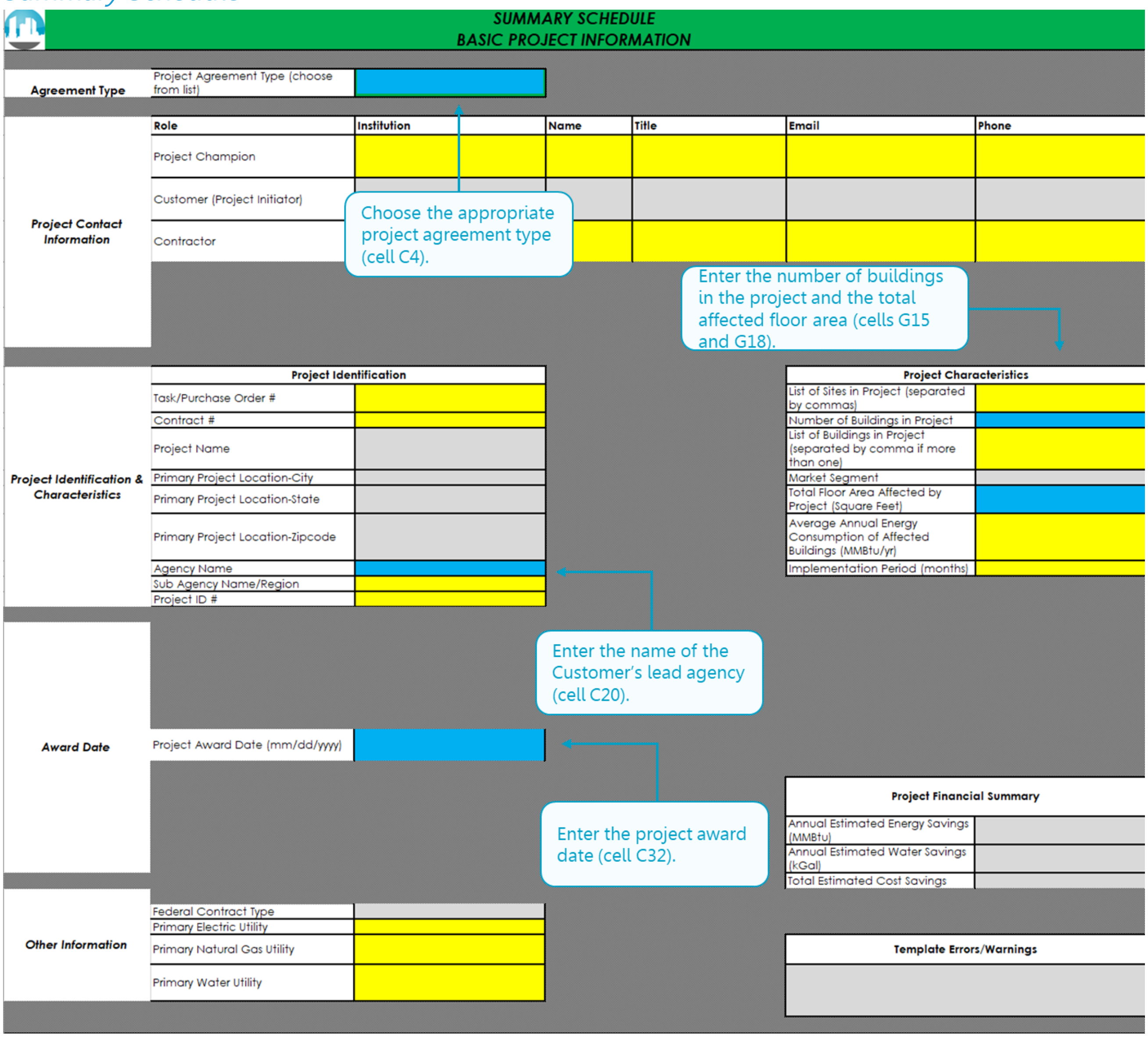
Appendix C. Required fields for direct-funded projects

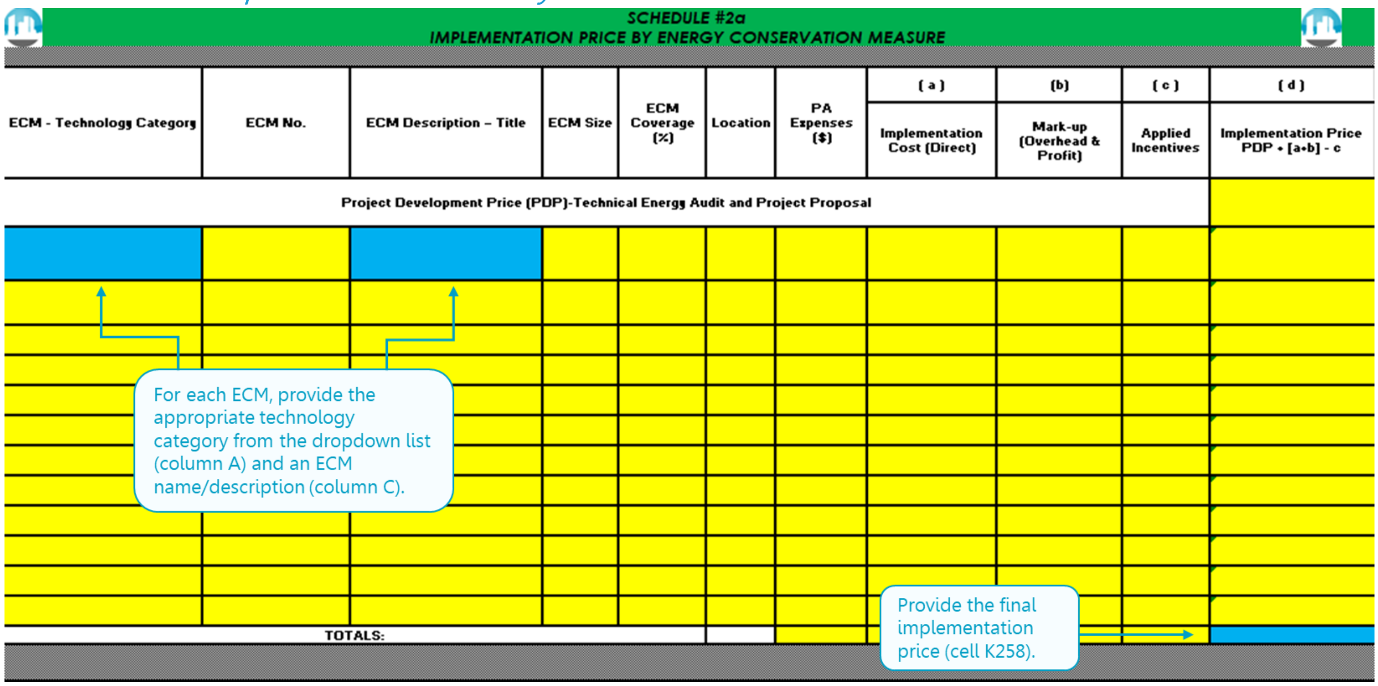
The figures below indicate the fields required to be completed in the ePB non-calculating template for a direct-funded project in a NAESCO Accreditation Application. **Required fields for NAESCO accreditation are shaded in blue in the screenshots below.** The yellow shaded fields as shown below are optional. Users may enter additional information as desired into the yellow shaded fields.

Note that not all of the Additional Data fields as outlined in Appendix E are available/required.

Summary Schedule



Schedule 2a – Implementation Price by ECM



Schedule 4 – Cost Savings by ECM

FIRST YEAR ESTIM

ECM			Baseline Energy and Non-energy Consumption									
ECM Number	Short Description	M&V Option	Baseline electricity use (kWh/yr)	Baseline electricity demand (kW/mo)	Baseline natural gas use (MMBtu/yr)	Baseline Use 1: Other (MMBtu/yr)	Baseline Use 2: Other (MMBtu/yr)	Baseline water use (kGal/yr)	Baseline energy and resource costs ($/yr)	Baseline O&M costs ($/yr)	Baseline other non-energy costs ($/yr)	Type of other non-energy costs
TOTALS:												

Provide Baseline and First Year Estimated Savings (resource and dollar savings) – for each of the applicable energy and non-energy savings sources. You may do this for each ECM in rows 8 through 257- or you may simply provide the total at the bottom (row 258). Figure continues on next page.

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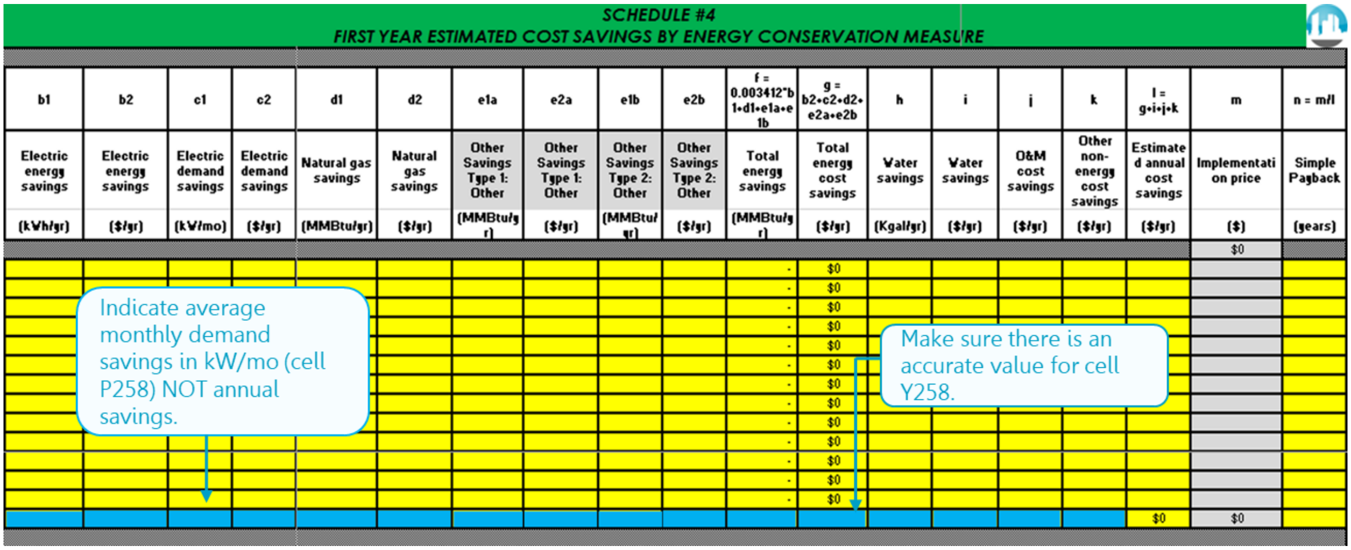
Schedule 4 – Cost Savings by ECM (cont'd.)



SCHEDULE #4
FIRST YEAR ESTIMATED COST SAVINGS BY ENERGY CONSERVATION MEASURE

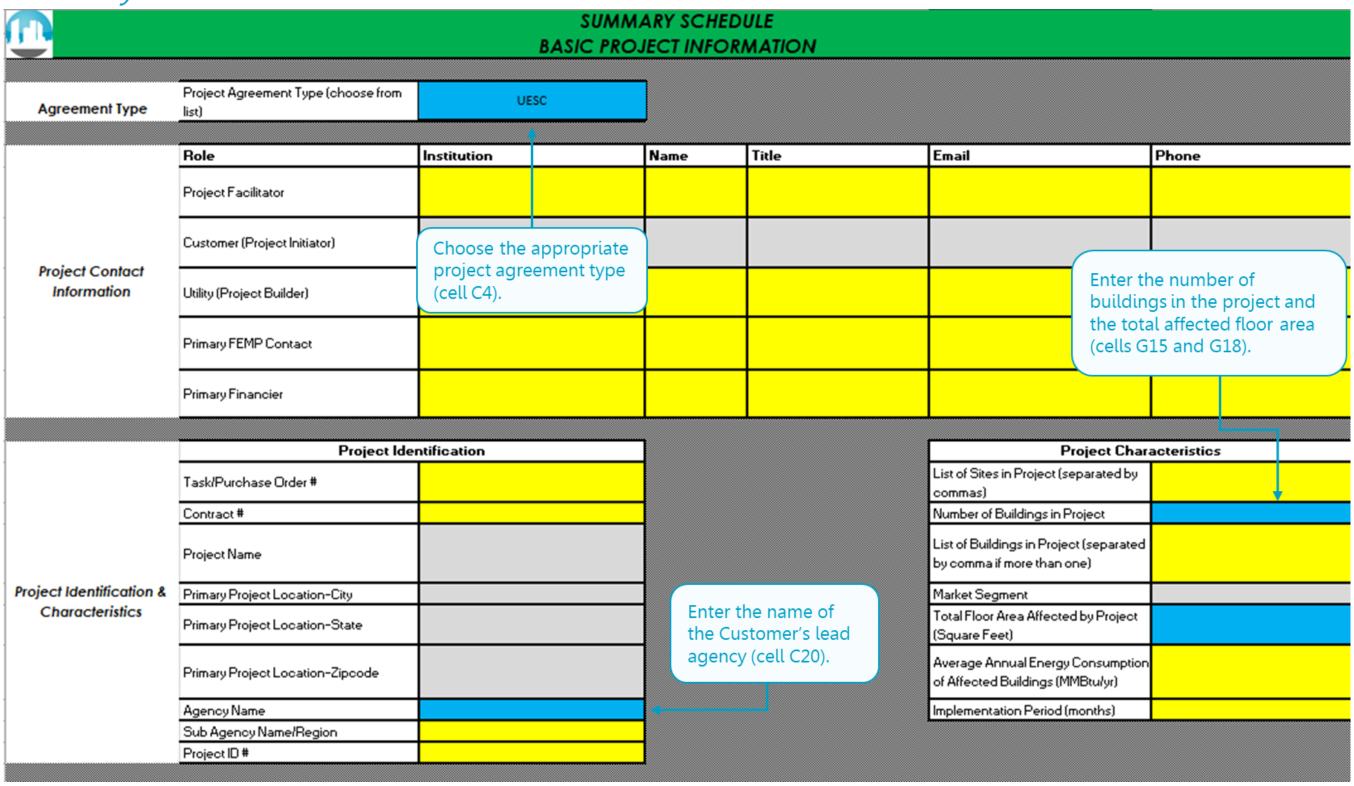
b1	b2	c1	c2	d1	d2	e1a	e2a	e1b	e2b	f = 0.003412*b1+d1+e1a+e1b	g = b2+c2+d2+e2a+e2b	h	i	j	k	l = g+i+j+k	m	n = m/l
Electric energy savings	Electric energy savings	Electric demand savings	Electric demand savings	Natural gas savings	Natural gas savings	Other Savings Type 1: Other	Other Savings Type 1: Other	Other Savings Type 2: Other	Other Savings Type 2: Other	Total energy savings	Total energy cost savings	Water savings	Water savings	O&M cost savings	Other non-energy cost savings	Estimated annual cost savings	Implementation price	Simple Payback
(kWh/yr)	($/yr)	(kW/mo)	($/yr)	(MMBtu/yr)	($/yr)	(MMBtu/yr)	($/yr)	(MMBtu/yr)	($/yr)	(MMBtu/yr)	($/yr)	(Kgal/yr)	($/yr)	($/yr)	($/yr)	($/yr)	($)	(years)
																	$0	
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
																$0	$0	

Appendix D. Required fields for UESC projects

The figures below indicate the fields required to be completed in the ePB non-calculating template for a UESC project in a NAESCO Accreditation Application. **Required fields for NAESCO accreditation are shaded in blue in the screenshots below.** The yellow shaded fields as shown below are optional. Users may enter additional information as desired into the yellow shaded fields.

Note that not all of the Additional Data fields as outlined in Appendix E are available/required.

Summary Schedule



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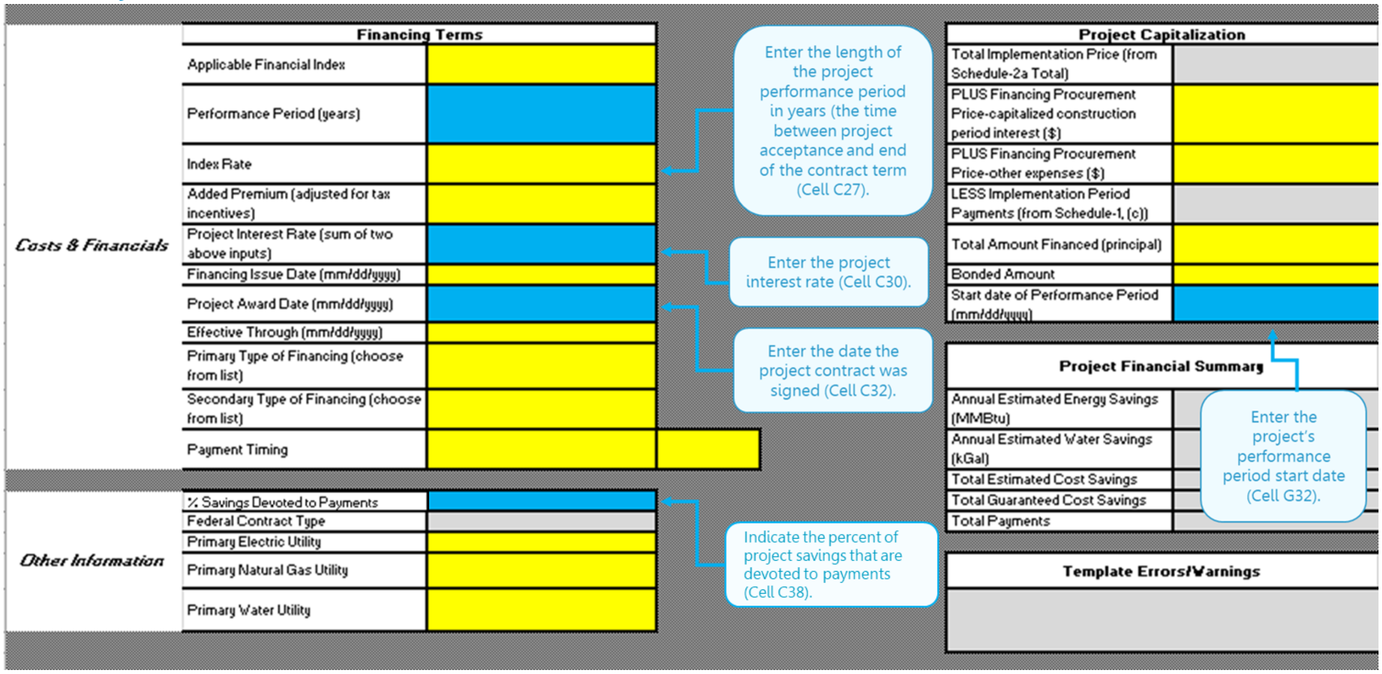
Summary Schedule – cont'd.



Schedule 1 – Annual Cost Savings & Payments

SCHEDULE #1(u)- UESC
COST SAVINGS AND PAYMENTS

Implementation Period (Year 0)	(a) Estimated Cost Savings	(c) Payments	
Performance Period (Year)	(d) Estimated Annual Cost Savings	(f) Annual Payments	(g) Annual Dollar Savings Retained by Customer
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
Total Performance Period:			
Total Implementation & Performance Period		Total Payments (c+f)	

Enter any payments/capital buydown made during the implementation period (year 0) [Cell D6]. Enter “0” if no payments were made.

Enter total payments (cell C37).

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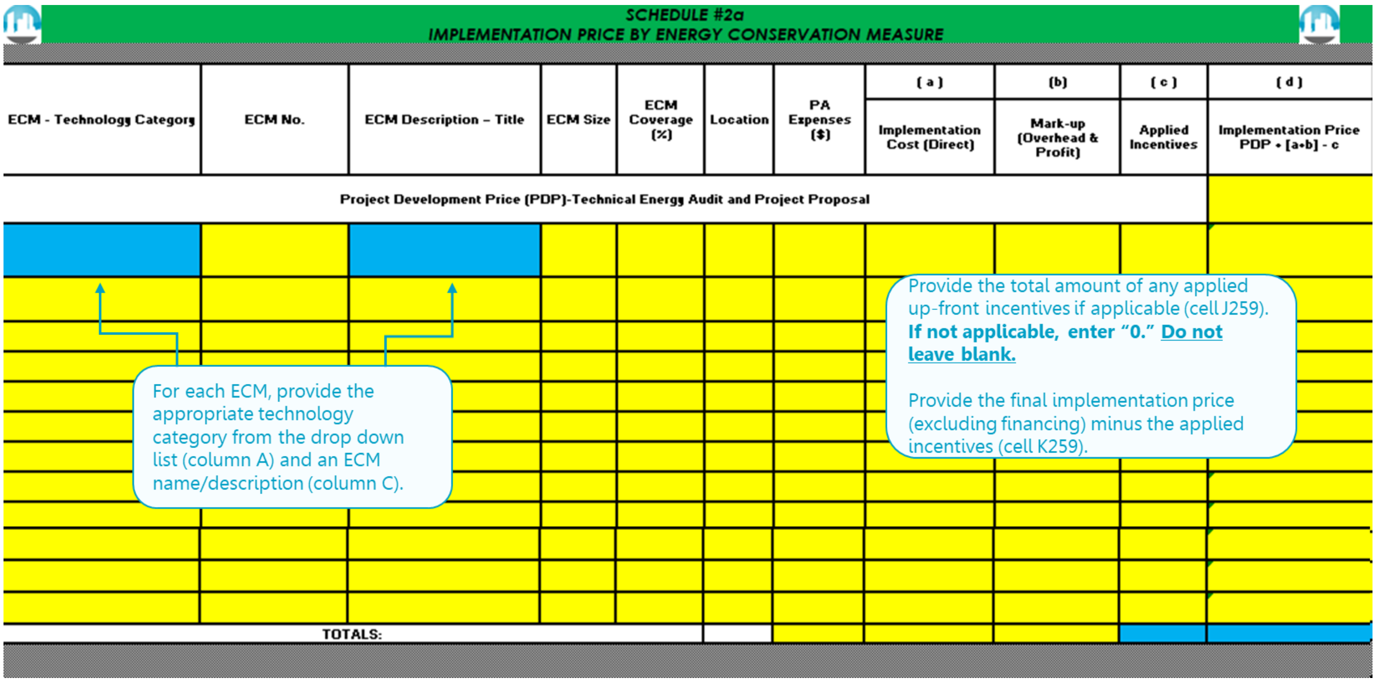
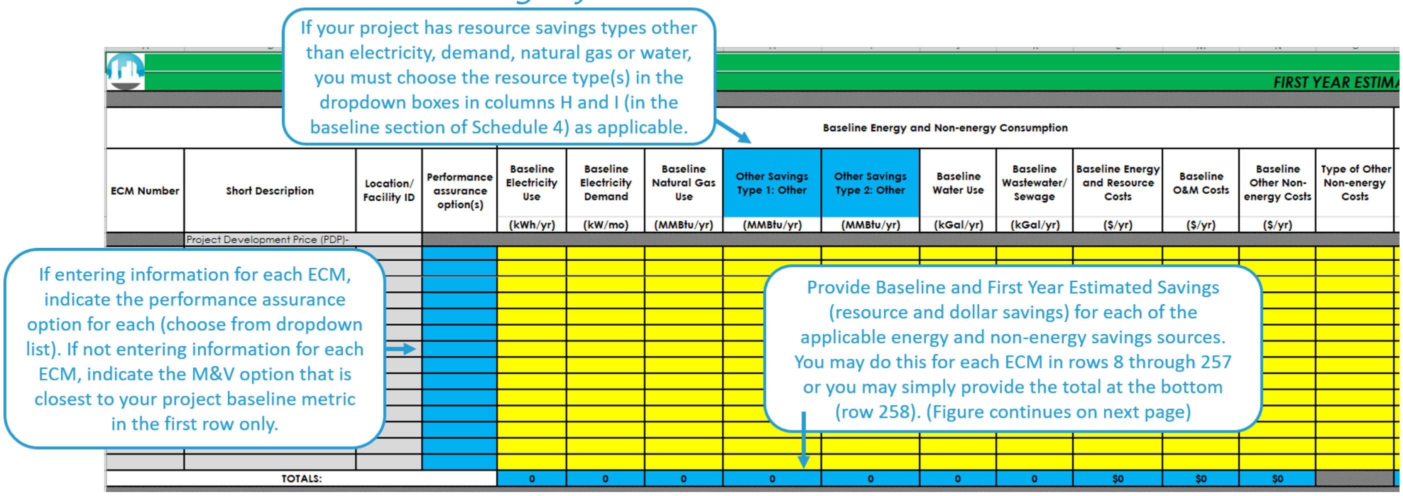
Schedule 2a – Implementation Price by ECM



SCHEDULE #2a
IMPLEMENTATION PRICE BY ENERGY CONSERVATION MEASURE

ECM - Technology Category	ECM No.	ECM Description – Title	ECM Size	ECM Coverage (%)	Location	PA Expenses ($)	(a) Implementation Cost (Direct)	(b) Mark-up (Overhead & Profit)	(c) Applied Incentives	(d) Implementation Price PDP + [a+b] - c
Project Development Price (PDP)-Technical Energy Audit and Project Proposal										
TOTALS:										

Schedule 4– Baseline and Cost Savings by ECM



Schedule 4– Baseline and Cost Savings by ECM (cont'd.)

SCHEDULE #4
FIRST YEAR ESTIMATED COST SAVINGS BY ENERGY CONSERVATION MEASURE

b1	b2	c1	c2	d1	d2	e1a	e2a	e1b	e2b	f = 0.003412*b1+d1+e1a+e1b	g = b2+c2+d2+e2a+e2b	h	i	j	k	l = g+i+j+k	m	n = m/l
Electric energy savings	Electric energy savings	Electric demand savings	Electric demand savings	Natural gas savings	Natural gas savings	Other Savings Type 1: Other	Other Savings Type 1: Other	Other Savings Type 2: Other	Other Savings Type 2: Other	Total energy savings	Total energy cost savings	Water savings	Water savings	O&M cost savings	Other non-energy cost savings	Estimated annual cost savings	Implementation price	Simple Payback
(kWh/yr)	($/yr)	(kW/mo)	($/yr)	(MMBtu/yr)	($/yr)	(MMBtu/yr)	($/yr)	(MMBtu/yr)	($/yr)	(MMBtu/yr)	($/yr)	(Kgal/yr)	($/yr)	($/yr)	($/yr)	($/yr)	($)	(years)
																	$0	
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
										-	$0							
																$0	$0	

Indicate average monthly demand savings in kW/mo (cell P258) NOT annual savings.

Make sure there is an accurate value for cell Y258.

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Appendix E. List of all required NAESCO fields

ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
1	Project agreement type	Project agreement type (choose from list).	Project	Required	Data Template	Summary Schedule	C4
2	Agency name	The lead agency name for the customer (e.g., a federal cabinet agency, a state, city, county or school district)	Project	Required	Data Template	Summary Schedule	C20
3	Total Floor Area Affected by project (Square Feet)	Floor area affected by project (square feet)	Project	Required	Data Template	Summary Schedule	G18
4	Number of buildings in Project	Number of buildings affected by the retrofit.	Project	Required	Data Template	Summary Schedule	G15
5	Performance Period (years)	The time from project acceptance after construction is complete to the end of the contract term.	Project	Required	Data Template	Summary Schedule	C27
6	Project Award Date	Date of project contract signing	Project	Required	Data Template	Summary Schedule	C32
7	Project Interest Rate	Project financing interest rate	Project	Required	Data Template	Summary Schedule	C30
8	Guarantee % of Estimated Savings	Guarantee percentage of estimated savings (%).	Project	Required	Data Template	Summary Schedule	C38
9	Start date of Performance Period	The project performance period's start date.	Project	Required	Data Template	Summary Schedule	G32
10	Total of Project Payments (project cost with financing)	Project cost including financing: total value of project payments (principal plus interest).	Project	Required	Data Template	Schedule 1	D37
11	Total Guaranteed Cost Savings	Total guaranteed dollar equivalent of resource savings for the project contract term INCLUDING O&M and other non-energy resource savings over the term of the contract ($).	Project	Required	Data Template	Schedule 1	C37

ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
87	Payments (Year Zero)	Payments/capital buydown made during the implementation period (year 0). Enter "0" if not applicable.	Project	Required	Data Template	Schedule 1	D6 (Cell C6 for UESC)
12	Other Savings Type 1	Choose from dropdown list of other resource types, if applicable -- the resource type will automatically populate into Schedule 4	Project	Applicable if project includes resource savings other than electricity, demand, natural gas and water	Data Template	Annual Escalation Rates Schedule	E4
13	Other Savings Type 2	Choose from dropdown list of other resource types, if applicable -- the resource type will automatically populate into Schedule 4	Project	Applicable if project includes resource savings other than electricity, demand, natural gas and water	Data Template	Annual Escalation Rates Schedule	F4
14	ECM Description-Title	Text description of ECM.	ECM	Required	Data Template	Schedule 2a	C9-C258
15	ECM Technology Category	Text Field for ECM category (choose from dropdown list).	ECM	Required	Data Template	Schedule 2a	A9-A258
16	Up-front DSM and Other Incentives	Incentives (e.g., DSM rebates, grants, tax incentives) that were applied to reduce the project's implementation price (and thus the amount financed).	ECM	Required	Data Template	Schedule 2a	I259
17	Total Project Implementation Cost (excl. financing)	Total project implementation cost - excluding financing and interest payments ($).	Project	Required	Data Template	Schedule 2a	J259
18	Total Customer Payments for Additional Services	Total of annual customer payments for ESCO services provided during the performance period (the period from customer acceptance through the end of the contract term).	Project	Required	Data Template	Schedule 3	AC21
19	TOTAL M&V - Performance Period Customer Cost	Total cost to customer for M&V during the performance period/contract term ($).	Project	Required	Data Template	Schedule 3	AC15

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ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
20	Total of DSM and Other Incentives Received During Performance Period	Total of Incentives (e.g., DSM rebates, grants, tax incentives) received annually or periodically during the performance period (excludes up-front incentives)	Project	Required	Data Template	Schedule 3	AC6
21	First Year M&V Option	M&V option that is closest to project baseline metric (choose from list).	ECM	If entering ECM-level information, M&V Option is required for each. If entering only project-level M&V option (cell 257) choose the option that best represents the baseline metric.	Data Template	Schedule 4	C8-C257
22	Baseline-Electricity use (kWh)	Annual baseline electricity usage (kWh).	Project	At least one of these Baseline fields (field IDs 22-30) is required	Data Template	Schedule 4	D258
23	Baseline-Electricity demand (kW)	Annual baseline electric demand (kW) - an annual figure calculated by multiplying the average monthly kW baseline by 12	Project	At least one of these Baseline fields (field IDs 22-30) is required	Data Template	Schedule 4	E258
24	Baseline-Natural gas use (MMBtu)	Annual baseline natural gas usage (MMBtu).	Project	At least one of these Baseline fields (field IDs 22-30) is required	Data Template	Schedule 4	F258
25	Baseline use-Other Type 1 (MMBtu)	Annual baseline usage for other resource type 1 (MMBtu). Other resource types are selected in the Escalation Rates Schedule and automatically populate the resource type in Schedule 4	Project	At least one of these Baseline fields (field IDs 22-30) is required	Data Template	Schedule 4	G258
26	Baseline use-Other Type 2 (MMBtu)	Annual baseline usage for other resource type 2 (MMBtu). Other resource types are selected in the Escalation Rates Schedule and automatically populate	Project	At least one of these Baseline fields (field IDs 22-30) is required.	Data Template	Schedule 4	H258

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ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
		the resource type in Schedule 4					
27	Baseline-Water use (kgal)	Annual baseline water usage (kGal)	Project	At least one of these Baseline fields (field IDs 22-30) is required	Data Template	Schedule 4	I258
28	Baseline-Energy and resource use ($)	Annual baseline dollar equivalent of resource savings for the year NOT including O&M and other non-energy resource savings ($)	Project	At least one of these Baseline fields (field IDs 22-30) is required	Data Template	Schedule 4	J258
29	Baseline-O&M costs ($)	Annual baseline O&M costs ($)	Project	At least one of these Baseline fields (field IDs 22-30) is required	Data Template	Schedule 4	K258
30	Baseline-Other non-energy costs ($)	Annual baseline - other non-energy costs ($)	Project	At least one of these Baseline fields (field IDs 22-30) is required	Data Template	Schedule 4	L258
31	Estimated annual savings - Electricity use (kWh)	Estimated annual savings - Electricity use (kWh)	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-40). E.g., if data is entered for field ID 31, field ID 32 is also required, and vice versa.	Data Template	Schedule 4	N258
32	Estimated annual cost savings - Electricity use ($)	Estimated annual cost savings - Electricity use ($)	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42). If data is entered for field ID 32, field ID 31 is also required, and vice versa.	Data Template	Schedule 4	O258
33	Estimated **monthly** savings - Electricity demand (kW/mo)	Estimated monthly savings - Electricity demand (kW/mo) NOTE: Do NOT multiply by 12 for an annual number. Field should	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	P258

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ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
		report monthly average savings.					
34	Estimated **annual** cost savings - Electricity Demand ($)	Estimated annual cost savings - Electricity Demand ($) NOTE: While quantity savings are reported monthly, monetary savings should be reported on an annual basis.	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	Q258
35	Estimated annual savings - Natural gas (MMBtu)	Estimated annual savings - Natural gas (MMBtu)	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	R258
36	Estimated annual cost savings - Natural Gas ($)	Estimated annual cost savings - Natural gas ($)	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	S258
37	Estimated annual savings - Other type 1 (MMBtu)	Estimated annual resource savings - Other resource type 1 (MMBtu)	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	T258
38	Estimated annual cost savings – Other type 1 ($)	Estimated annual cost savings - Other resource type 1 ($)	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	U258
39	Estimated annual savings - Other type 2 (MMBtu)	Estimated annual resource savings - Other resource type 2 (MMBtu)	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	V258
40	Estimated annual cost savings – Other type 2 ($)	Estimated annual cost savings – Other resource type 2 ($)	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	W58

ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
41	Estimated annual savings - Water use (Kgal)	Estimated annual savings - Water use (Kgal).	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	Z258
42	Estimated annual cost savings - Water use ($)	Estimated annual cost savings - Water use ($).	Project	At least one pair of estimated annual resource savings and corresponding dollar savings is required (field IDs 31-42).	Data Template	Schedule 4	AA258
43	Estimated annual savings - Avoided O&M costs ($)	Estimated annual savings - Avoided O&M costs ($)	Project	Required only if applicable.	Data Template	Schedule 4	AB258
44	Estimated annual savings - Other avoided non energy costs ($)	Estimated annual savings - Other avoided non energy costs ($)	Project	Required only if applicable.	Data Template	Schedule 4	AC258
45	Total Energy Cost Savings ($)	Sum of the total energy cost savings in columns N, Q, S, U, and W.	Project	If savings information is entered at the ECM level, this field will be calculated automatically. If savings is entered at the project level, this field **MUST** be totaled manually by the user (unless the project has water and/or O&M cost savings only).	Data Template	Schedule 4	Y258
46	Guaranteed annual electricity savings	Guaranteed annual savings: Electricity use (kWh)	Project	At least one of the guaranteed annual saving fields (Field IDs 46-51) is required.	Additional Data tab	N/A	N/A
47	Guaranteed annual electric demand savings	Guaranteed annual savings: Electricity demand (kW) -- an annual figure calculated by multiplying the average monthly kW savings by 12	Project	At least one of the guaranteed annual saving fields (Field IDs 46-51)) is required.	Additional Data tab	N/A	N/A

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ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
48	Guaranteed annual natural gas savings	Guaranteed annual savings: Natural Gas (MMBtu)	Project	At least one of the guaranteed annual saving fields (Field IDs 46-51) is required.	Additional Data tab	N/A	N/A
49	Guaranteed annual savings – Other Type 1	Guaranteed annual savings for the Other Type 1 resource (MMBtu). Other resource types are indicated in the data template Escalation Rates Schedule	Project	At least one of the guaranteed annual saving fields (Field IDs 46-51) is required.	Additional Data tab	N/A	N/A
50	Guaranteed annual savings - Other Type 2	Guaranteed annual savings for the Other Type 2 resource (MMBtu). Other resource types are indicated in the data template Escalation Rates Schedule	Project	At least one of the guaranteed annual saving fields (Field IDs 46-51) is required.	Additional Data tab	N/A	N/A
51	Guaranteed annual water savings	Guaranteed annual savings: Water use (kGal)	Project	At least one of the guaranteed annual saving fields (Field IDs 46-51) is required.	Additional Data tab	N/A	N/A
52	Other incentive type	Type of other incentive (e.g., tax credit)	Project	If up-front incentives were included in template Schedule 2a OR incentives/payments were entered into template Schedule 3, at least one of Field ID 52 and Field ID 53 is required	Additional Data tab	N/A	N/A
53	DSM Program Type	Type of DSM incentive (choose from dropdown list)	Project	If up-front incentives were included in template Schedule 2a OR incentives/payments were entered into template Schedule 3, at least one of Field ID 52 and Field ID 53 is required	Additional Data tab	N/A	N/A
54	Project Reference	Indication of whether the project is being submitted as a reference project	Project	Required	Additional Data tab	N/A	N/A

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ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
55	Primary Facility Type	Primary facility type (choose from list)	Project	Required	Additional Data tab	N/A	N/A
56	Monitoring Period	Number of years M&V will be conducted	Project	Required	Additional Data tab	N/A	N/A
57a	Guaranteed annual energy/resource cost savings	Dollar value of guaranteed annual energy and resource savings ($)	Project	Required for reference projects	Additional Data tab	N/A	N/A
57b	Guaranteed total contract energy/resource cost savings	Dollar value of guaranteed energy and resource savings for the life of the contract ($)	Project	Required for reference projects	Additional Data tab	N/A	N/A
58a	Guaranteed annual O&M cost savings	Dollar value of guaranteed annual O&M savings ($)	Project	Optional	Additional Data tab	N/A	N/A
58b	Guaranteed total contract O&M cost savings	Dollar value of guaranteed O&M savings for the life of the contract ($)	Project	Optional	Additional Data tab	N/A	N/A
59a	Guaranteed annual other non-energy savings	Dollar value of guaranteed annual other non-energy energy and resource savings ($)	Project	Optional	Additional Data tab	N/A	N/A
59b	Guaranteed total contract other non-energy savings	Dollar value of other non-energy savings for the life of the contract ($)	Project	Optional	Additional Data tab	N/A	N/A
60	Lead engineer name	Applicant lead engineer on the project - name	Project	Required	Additional Data tab	N/A	N/A
61	Lead engineer email	Applicant lead engineer on the project - email	Project	Required	Additional Data tab	N/A	N/A
62	Lead engineer phone number	Applicant lead engineer on the project - phone number	Project	Required	Additional Data tab	N/A	N/A
63	Lead project manager name	Applicant's lead project manager on the project - name	Project	Required	Additional Data tab	N/A	N/A
64	Lead project manager email	Applicant's lead project manager on the project - email	Project	Required	Additional Data tab	N/A	N/A
65	Lead project manager phone number	Applicant's lead project manager on the project - phone number	Project	Required	Additional Data tab	N/A	N/A

ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
67	Type of reference project	Type of reference project (ESCO or ESP)	Project	Required for projects marked as a reference	Additional Data tab	N/A	N/A
68	Commodity procurement type	Commodity procurement type	Project	Required for projects marked as an ESP reference	Additional Data tab	N/A	N/A
69	Generation equipment type	Generation equipment type	Project	Required if project contains ECM technology type renewable/onsite generation	Additional Data tab	N/A	N/A
70	M&V Report Date	Indicate date of this annual M & V report submission by the ESCO or other reporting entity (mm/dd/yyyy)	Project	Required	M&V tab	N/A	N/A
66	Project Acceptance Date	Indicate date project implementation was accepted; denotes beginning of performance period	Project	Required for reference projects	M&V tab	N/A	N/A
71	Performance Year	Indicate year of the performance period for which M&V results are being reported	Project	Required	M&V tab	N/A	N/A
72	Verified annual avoided O&M cost savings for the project ($)	Verified annual dollar equivalent of avoided O&M costs ($)	Project	At least one of Field ID 72 or Field ID 73 is required.	M&V tab	N/A	N/A
73	Verified annual other avoided costs savings for the project ($)	Verified annual dollar equivalent of avoided costs ($)	Project	At least one of Field ID 72 or Field ID 73 is required.	M&V tab	N/A	N/A
74	Verified annual electricity demand savings for the project (kW)	Verified annual electricity demand reduction for the year (kW) for a project. This is an annual figure calculated by multiplying the average monthly kW savings by 12	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 74, field ID 75 is also required, and vice versa.	M&V tab	N/A	N/A
75	Verified (Expected) annual demand	Verified annual electricity demand reduction dollar savings for the year ($) for a project	Project	At least one pair of resource savings and dollar savings is required for field IDs	M&V tab	N/A	N/A

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ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
	cost savings for the project ($)			74-86. If data is entered for field ID 75, field ID 74 is also required, and vice versa.			
76	Verified annual water savings for the project (kGal)	Verified annual water savings for the year for a project	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 76, field ID 77 is also required, and vice versa.	M&V tab	N/A	N/A
77	Verified annual project water cost savings ($)	Verified annual water-related dollar savings for the year ($) for a project	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 77, field ID 76 is also required, and vice versa.	M&V tab	N/A	N/A
78	Verified annual natural gas savings for the project (MMBtu)	Verified annual Natural gas savings for the year (MMBtu) for a project	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 78, field ID 79 is also required, and vice versa.	M&V tab	N/A	N/A
79	Verified annual natural gas cost savings for the project ($)	Verified annual natural gas-related dollar savings for the year ($) for a project	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 79, field ID 78 is also required, and vice versa.	M&V tab	N/A	N/A
80	Verified annual Other Energy Savings Type 1 (MMBtu)	Verified annual savings of Other Savings Type 1 (MMBtu) for the year for a project	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 80, field ID 81 is also	M&V tab	N/A	N/A

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ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
				required, and vice versa.			
81	Verified annual savings for Other Type 1 cost ($)	Verified annual dollar-related savings of other (1) energy types ($) for the year for a project.	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 81, field ID 80 is also required, and vice versa.	M&V tab	N/A	N/A
82	Verified annual Other Energy savings Type 2 (MMBtu)	Verified annual savings of Other Savings Type 2(MMBtu) for the year for a project.	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 82, field ID 83 is also required, and vice versa.	M&V tab	N/A	N/A
83	Verified (annual other 2 cost savings for the project ($)	Verified annual dollar-related savings of other (2) energy types ($) for the year for a project.	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 83, field ID 82 is also required, and vice versa.	M&V tab	N/A	N/A
84	Verified annual electricity cost savings for the project ($)	Verified annual electricity-related dollar savings for the year ($) for a project	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 84, field ID 85 is also required, and vice versa.	M&V tab	N/A	N/A
85	Verified annual electricity savings for the project (kWh)	Verified annual electricity savings for the year (kWh) for a project	Project	At least one pair of resource savings and dollar savings is required for field IDs 74-86. If data is entered for field ID 85, field ID 84 is also required, and vice versa.	M&V tab	N/A	N/A

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ID	Field Name	Description	Level of Info	Requirement	Location	Sheet	Cell
86	Verified annual energy and resource cost savings	Verified annual dollar equivalent of energy and water related cost savings.	Project	Required	M&V tab	N/A	N/A

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Appendix F. Additional Data Fields

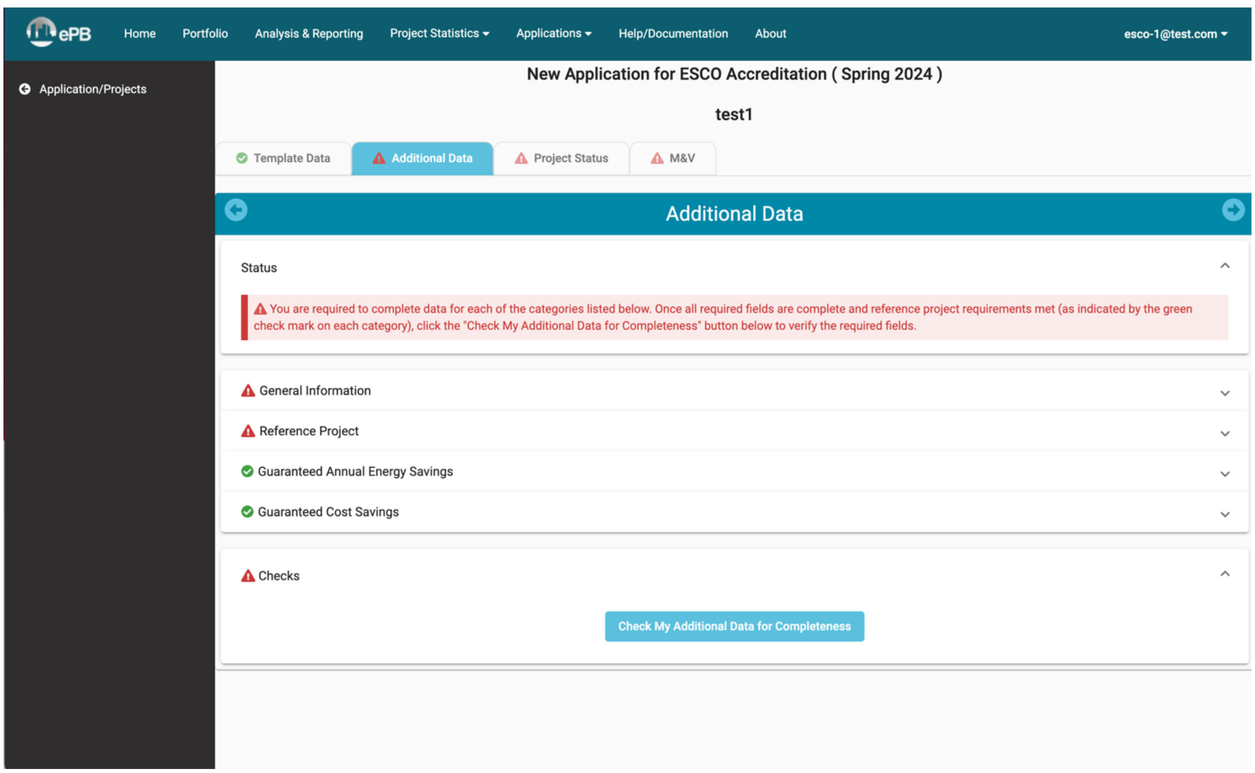
The additional project-level fields that applicants must manually enter into the Accreditation feature user interface (in the "Additional Data" section) are listed below, followed by screenshots of the fields in the user interface. This data must be entered for each project after the template data has been uploaded. See Appendix E above for information on which of these fields are required.

Applicants are encouraged to begin collecting data for these fields early in the data gathering process, and should share this list with other team members as necessary.

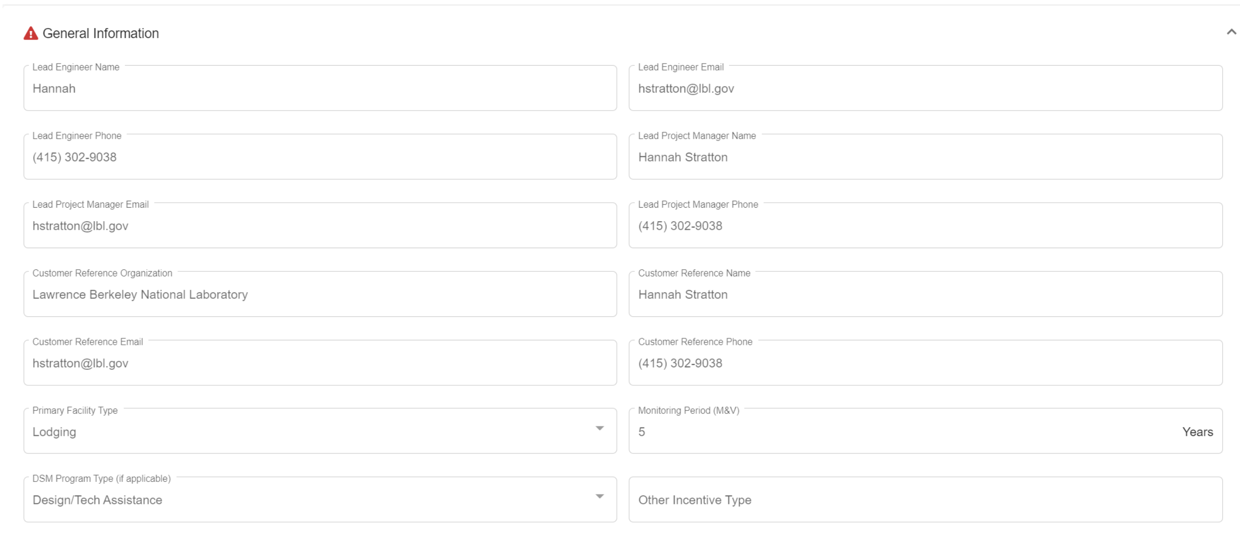
Field
Lead Engineer Name
Lead Engineer Email
Lead Engineer Phone
Lead Project Manager Name
Lead Project Manager Email
Lead Project Manager Phone
Customer Reference Organization
Customer Reference Name
Customer Reference Email
Customer Reference Phone
Primary Facility Type
Monitoring Period (M&V)
DSM Program Type (if applicable)
Other Incentive Type
Reference Project
Generation Equipment Type
Guaranteed Annual Energy Savings (Electricity Use, kWh)
Guaranteed Annual Energy Savings (Electricity Demand, kW)
Guaranteed Annual Energy Savings (Water Savings, kGal)
Guaranteed Annual Energy Savings (Natural Gas, MMBtu)

Guaranteed Annual Energy Savings (Other Savings Type 1 Annual Savings, MMBtu)
Guaranteed Annual Energy Savings (Other Savings Type 2 Annual Savings, MMBtu)
Guaranteed Cost Savings (Annual Energy/Resource, $)
Guaranteed Cost Savings (Total Contract Energy/Resource, $)
Guaranteed Cost Savings (Annual O&M, $)
Guaranteed Cost Savings (Total Contract O&M, $)
Guaranteed Cost Savings (Annual Non-Energy, $)
Guaranteed Cost Savings (Total Contract Non-Energy, $)

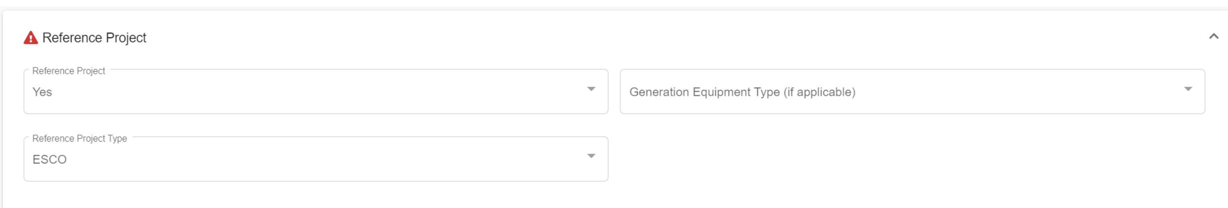
Upon first entry into the "Additional Fields" tab, the following screen appears. There are four panels that must be opened and completed: General Information, Reference Project, Guaranteed Annual Energy Savings, and Guaranteed Cost Savings.



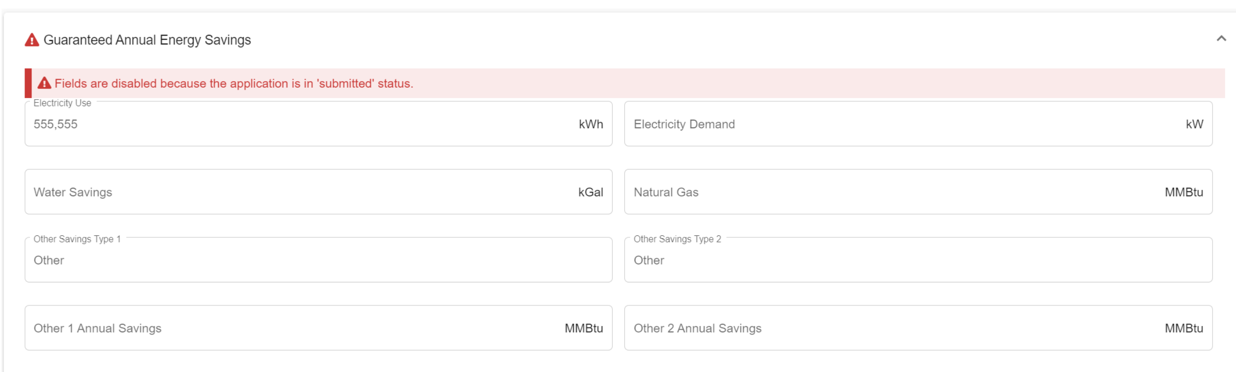
Click each panel to open it and reveal the data entry fields for each. The screenshot below shows the **General Information** required fields (the screenshot shows sample information only).



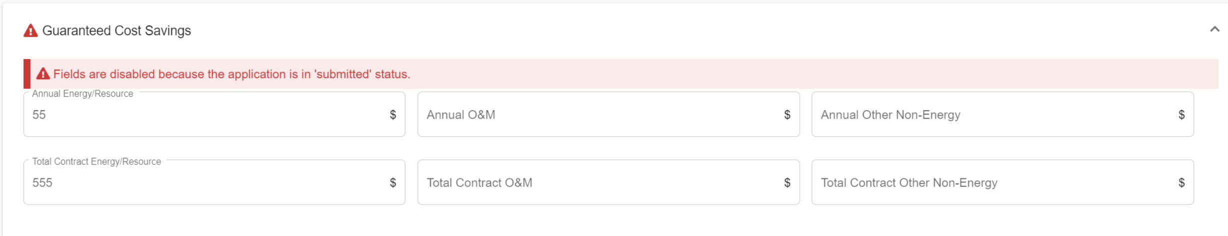
These are the **Reference Project** required fields (the screenshot shows sample information only).



These are the **Guaranteed Annual Energy Savings** required fields (the screenshot shows sample information only).



These are the **Guaranteed Cost Savings** required fields (the screenshot shows sample information only).



For reference projects, the Total Contract Energy/Resource Cost Savings plus the Total Contract O&M costs should equal or exceed the dollar amount of the portion of the project that is financed.