eProjectBuilder

DOE Qualified List User Guide

U.S. Department of Energy
Energy Efficiency & Renewable Energy

Berkeley Lab

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User Guide for eProject Builder DOE Qualified List of ESCOs Application Process

The U.S. Department of Energy (DOE) Qualified List application feature on eProject Builder (ePB) allows Energy Service Companies (ESCOs) to submit new applications and request recertification for the DOE Qualified List of ESCOs.

Federal agencies must use firms included on the DOE Qualified List of ESCOs for ESPC projects, and states may choose to use DOE Qualified List of ESCOs firms. Additional information for the DOE Qualified List of ESCOs is available at: https://energy.gov/eere/femp/doe-qualified-energy-service-companies

Software Requirements

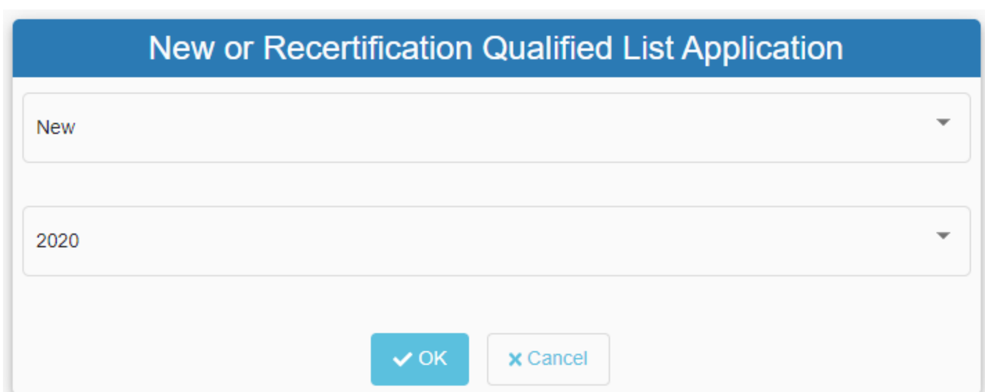
Software: Excel 2010 (Windows)/2011 (Mac) or newer.

Browser: Mozilla Firefox version 10.0.7 or higher, Google Chrome version 30 or higher, Internet Explorer 11, Microsoft Edge and Safari 9

Creating a New Application

To create a new DOE Qualified List Application:

1. Login to eProjectBuilder.lbl.gov (to request an ePB Account, click 'Request an Account' on the ePB homepage).
2. Click the Applications tab at the top of the menu toolbar, and select "DOE Qualified List."
3. Click "New or Recertification Qualified List Application" link on the left-hand sidebar.
4. Indicate the appropriate application type ("New" or "Recertification"), and choose the appropriate year. Click "OK."



Once your application has been created, it will display in the DOE Qualified List Applications Summary table. To make edits to your application, click the three dots under the "Action" column and click "Edit."

DOE Qualified List Applications

Action	Applicant Name	User Name	User Email	User Phone	Application Year	Application Type	Status
⋮	ESCO-1 Organization	ESCO-1 Anderson	esco-1@test.com		2020	New	In Progress

Edit

Overview of the Different Tabs

Your DOE Qualified List Application has four different tabs:

- **Summary:** Provides general application information under the “Status” section—including submittal status and further instruction for what steps need to be taken in the Projects and Application Materials tabs before an application can be submitted.
- **Projects:** Contains list of all your projects in ePB that are available for inclusion in your application, and provides a way to initiate new projects. Users indicate which projects are to be included in the application and enter the relevant reference contact information on this tab.
- **Application Materials:** Upload the required documents for your application here.
- **Application Settings:** Displays the application settings chosen at the time of application initiation (application type and year).

Requirements for Completing a New DOE Qualified List Application

New applications must complete the following:

- **Provide data for a minimum of two projects** (as well as contact information for project references).
- Upload the following documents:
    - DOE Form 415.1
    - Client questionnaire for Project #1
    - Client questionnaire for Project #2
    - Resumes for firm personnel (single file)

Including Projects in your Application

The Projects tab automatically lists all projects assigned to your ePB account that can be included in your Qualified List application.

- To include a project listed in the table in your application, click the box in the "Include in Application" column. A project must be in “approved” status in eProject Builder in order to be available to designate for the application. If your project does not have an option to be included in an application, it is because the project is not in “approved” status.
- To convert a project from “pending” to “approved” status, navigate to the Project Dashboard by clicking the project name in the summary table. Make sure the project contains the project information you want to submit (see the ePB User Guide on the ePB Help & Documentation page for more information on that process). Then click the “Submit Project” link on the sidebar. The

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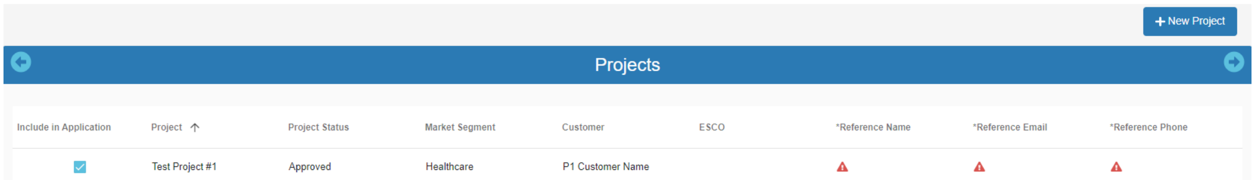
Phone: 510-486-7442
Web: eprojectbuilder.lbl.gov

Project Initiator (whoever first initiated the project in ePB) will then need to approve the project. If you initiated the project and you uploaded the data, then only you need to approve the project.

- Once the project has been approved, return to your application by clicking the "Applications" tab at the top of the screen and selecting "DOE Qualified List." To make edits to your application, click the three dots under the "Action" column and click "Edit." Click the Projects tab. The newly-approved project will now appear in the table and can now be selected for inclusion as described above.

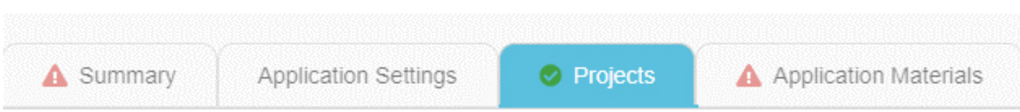


- To add new projects to eProject Builder for inclusion in your application, click "+New Project" and provide the information to initiate the project, assigning yourself as the Project Builder. Provide relevant project information through the online system data fields, or by uploading a Non-Calculating template. See the ePB User Guide on the [ePB Help & Documentation page]() for more information on this process. Once these projects have been submitted and are in "approved" status, they will appear as available for inclusion in the Projects Summary table.

> Projects do not need to be 100% data complete (as reported on the project Dashboard) to be included in an application. Messaging about project data completion status on the Dashboard should be disregarded.
>
> If you are unable to submit a project due to the fact that it is not 100% data complete, click the "calculation type" link on the sidebar and select "Non-Calculating." This will remove any minimum field requirements, allowing you to submit the project.
>
> When creating new projects for inclusion in a DOE Qualified List application, be sure to use the non-calculating template or choose non-calculating mode in the online system. This will allow you to submit the project without completing all data field requirements.

Adding Project Reference Information

Once you have selected a minimum of two projects for inclusion in your application, red required indicators will appear in the reference contact information fields. Complete the three right-most fields (Reference Name, Reference Email, and Reference Phone) in that row by clicking on the field and typing in the information. When the Projects section of the application is complete, the tab will indicate that all requirements have been met by displaying a green checkmark symbol.



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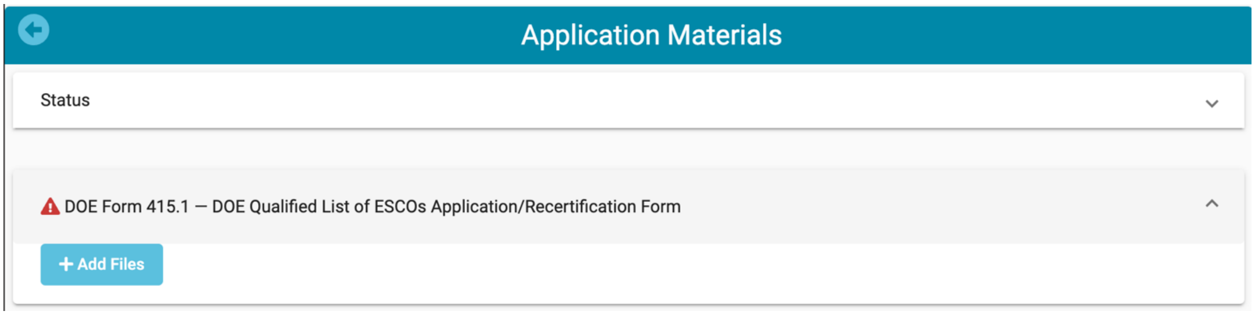
Uploading Documents

Click the "Application Materials" header. You are required to upload documents for the five required categories listed. Click on a category to expand the panel, then click on the "Add Files" button to upload documents for the selected category. Choose the appropriate file to upload and click "OK."



Note that while only five documents are required, you may upload additional optional materials as described on the [DOE/FEMP web page](). Once files have been added to each of the required documents panels, the Application Materials tab will no longer display a required field indicator, and instead will display a green checkmark.

Once at least two projects have been included (as well as the relevant contact information), and the application materials have been uploaded, the complete indicator on the sidebar will read "100% Complete." Your application is ready to be submitted.

Requirements for Completing a Re-Certification DOE Qualified List Application

The only requirement for Recertification applicants is a signed recertification letter. Recertification applicants are not required to provide any project information, but can do so if they wish. For more information on providing project data, see the "Including Projects in Your Application" section on page 2 above.

To upload your signed recertification letter, click the "Application Materials" tab. Click the "Signed Recertification Letter" banner and add the appropriate file. Once your recertification letter file has been successfully uploaded, your application is ready for submission.

Submitting Your DOE Qualified List Application

Your application is ready to be submitted once the percentage complete on the sidebar reads "100% complete." If the progress bar indicates completion other than 100%, your application cannot be submitted. You can use the required field indicators ⚠ present on tabs to determine where missing documents or data may be in your application.

Once you are ready to submit your application, click the "Submit Application" link on the sidebar. To confirm your application has been successfully submitted, click the "Qualified List Home" link on the sidebar. The "Status" column in your application summary table will read "Submitted."

Note that once you submit your application for Qualified List review, you will no longer be able make additional modifications. If you wish to make changes to an application that has already been submitted, click the "Unlock Application" button on the sidebar.

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