

## CMPAS RESIDENTIAL REBATE PROGRAM

# P3 USER GUIDE FOR MARKET ACTORS [TRADE ALLIES/CONTRACTORS/ELECTRICIANS]

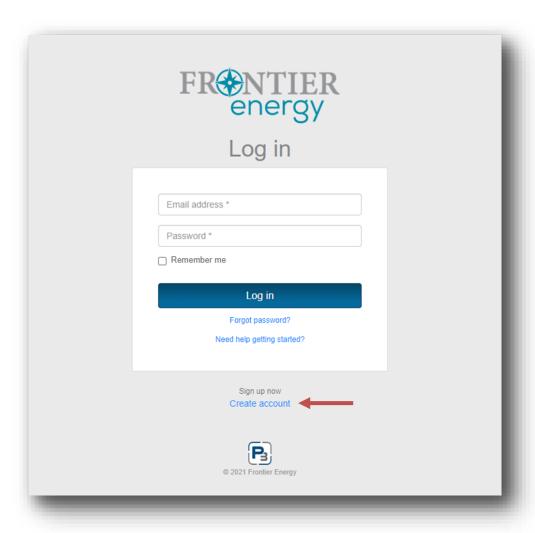


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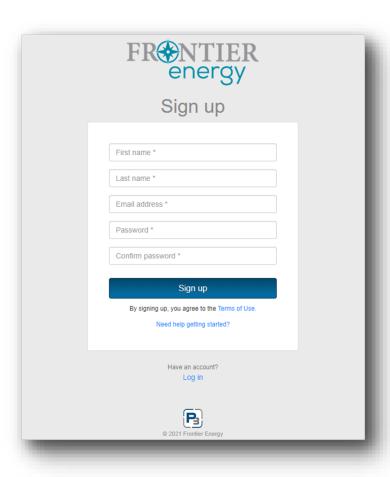
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## P3 Registration Process

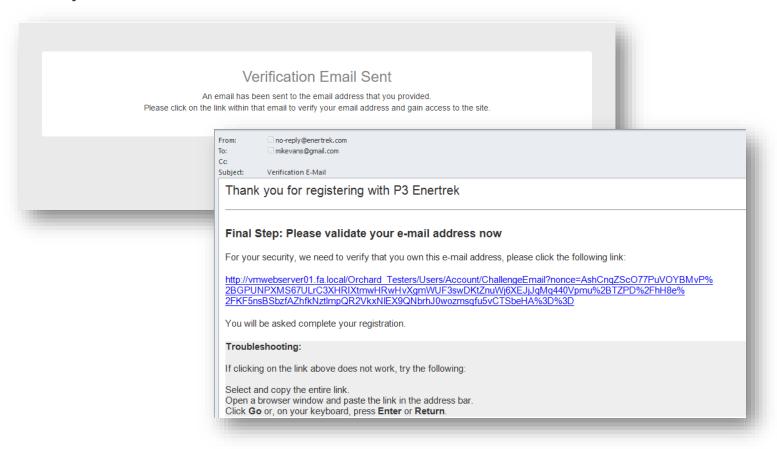
- 1. Navigate to: <a href="https://energyinsight.p3.enertrek.com/">https://energyinsight.p3.enertrek.com/</a>
  a. Click on the Create Account link in blue



- 2. Enter all required information (*Please note*: your email address and password entered will be your login credentials)
  - a. First Name
  - b. Last Name
  - c. Email address
  - d. Password
  - e. Confirm Password

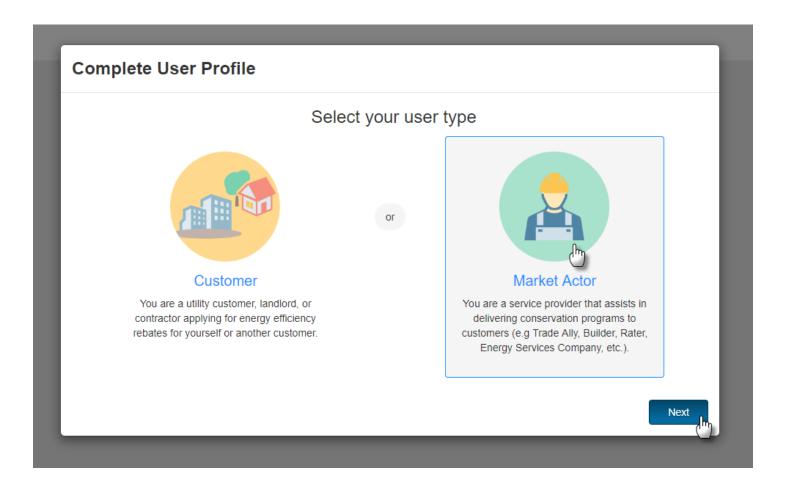


3. Users attempting to register with P3 will be sent a verification email to the email address provided. Please check your spam/junk folders if you do not receive this email within 5 minutes

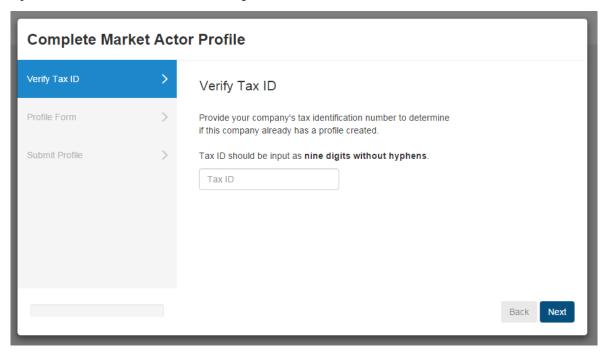


#### Creating your Company Profile

- 1. Upon clicking the link provided, users will be taken to the P3 site and select the User type associated with their profile
  - a. Select the Market Actor Icon if you are a service provider that assists a Utility with energy conservation programs. This includes Trade Ally, Contractors, Builders, Raters etc.
  - b. Click the Next button

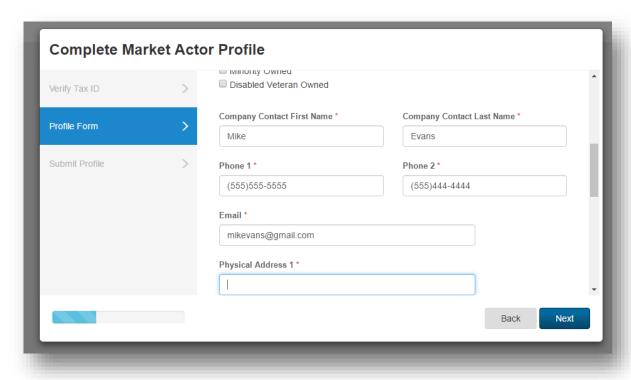


- 2. Complete Market Actor Profile Verify Tax ID
  - a. Provide Company Tax Id
    - i. This is necessary because if multiple users from the same company apply for rebates, all the applied rebates for that company will be available to be viewed together

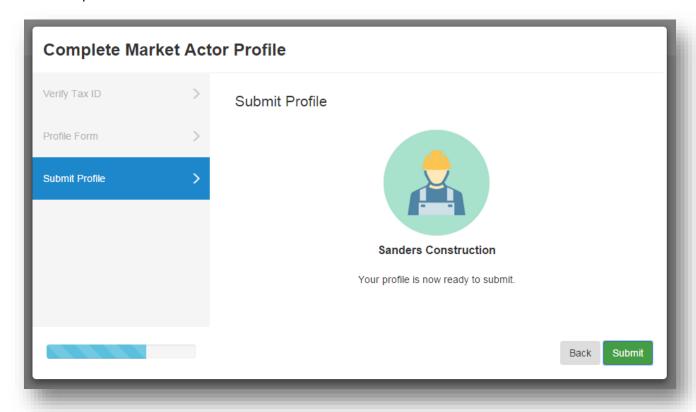


<sup>\*</sup> Please note: If Tax ID entered already exists you will be provided a link to the individual that has registered your business with P3

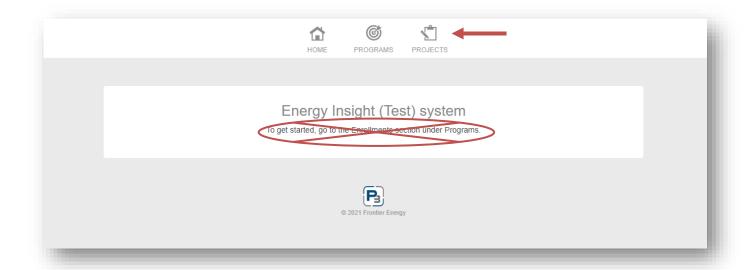
- 3. Provide Additional Company Information.
  - a. Please note that all required fields are indicated with a red asterisk
  - b. Click the Next button to continue



#### 4. Submit market actor profile

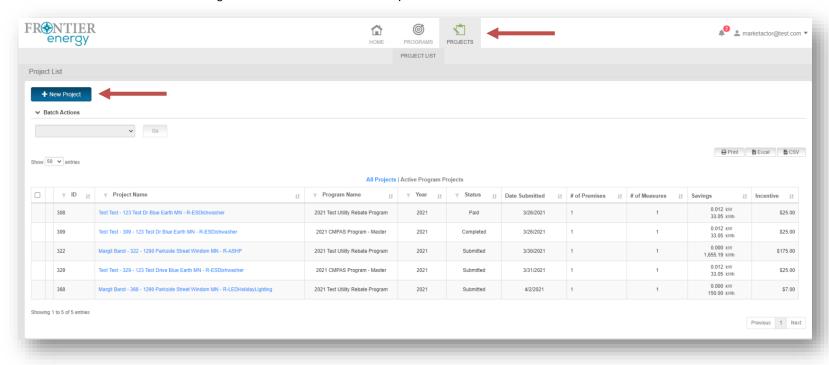


Attention! After Submitting a market actor profile, a page will appear that says, "To get started, go to the Enrollments section under Programs." This is misleading. Instead, click Projects to get started.

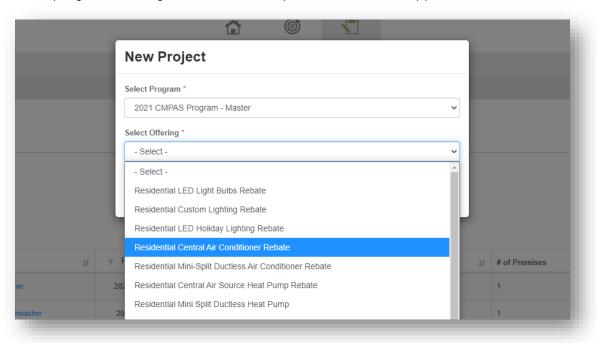


#### Creating and Submitting Rebate Applications in P3

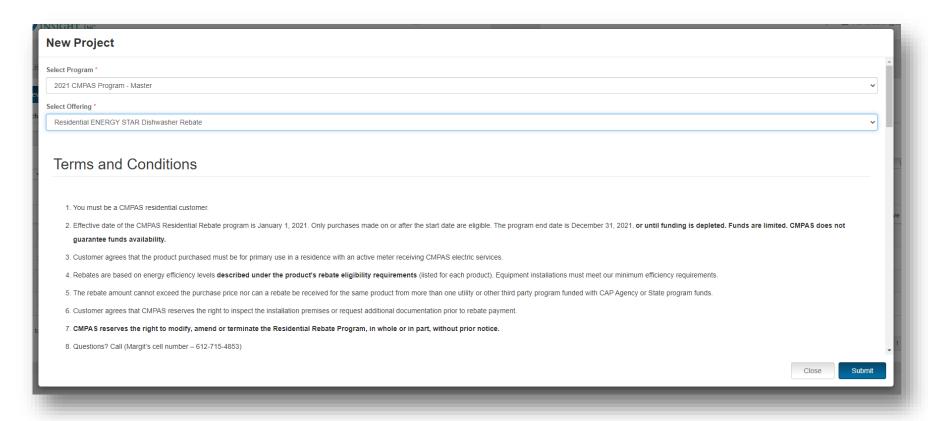
- 1. Navigate to the Projects icon at the top of the screen
  - a. Click Project List from the drop-down menu
  - b. Click the + New Project button in blue
- 2. The New Project modal will appear
  - a. Select the 2021 CMPAS Program Master from the drop-down menu



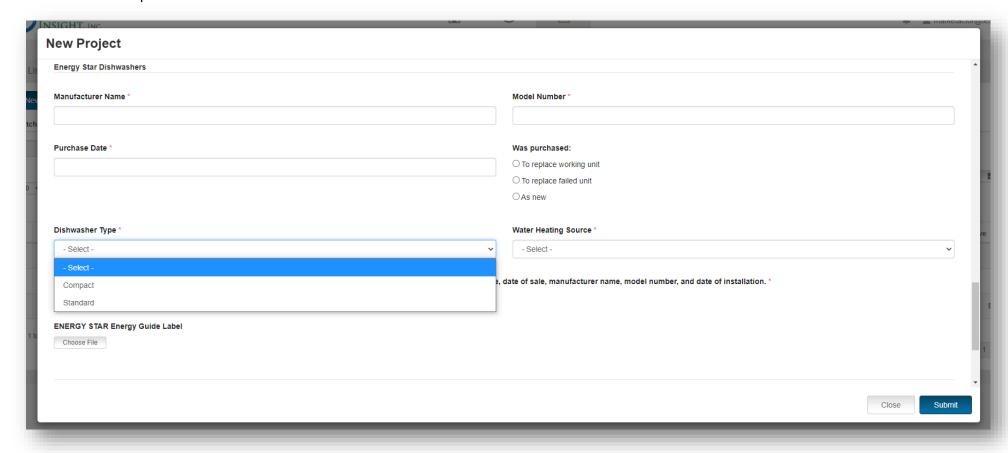
b. Select a program offering from the next drop-down menu that appears



- 3. The New Project modal will expand to display the New Project form
  - a. Please note that you will need to scroll down the access all required fields within the form

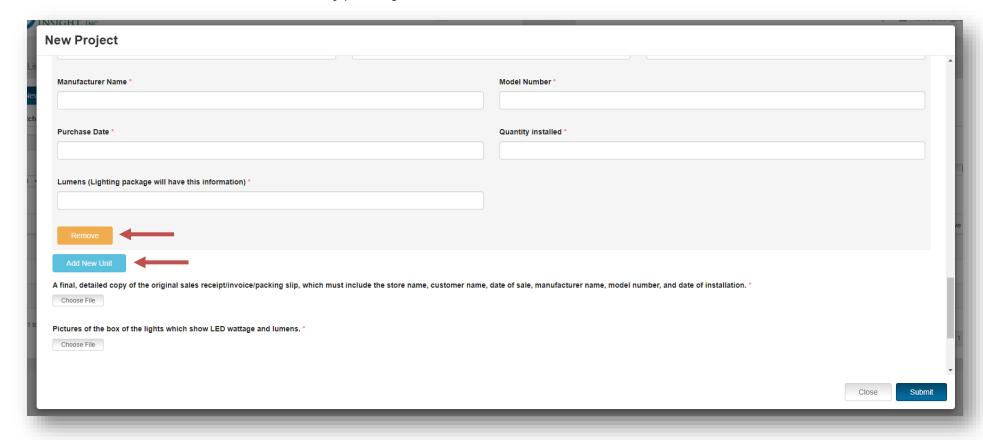


- 4. Please note that installation information fields are specific to the selected program offering
  - a. Drop-down fields will be available for certain fields



b. Required fields are indicated with a red asterisk

- 5. Projects that have multiple units can be entered by clicking the Add New Unit button
  - a. An additional installation information form will appear in the New Project Modal
  - b. Additional units can be removed by pressing the "Remove" button

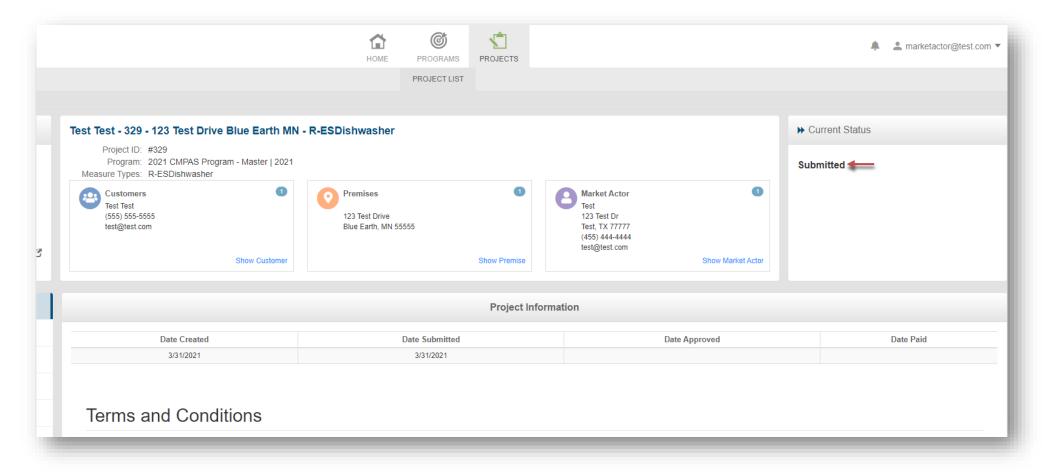


#### 6. Click the Submit button at the bottom to submit the form



#### 7. The Project Home page will load

a. The project is now in Submitted status



#### Checking the Status of a Rebate

Projects will remain in a Submitted status pending Approval by the Program Administrator. After submission, rebates can go through the following statuses:

- Submitted
- Approved
- Denied
- Paid
- Completed
- Hold

Market Actor users can check the status of rebates they submitted at any time by navigating to the Projects Icon on the top navigation bar and selecting Project List from the drop-down menu.