

# PPL Electric Utilities Business Rebate Program

## Instructions for Applying Online

### Contents

Request Account .....	2
Reset Password .....	5
Change Password .....	8
Rebate Applications.....	10
Searching and Sorting Projects .....	17
Fixing Errors .....	20

If you need additional assistance, please call 1-866-432-5501.

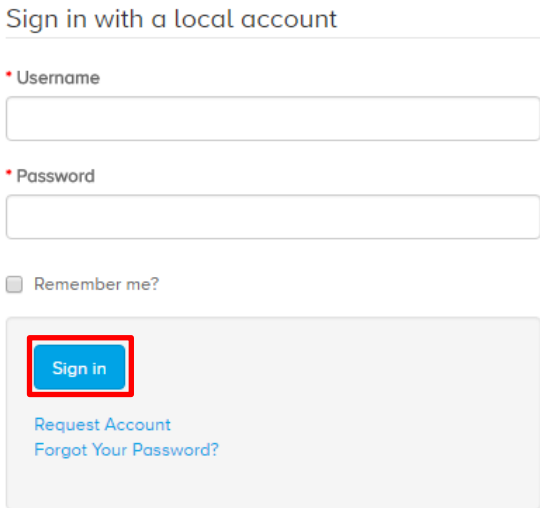
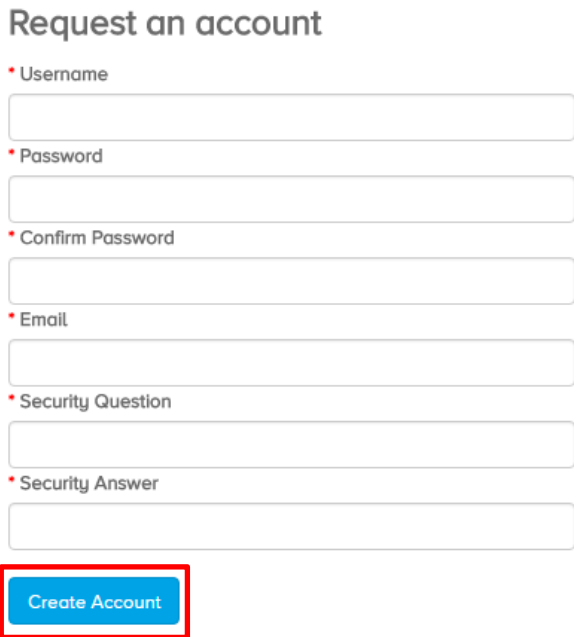
## Web Portal: Request Account

Program:	PPL Electric Utilities
Applies to:	Trade Allies
Prerequisites:	N/A
Date:	6/2/2016

### Introduction:

Requesting an account creates a username and password to access the Web Portal. Trade Allies who are new to the Web Portal and do not have sign in credentials should request an account.

# Request Account

Steps	Instructions	Illustrations
1	Click <a href="#">REQUEST ACCOUNT</a> .	 <p>Sign in with a local account</p> <p>* Username</p> <p>* Password</p> <p><input type="checkbox"/> Remember me?</p> <p><b>Sign in</b></p> <p><a href="#">Request Account</a> <a href="#">Forgot Your Password?</a></p>
2	Complete the required fields to <a href="#">REQUEST AN ACCOUNT</a> . 2.1 Your username should be your firstnamelastname, no spaces (e.g., BobBuilder). 2.2 The password you select requires a minimum of six characters. 2.3 Click <a href="#">CREATE ACCOUNT</a> button to be directed to my profile page.	 <p><b>Request an account</b></p> <p>* Username</p> <p>* Password</p> <p>* Confirm Password</p> <p>* Email</p> <p>* Security Question</p> <p>* Security Answer</p> <p><b>Create Account</b></p>

3.1 Complete the required (\*) fields in the [UPDATE YOUR PROFILE](#) section.

3.2 Click [UPDATE](#).

Note. Your email address will automatically display on the [EMAIL](#) field.

## Update Your Profile

First Name \*

Last Name \*

E-mail

Business Phone

Contact Type \*

Company Name \*

Address 1

Address 2

City

State

Zip Code

[Update](#)

Congratulations, you now have access to the Portal!

Note: You cannot submit projects until after you have received an email confirming your credentials.

## Web Portal: Reset Password

Program:	PPL Electric Utilities
Applies to:	Trade Allies
Prerequisites:	N/A
Date:	6/2/2016

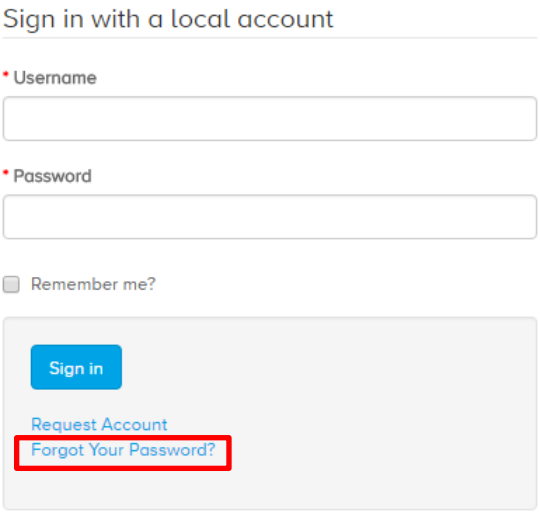
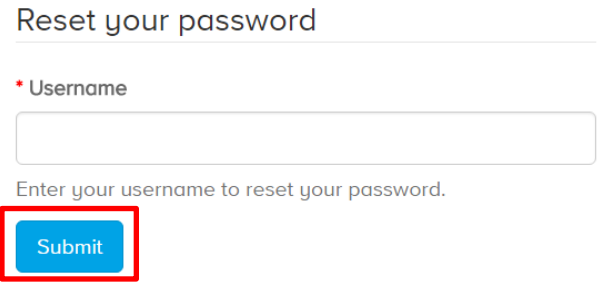
### Introduction:

Trade Allies who have created a username and password to the Web Portal and do not remember their password should request a password reset.

Trade Allies who have created a username and password to the Web Portal, remember their sign in credentials, and wish to update their password may do so in the Web Portal Profile page.

# Reset Password

Trade Allies who do not remember their password should request a password reset.

Steps	Instructions	Illustrations
4	Click <a href="#">FORGOT YOUR PASSWORD</a> .	 <p>Sign in with a local account</p> <p>* Username</p> <input type="text"/> <p>* Password</p> <input type="password"/> <p><input type="checkbox"/> Remember me?</p> <p><a href="#">Sign in</a></p> <p><a href="#">Request Account</a></p> <p><a href="#">Forgot Your Password?</a></p>
5	2.1 Enter username. 2.2 Click <a href="#">SUBMIT</a> .	 <p>Reset your password</p> <p>* Username</p> <input type="text"/> <p>Enter your username to reset your password.</p> <p><a href="#">Submit</a></p>

6

3.1 Answer security question.

3.2 Click [SUBMIT](#).

Note.

- You will receive an email with a new secure password.

## Reset your password

Username

ppluat\_admin

Question

ppluat\_admin

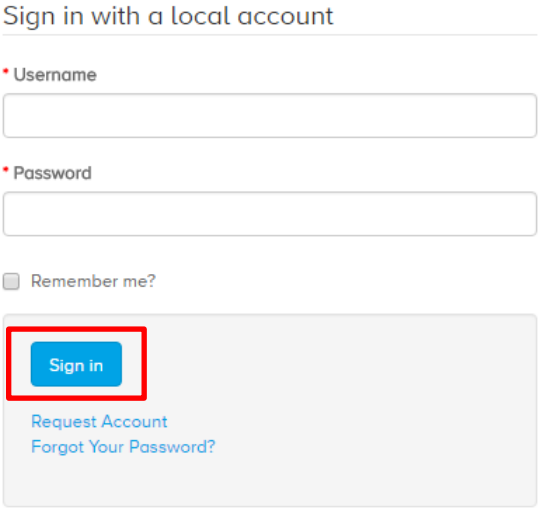
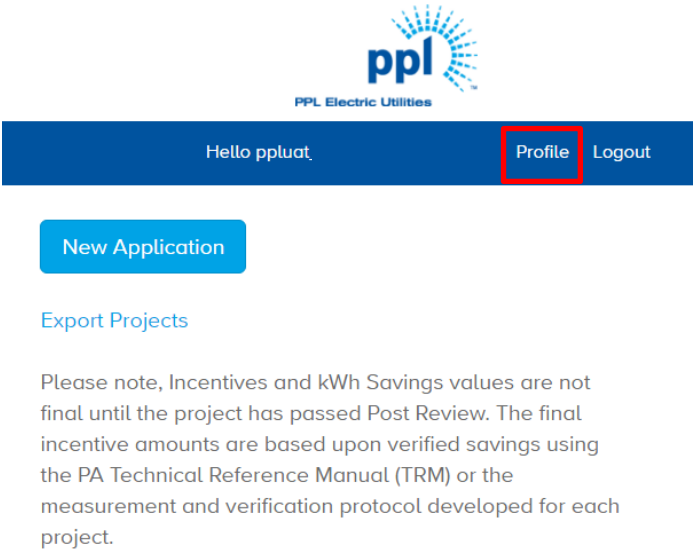

\* Answer

Answer the question correctly to receive your password.

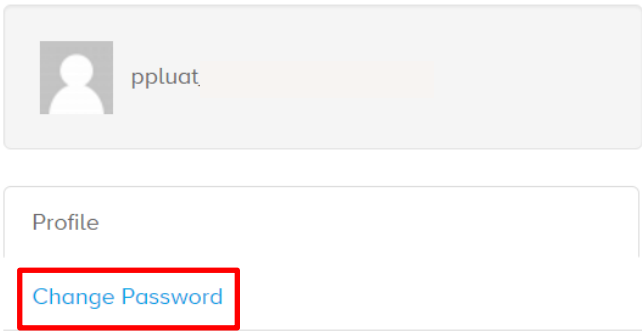
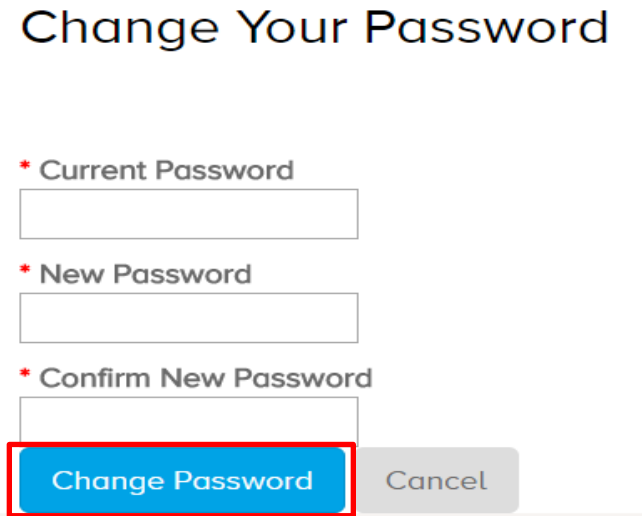
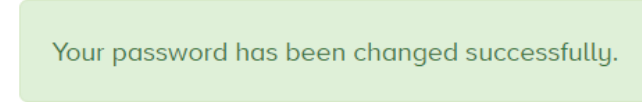
Submit

# Change Password

Trade Allies who received a new secure password upon following the Reset Password steps and wish to change their password should follow these steps.

Steps	Instructions	Illustrations
1	1.1 Enter username and password. 1.2 Click <a href="#">SIGN IN</a> .	 <p>Sign in with a local account</p> <p>* Username</p> <input type="text"/> <p>* Password</p> <input type="password"/> <p><input type="checkbox"/> Remember me?</p> <p><b>Sign in</b></p> <p><a href="#">Request Account</a>  <a href="#">Forgot Your Password?</a></p>
2	Click <a href="#">PROFILE</a> .	 <p style="text-align: center;"> PPL Electric Utilities</p> <p style="text-align: center;">Hello ppluat <b>Profile</b> Logout</p> <p><a href="#">New Application</a></p> <p><a href="#">Export Projects</a></p> <p>Please note, Incentives and kWh Savings values are not final until the project has passed Post Review. The final incentive amounts are based upon verified savings using the PA Technical Reference Manual (TRM) or the measurement and verification protocol developed for each project.</p>



<p>3</p>	<p>Click <a href="#">CHANGE PASSWORD</a>.</p>	 <p>The screenshot shows the 'My Profile' page. At the top, there is a header 'My Profile'. Below it is a user profile card with a placeholder icon and the name 'ppluat'. Underneath is a 'Profile' section containing a 'Change Password' link, which is highlighted with a red rectangular box.</p>
<p>4</p>	<p>Complete the required fields to <a href="#">CHANGE YOUR PASSWORD</a>.</p> <p>4.1 Complete the required fields to <a href="#">CHANGE YOUR PASSWORD</a>.</p> <p>4.2 Click <a href="#">CHANGE PASSWORD</a>.</p> <p>Note.</p> <ul style="list-style-type: none"> <li>The <a href="#">NEW PASSWORD</a> you select requires a minimum of six characters.</li> </ul>	 <p>The screenshot shows the 'Change Your Password' form. It has three input fields: '* Current Password', '* New Password', and '* Confirm New Password'. Below the fields are two buttons: 'Change Password' (highlighted with a red box) and 'Cancel'.</p>
<p>5</p>	<p>Congratulations! You have successfully changed your password.</p>	 <p>The screenshot shows the 'Change Your Password' confirmation message. It features a green box with the text: 'Your password has been changed successfully.'</p>

## Web Portal: Rebate Applications

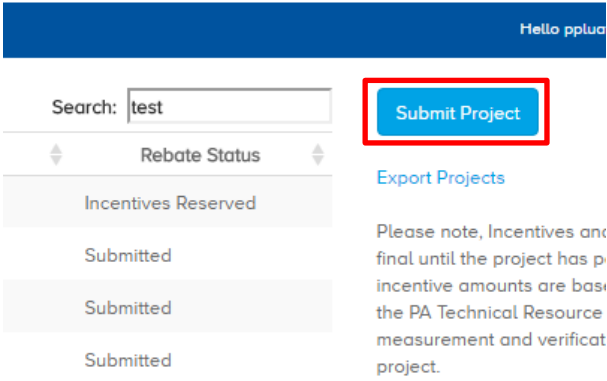
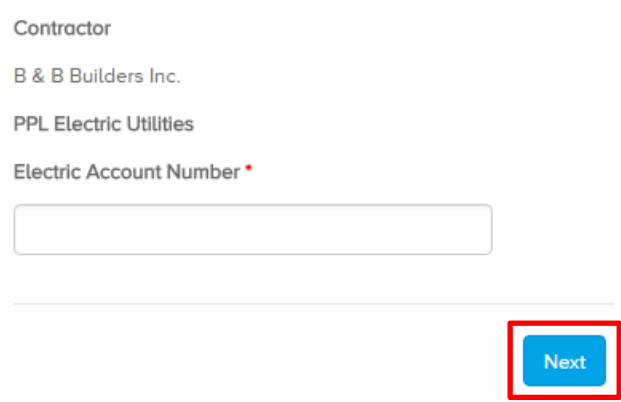
Program:	PPL Electric Utilities
Applies to:	Trade Allies
Prerequisites:	<a href="#">REQUEST ACCOUNT</a> job aid
Date:	6/2/2016

### Introduction:

Create a rebate application on behalf of your customer by submitting a project and following the five stages of the rebate application creation.

1. Enter program information
2. Customer information
3. Equipment
4. Upload documents
5. Review & submit

# Rebate Application

Steps	Instructions	Illustrations
6	Click <b>SUBMIT PROJECT</b> .	 <p>Search: test <b>Submit Project</b></p> <p>Rebate Status</p> <ul style="list-style-type: none"> <li>Incentives Reserved</li> <li>Submitted</li> <li>Submitted</li> <li>Submitted</li> </ul> <p>Export Projects</p> <p>Please note, Incentives are final until the project has passed incentive amounts are based on the PA Technical Resource measurement and verification project.</p>
7	7.1 Enter the <b>ACCOUNT NUMBER</b> . 7.2 Click <b>NEXT</b> .	 <p>Contractor</p> <p>B &amp; B Builders Inc.</p> <p>PPL Electric Utilities</p> <p>Electric Account Number *</p> <p><b>Next</b></p>

8.1 Complete the required (\*) fields in the **APPLICANTS AND CONTACT INFORMATION, PAYMENT INFORMATION, LOCATION INFORMATION, and PROJECT INFORMATION** section.

This information is located at the top of the Program’s Rebate Application.

8.2 Click **NEXT**.

### Applicant and Contact Information

<b>Applicant Information</b>	<b>Contact Information</b>
Business Name * <input type="text"/>	First Name * <input type="text"/>
Tax Status * <input type="text"/>	Last Name * <input type="text"/>
Taxpayer ID # (SSN/FEIN) <input type="text"/>	Business Phone * <input type="text"/>
<b>Business Address</b>	Mobile Phone <input type="text"/>
Street Address * <input type="text"/>	Email * <input type="text"/>
<b>Business Address</b>	<input type="text"/>
Street Address * <input type="text"/>	Email * <input type="text"/>
Street Address 2 <input type="text"/>	<input type="text"/>
City * <input type="text"/>	<b>Contact Address</b>
	Street Address * <input type="text"/>

### Payment Information

Rebate Payable To: \*

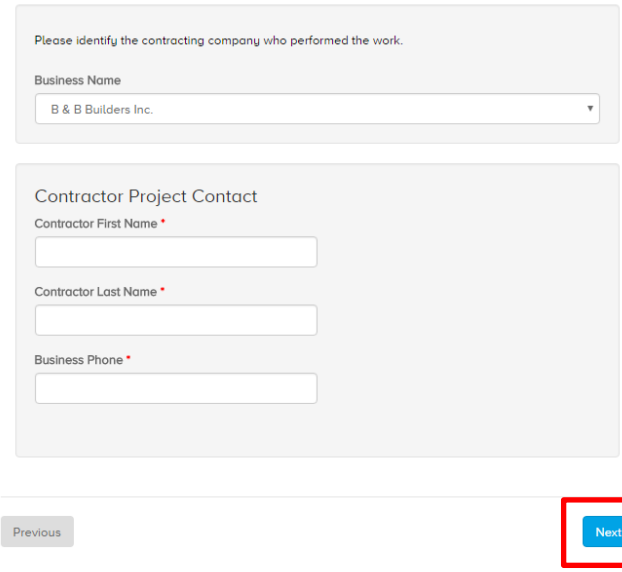
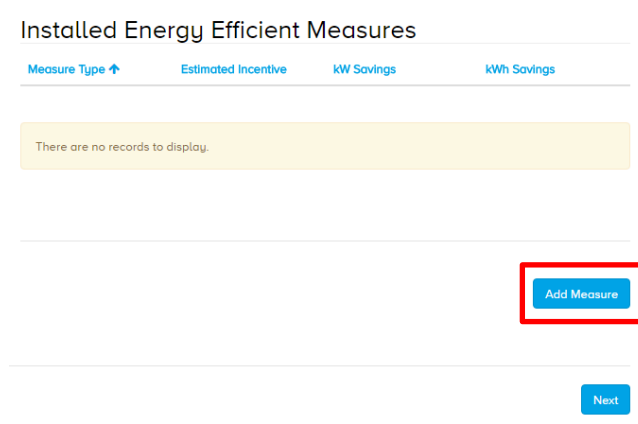
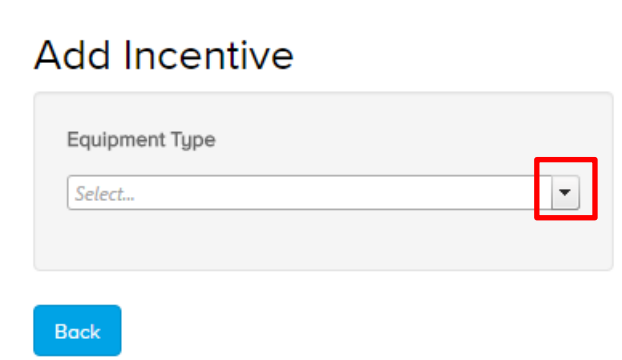
### Location Information (where equipment will be installed)

Location Name \*

Building Name (Optional)

### Project Information

Project Name <input type="text"/>	Construction Start Date * <input type="text"/>
Construction Type * <input type="text"/>	Estimated Construction End Date <input type="text"/>
Total Project Cost (including labor) * <input type="text"/>	

<p>9</p>	<p>9.1 Enter contractor information. 9.2 Click <b>NEXT</b>.</p>	 <p>Please identify the contracting company who performed the work.</p> <p>Business Name B &amp; B Builders Inc.</p> <p>Contractor Project Contact</p> <p>Contractor First Name *</p> <p>Contractor Last Name *</p> <p>Business Phone *</p> <p>Previous <b>Next</b></p>
<p>10</p>	<p>10.1 Click <b>ADD MEASURE</b>.</p>	 <p>Installed Energy Efficient Measures</p> <p>Measure Type ↑ Estimated Incentive kW Savings kWh Savings</p> <p>There are no records to display.</p> <p><b>Add Measure</b> Next</p>
<p>11</p>	<p>11.1 From the <b>EQUIPMENT TYPE</b> dropdown menu, select the equipment type.</p>	 <p>Add Incentive</p> <p>Equipment Type</p> <p>Select...</p> <p><b>Back</b></p>

12

12.1 Complete required fields.

12.2 Click [ADD](#).

Note.

- You will be redirected to the [MEASURE SUMMARY](#) page.

## Add Incentive

Equipment Type  
Compressed Air:Air Tanks for Load/No Load Compressor

Install Date \*

Quantity \*

Facility Type \*

Occupancy Hours \*

Horsepower \*

Cancel Clear **Add**

13

13.1 Confirm the information listed is correct and click [NEXT](#).

Note.

- If information is not correct, click [EDIT](#) and update information.
- You may add another incentive by clicking on the [ADD MEASURE](#) button.

## Installed Energy Efficient Measures

	Measure Type ↑	Estimated Incentive	kW Savings	kWh Savings
<a href="#">Edit</a>	Air Tanks for Load / No Load Compressors:6424	\$0.00	0.0000	0.0000

[Add Measure](#)

[Next](#)

14

14.1 Click **UPLOAD** to select documents to upload from your device.

### Upload your documentation

Don't forget to provide the necessary documentation! (hint, we cannot process your application without it.)

Documentation includes: Itemized invoices, equipment specifications, engineering reports, modeling output, photographs, W-9 signed by company receiving the incentive payment (Name, must match Payee), Copy of recent PPL Electric Utilities bill for installation address

Select documents to upload from your device using the Upload button below.

Supported File formats: PDF,PNG,.JPG,.JPEG,BMP,XLS,CSV,XLSX,DOCX,DOC

Max file size (MB): 50

**Upload**

Previous

**Next**

15

The selected documents will appear below the **UPLOAD** button. When the upload is complete the dot in front of the selected document changes from yellow to green.

15.1 Click **NEXT**.

### Upload your documentation

Don't forget to provide the necessary documentation! (hint, we cannot process your application without it.)

Documentation includes: Itemized invoices, equipment specifications, engineering reports, modeling output, photographs, W-9 signed by company receiving the incentive payment (Name, must match Payee), Copy of recent PPL Electric Utilities bill for installation address

Select documents to upload from your device using the Upload button below.

Supported File formats: PDF,PNG,JPG,JPEG,BMP,XLS,CSV,XLSX,DOCX,DOC

Max file size (MB): 50

**Upload**  
● Invoice.docx

**Delete**

Previous

**Next**

16

16.1 Confirm the information listed is correct.

If information is not correct, click [PREVIOUS](#) and update information.

16.2 After reading the program terms and conditions, check box below [ACKNOWLEDGEMENT](#).

16.3 Click [SUBMIT](#).

### Installed Energy Efficient Measures

Measure Type ↑	Estimated Incentive	kW Savings	kWh Savings
Air Tanks for Load / No Load Compressors:6424	\$0.00	0.0000	0.0000

### Terms and Conditions

In exchange for the receipt of any incentive payments from PPL Electric Utilities for which the applicant may be eligible, the applicant:

1. Understand that all customers who receive electricity via the PPL distribution network are eligible to apply for these incentives, regardless of the electric generation supplier from which the customer has

### Acknowledgement

I have read and understand the program requirements, measure specifications, and Terms and Conditions and Final Application Agreement set forth in this application (collectively, the "Requirements") and agree to abide by the Requirements. Furthermore, I concur that I must meet all eligibility criteria in order to be paid under this program.

Previous

Submit

17

You will now see your confirmation notice and [PROJECT TRACKING ID](#).

17.1 Use this information to track the progress of your application.

### Success!

Congratulations on taking the first step toward energy and cost savings for your business!

Now what?

- 1) A Program representative will review your application
- 2) Pre-construction visit may be needed. A program representative will contact you.
- 3) A Program representative will provide you a notice funds have been reserved
- 4) You (or your contractor) will complete the installation of the equipment.
- 5) You need to log back in, update the construction end date, edit previously submitted measures, and upload your final documentation.
- 6) A program representative will review your final application. Post-construction visit may be needed. A program representative will contact you.
- 7) Your rebate check will be issued.

Project Tracking ID  
RBT-715669



## Web Portal: Searching and Sorting Projects

Program:	PPL Electric Utilities
Applies to:	Trade Allies
Prerequisites:	<a href="#">REQUEST ACCOUNT</a> job aid
Date:	6/2/2016

### Introduction:

Searching and sorting projects to focus on subsets of projects can be done on the dashboard page.

# Sorting

Click the column headers to sort your projects by project id, location, incentive amount, incentive, kWh savings, and rebate status. Click the same column header again to toggle between ascending and descending sort order.

## PPL Electric Utilities Business Rebate Program



Show  entries Search:

Project ID	Location	Incentive	kWh Savings	Rebate Status
RBT-715582				Not Submitted
RBT-715583				Not Submitted
RBT-715585				Not Submitted
RBT-715586				Not Submitted
RBT-715587	Verify TEST4	\$0.00	1564.1600000000	Incentives Reserved
RBT-715605				Not Submitted
RBT-715607				Not Submitted
RBT-715609				Not Submitted
RBT-715618	Test UAT	\$2.08	41.5317000000	Submitted

Showing 1 to 9 of 9 entries Previous  Next

[Submit Project](#)

### Export Projects

Please note, Incentives and kWh Savings values are not final until the project has passed Post Review. The final incentive amounts are based upon verified savings using the PA Technical Resource Manual (TRM) or the measurement and verification protocol developed for each project.

### Incentive Status Codes

#### Not Submitted

You have not yet submitted the project application. You can edit the project details and upload supporting documents

#### Submitted

You have submitted the project application and it is in the queue for review. You cannot edit any fields or upload attachments.



# Searching

Find a project by typing a project id, location, incentive, kWh savings or rebate status in the search field.

## PPL Electric Utilities Business Rebate Program

PROJECTS RESOURCE CENTER

Show  entries Search:

Project ID	Location	Incentive	kWh Savings	Rebate Status
<a href="#">RBT-715587</a>	Verify TEST4	\$0.00	1564.1600000000	Incentives Reserved
<a href="#">RBT-715609</a>	Test Date	\$6.18	123.6900000000	Submitted
<a href="#">RBT-715618</a>	Test UAT	\$2.08	41.5317000000	Submitted
<a href="#">RBT-715665</a>	TEST AGAIN	\$0.00	0.0000000000	Submitted

Showing 1 to 4 of 4 entries (filtered from 11 total entries) Previous  Next

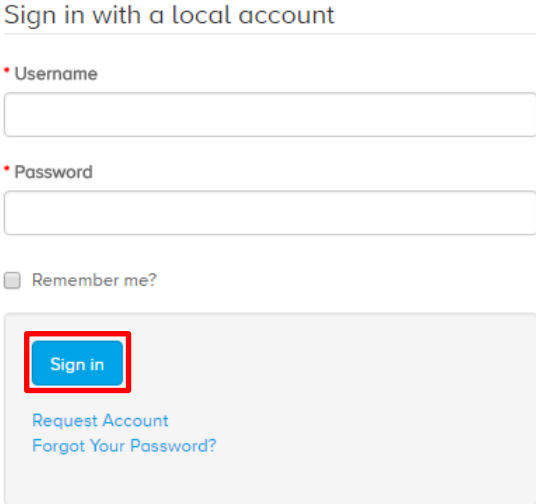
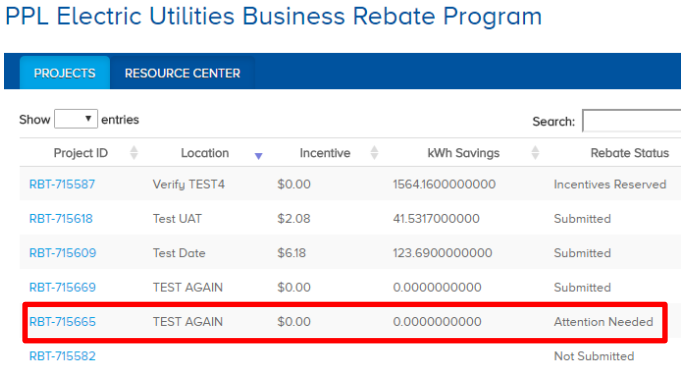
## Web Portal: Fixing Errors

Program:	PPL Electric Utilities
Applies to:	Trade Allies
Prerequisites:	<a href="#">PORTAL REGISTRATION</a> or <a href="#">REBATE APPLICATION</a>
Date:	6/2/2016

### Introduction:

When your rebate application is submitted to the program, processed, and it cannot be approved, the rebate status will change from “In Process” to “Attention needed.” Only measure-related errors will be displayed in the portal. All other errors, for example, incorrect or incomplete documentation uploaded, will not be displayed in the web portal. If you are unable to identify the error please contact the program for assistance.

# Fixing Errors

Steps	Instructions	Illustrations																																			
18	Click <a href="#">REQUEST ACCOUNT</a> .																																				
19	19.1 Click on the <a href="#">REBATE ID</a> number for the project that is displaying the rebate status <a href="#">ATTENTION NEEDED</a> .	 <table border="1"> <thead> <tr> <th>Project ID</th> <th>Location</th> <th>Incentive</th> <th>kWh Savings</th> <th>Rebate Status</th> </tr> </thead> <tbody> <tr> <td>RBT-715587</td> <td>Verifu TEST4</td> <td>\$0.00</td> <td>1564.1600000000</td> <td>Incentives Reserved</td> </tr> <tr> <td>RBT-715618</td> <td>Test UAT</td> <td>\$2.08</td> <td>41.5317000000</td> <td>Submitted</td> </tr> <tr> <td>RBT-715609</td> <td>Test Date</td> <td>\$6.18</td> <td>123.6900000000</td> <td>Submitted</td> </tr> <tr> <td>RBT-715669</td> <td>TEST AGAIN</td> <td>\$0.00</td> <td>0.0000000000</td> <td>Submitted</td> </tr> <tr> <td>RBT-715665</td> <td>TEST AGAIN</td> <td>\$0.00</td> <td>0.0000000000</td> <td>Attention Needed</td> </tr> <tr> <td>RBT-715582</td> <td></td> <td></td> <td></td> <td>Not Submitted</td> </tr> </tbody> </table>	Project ID	Location	Incentive	kWh Savings	Rebate Status	RBT-715587	Verifu TEST4	\$0.00	1564.1600000000	Incentives Reserved	RBT-715618	Test UAT	\$2.08	41.5317000000	Submitted	RBT-715609	Test Date	\$6.18	123.6900000000	Submitted	RBT-715669	TEST AGAIN	\$0.00	0.0000000000	Submitted	RBT-715665	TEST AGAIN	\$0.00	0.0000000000	Attention Needed	RBT-715582				Not Submitted
Project ID	Location	Incentive	kWh Savings	Rebate Status																																	
RBT-715587	Verifu TEST4	\$0.00	1564.1600000000	Incentives Reserved																																	
RBT-715618	Test UAT	\$2.08	41.5317000000	Submitted																																	
RBT-715609	Test Date	\$6.18	123.6900000000	Submitted																																	
RBT-715669	TEST AGAIN	\$0.00	0.0000000000	Submitted																																	
RBT-715665	TEST AGAIN	\$0.00	0.0000000000	Attention Needed																																	
RBT-715582				Not Submitted																																	

Edit Project

20

20.1 Click [EDIT PROJECT](#).

## Supporting Documents

File Name

Invoice.docx

## Installed Energy Efficient Measures

Measure Type ↑	Estimated Incentive	kW Savings	kWh Savings
Air Tanks for Load / No Load Compressors:6424	\$0.00	0.0000	0.0000

21

21.1 Confirm account number is correct and click [NEXT](#).

Contractor

B & B Builders Inc.

PPL Electric Utilities

Electric Account Number \*

0123456789

Next

22

22.1 Confirm **APPLICANT, CONTACT, PAYMENT, LOCATION, AND PROJECT INFORMATION** are correct and click **NEXT**.

### Applicant and Contact Information

#### Applicant Information

Business Name \*

Tax Status \*

Taxpayer ID # (SSN/FEIN)

#### Business Address

Street Address \*

Street Address 2

City \*

State \*

Zip Code \*

#### Contact Information

First Name \*

Last Name \*

Business Phone \*

Mobile Phone

Email \*

#### Contact Address

Street Address \*

Street Address 2

City \*

23

23.1 Confirm **BUSINESS and CONTRACTOR PROJECT CONTACT** information are correct and click **NEXT**.

Please identify the contracting company who performed the work.

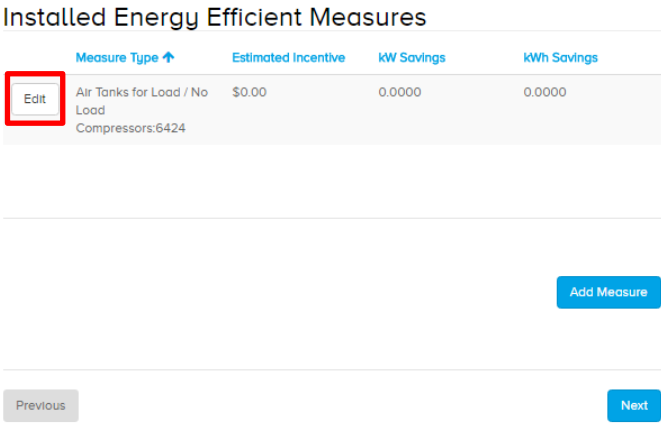
Business Name

#### Contractor Project Contact

Contractor First Name \*

Contractor Last Name \*

Business Phone \*

<p>24</p>	<p>24.1 Click <a href="#">EDIT</a>.</p>	
<p>25</p>	<p><b>Installed Measure:</b> <a href="#">MEASURE VALIDATION RESULTS</a> box will display the error(s) for example, “<i>Weather Zone on Location must be Allentown, Erie, Harrisburg, Pittsburgh, Williamsport, Philly, or Scranton.</i>”</p> <p>25.1 Is the field containing an error displayed on the current page?</p> <p><b>YES:</b> click on the field, enter the appropriate information, and click <a href="#">UPDATE</a>.</p> <p><b>NO:</b> Locate the page(s) containing the error(s) by using <a href="#">BACK/PREVIOUS</a> buttons to go back and <a href="#">UPDATE/NEXT</a> buttons to move forward.</p>	<p>Disregard the following <a href="#">MEASURE VALIDATION RESULTS</a> (errors) as they must be fixed by the program.</p> <ul style="list-style-type: none"> <li>▪ CCV verified on utility account must be yes</li> <li>▪ Contractor signature date on project desired</li> <li>▪ Customer signature date on project desired</li> <li>▪ Customer signature on project must be yes</li> <li>▪ Enter premise number on premise</li> <li>▪ Normalized annual heating load on premise desired</li> </ul>



## Edit Installed Measure

Equipment Type

Install Date \*

Quantity \*

Facility Type \*

Occupancy Hours \*

Horsepower \*

Measure Validation Results

Weather Zone on Location must be Allentown, Erie, Harrisburg, Pittsburgh, Williamsport, Philly, or Scranton

26

27.1 Confirm that **INSTALLED MEASURE** information is correct and click **NEXT**.

27

## Installed Energy Efficient Measures

	Measure Type ↑	Estimated Incentive	kW Savings	kWh Savings
<input type="button" value="Edit"/>	Air Tanks for Load / No Load Compressors:6424	\$50.00	0.4976	15,897.2600

## Upload your documentation

Don't forget to provide the necessary documentation! (hint, we cannot process your application without it.)

Documentation includes: Itemized invoices, equipment specifications, engineering reports, modeling output, photographs, W-9 signed by company receiving the incentive payment (Name, must match Payee), Copy of recent PPL Electric Utilities bill for installation address

Select documents to upload from your device using the Upload button below.

Supported File formats: PDF,PNG,JPG,JPEG,BMP,XLS,CSV,XLSX,DOCX,DOC  
Max file size (MB): 50

28

28.1 Confirm that the necessary documentation has been uploaded and click **NEXT**.

29

29.1 Confirm the information listed is correct.  
 If information is not correct, click [PREVIOUS](#) and update information.

29.2 After reading the program terms and conditions, check box below [ACKNOWLEDGEMENT](#).  
 Click [SUBMIT](#).

### Installed Energy Efficient Measures

Measure Type ↑	Estimated Incentive	kW Savings	kWh Savings
Air Tanks for Load / No Load Compressors:6424	\$50.00	0.4976	15,897.2600

### Terms and Conditions

In exchange for the receipt of any incentive payments from PPL Electric Utilities for which the applicant may be eligible, the applicant:

1. Understand that all customers who receive electricity via the PPL distribution network are eligible to apply for these incentives, regardless of the electric generation supplier from which the customer has

### Acknowledgement

I have read and understand the program requirements, measure specifications, and Terms and Conditions and Final Application Agreement set forth in this application (collectively, the "Requirements") and agree to abide by the Requirements. Furthermore, I concur that I must meet all eligibility criteria in order to be paid under this program.

Previous

Submit

30

You will now see your confirmation notice and [PROJECT TRACKING ID](#):

30.1 Use this information to track the progress of your application.

Note. Your application will move from [ATTENTION NEEDED](#) status to [IN PROCESS](#) and can no longer be edited.

### Success!

Congratulations on taking the first step toward energy and cost savings for your business!

Now what?

- 1) A Program representative will review your application
- 2) Pre-construction visit may be needed. A program representative will contact you.
- 3) A Program representative will provide you a notice funds have been reserved
- 4) You (or your contractor) will complete the installation of the equipment.
- 5) You need to log back in, update the construction end date, edit previously submitted measures, and upload your final documentation.
- 6) A program representative will review your final application. Post-construction visit may be needed. A program representative will contact you.
- 7) Your rebate check will be issued.

Project Tracking ID  
RBT-715665