Agenda

Topic	Duration	Presenter(s)
1. BEETS Overview	5 mins	Melissa Podeszwa, BEETS Customer Rep
2. Project Update & Rollout Plan	5 mins	Adam Morse, BEETS Project Lead
3. Support Resources	5 mins	Jen Mancke, BEETS Change Manager
4. What's Changing?	10 mins	Melissa Podeszwa, BEETS Customer Rep
5. IM Update	5 mins	Corinne Mauck, IM Coordinator
6. BEETS Demo	30 mins	Adam Morse, BEETS Project Lead Mike Palmer, BEETS COTR Rep Melissa Podeszwa, BEETS Customer Rep
7. Q&A	30 mins	All

BEETS Overview

BEETS

BPA Energy Efficiency Tracking System

Why BEETS?

BPA's current EE Reporting solution, IS 2.0, must be retired as the technology is no longer supported. Additionally, IS 2.0 lacks data visibility for customers, has limited workflow capability, and requires a significant amount of cross-system integrations that are challenging to manage.

BEETS, the new replacement system, will be released in fall 2022 and will improve BPA's energy-efficiency invoicing and reporting processes by providing:

- Automated workflows and data verification checks to help expedite processing

- Self-service, on demand reporting for customers

- Visual dashboards with visibility into application progress, budget and payments

- Ability to invoice at utility's convenience

- Centralized data across application submittal, invoicing, and performance payments

Integrated system allowing visibility into the process from submittal through payment.

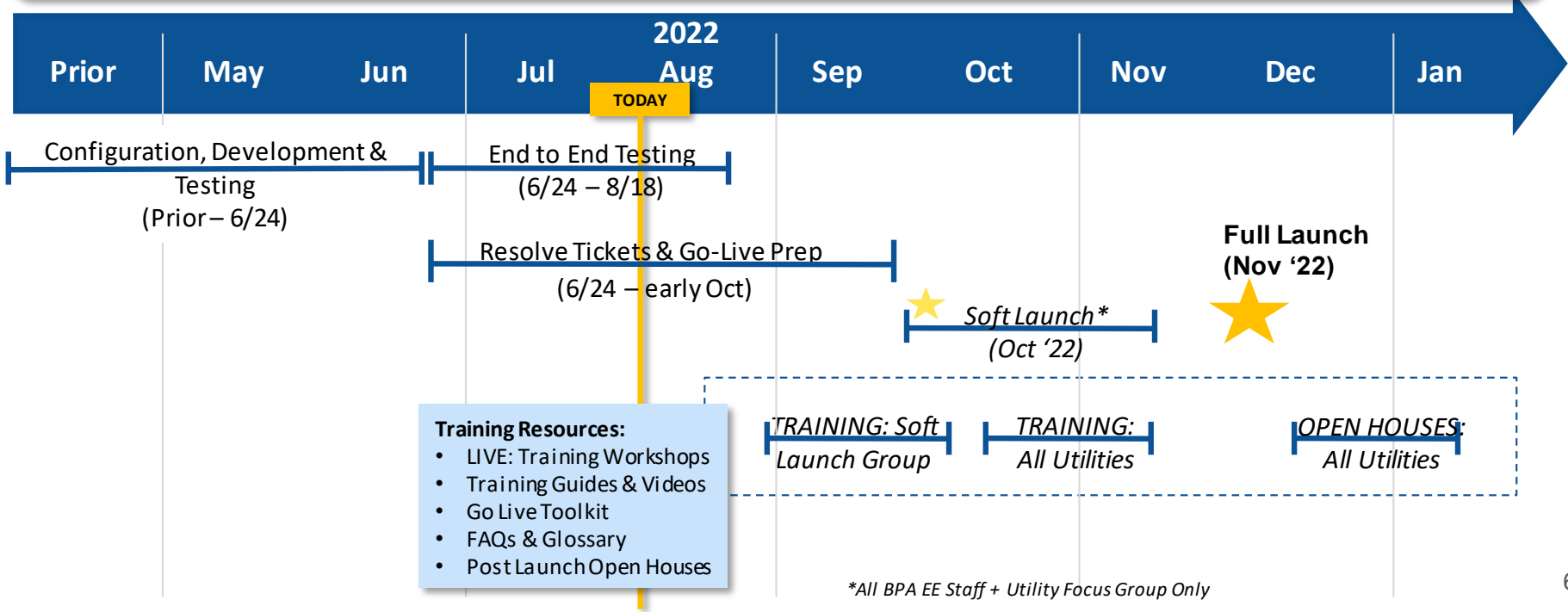Increased Visibility through Self-Service Reports and Dashboards

Expedited Processing through Automated Workflows & In System Approvals

4

Project Update & Rollout Plan

BEETS
BPA Energy Efficiency Tracking System

Project Update & Rollout Plan

Currently in Week 5 end-to-end testing, with the Utility Focus Group joining next week. Dashboard development and financial integration work continues, but no show stoppers. **On Track to have all utilities transitioned to BEETS by end of CY '22**!

2022

Prior	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan

TODAY

Configuration, Development & Testing
(Prior – 6/24)

End to End Testing
(6/24 – 8/18)

Resolve Tickets & Go-Live Prep
(6/24 – early Oct)

Full Launch
(Nov '22)

Soft Launch*
(Oct '22)

Training Resources:
- LIVE: Training Workshops
- Training Guides & Videos
- Go Live Toolkit
- FAQs & Glossary
- Post Launch Open Houses

TRAINING: Soft Launch Group

TRAINING: All Utilities

OPEN HOUSES: All Utilities

*All BPA EE Staff + Utility Focus Group Only

6

Customer Support Resources

Who do I go to with questions?

Energy Efficiency Reps (EERS), will serve as your primary contact, but feel free to reach out to any member of the EE Customer Service Team, or email BEETS@BPA.gov to reach the project team directly.

BEETS Resources

- **BEETS Page on BPA.gov** : BEETS info, Project Updates, FAQs (NEW!)

- **BEETS Landing Page (COMING SOON!)**: System Access, Training Session Announcements, Training Materials

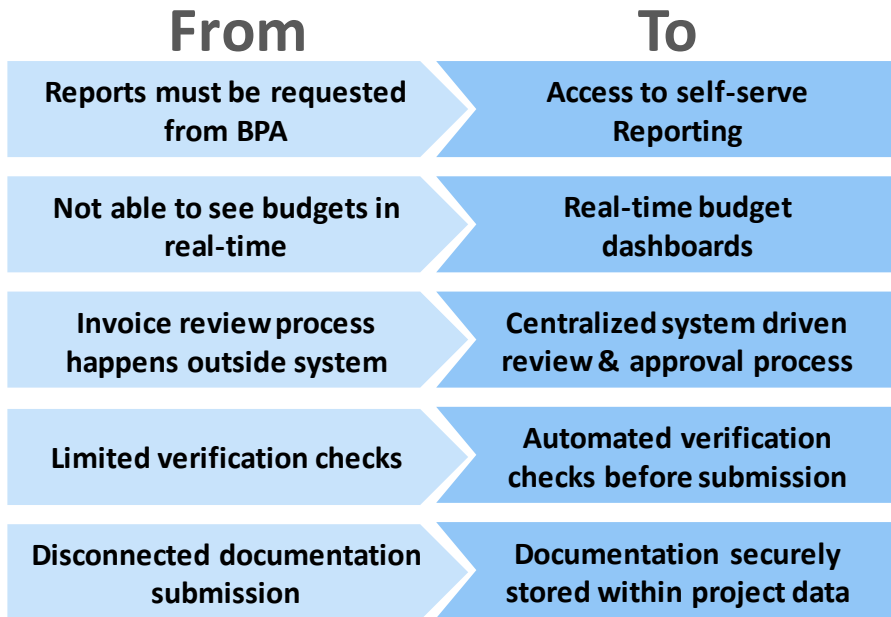- **Live Training Sessions and Demos** will ramp up 4 – 6 weeks ahead of Go Live

What's Changing?

BEETS

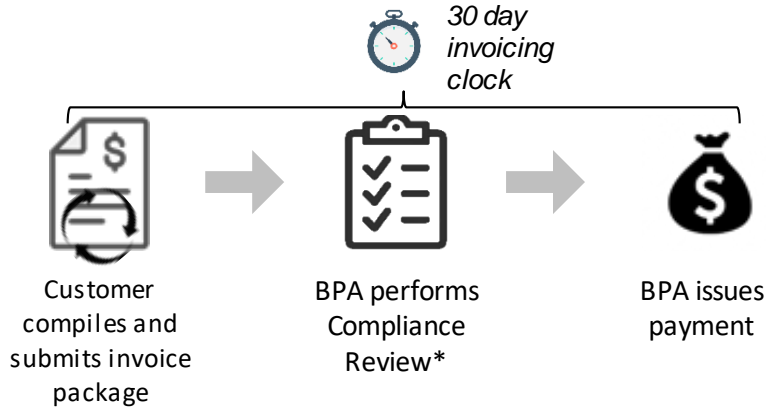**B**PA **E**nergy **E**fficiency **T**racking **S**ystem

Key Improvements

Multiple systems comprise an energy efficiency software solution that **lacks visibility, automated workflow, and cross-system integration**.

From	To
Reports must be requested from BPA	Access to self-serve Reporting
Not able to see budgets in real-time	Real-time budget dashboards
Invoice review process happens outside system	Centralized system driven review & approval process
Limited verification checks	Automated verification checks before submission
Disconnected documentation submission	Documentation securely stored within project data

BEETS
BPA Energy Efficiency Tracking System

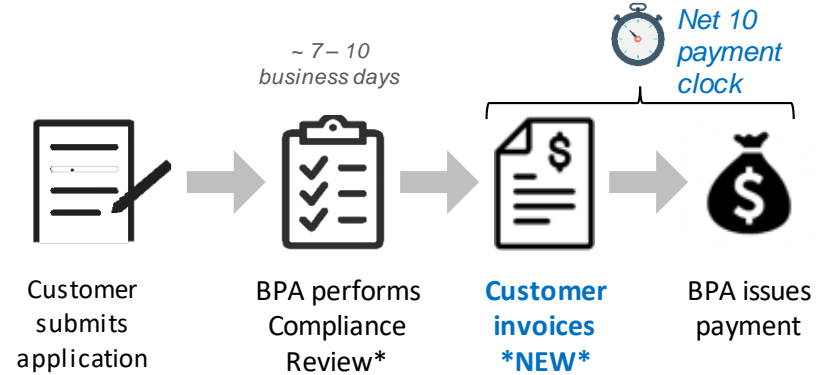**Single system** to submit, manage, and track our energy efficiency process, from submission to invoicing.

What's Changing? – EE Reporting Process

Current

Future

30 day invoicing clock

Customer compiles and submits invoice package → BPA performs Compliance Review* → BPA issues payment

Customers always get paid at 30 days

~ 7 – 10 business days

Net 10 payment clock

Customer submits application → BPA performs Compliance Review* → **Customer invoices *NEW*** → BPA issues payment

Customers could get paid in LESS than 30 days

Oversight performed if applicable

What's Changing? – Performance Payments

Current	Future

Automatic, but not flexible:

- Automatic Payment or Opt Out

- One bucket of funding

- Same Invoice for EEI and Performance Payments

More steps, but more flexible:

- Customers control if, when and how much is paid

- Separate EEI & Performance Payment buckets

- Separate invoices for EEI and Performance Payments

11

What's Changing? – Implementation Manual

Specific Changes

- **Introduction (1):** Minor changes to improve clarity

- **Funding (2):** Rollover = Carryover; Bilateral transfer = Implementation budget transfer; BEETS updates; new allowance for partial self-funding

- **General Requirements (3):** Updated to reflect BEETS invoicing and reporting requirements

- **Custom Projects (4):** Updated to reflect reporting requirements in BEETS; small correction to calculation for incremental new construction costs; changes to Option 2 Custom Projects cost effectiveness requirements

Overall Changes

- Interim reporting requirements pages will be removed throughout the IM

- Many forms going away in favor of limited data collection in BEETS

- Minor corrections/clarifications

- HVAC Updates – DOE labeling

Thank you to our wonderful Utility Focus Group members!

UFG Member	Organization
Eric Miller	Benton REA
Wade Carey	Central Lincoln PUD
Debbie DePetris	Clark PUD
Trevor Frick	Clark PUD
Miranda Boutelle	Central Lincoln/ESG
Tara Maynard	Grays Harbor PUD
Jason Bird	Idaho Falls Power
Wid Ritchie	Idaho Falls Power
Anita Clever	Klickitat PUD
Renee Fiedler	Peninsula Light
Brandy Neff	PNGC
Anne Larrabee	Tacoma Power

Also huge thank you to the <u>over 40 BPA employees and contractors</u> who are participating in the BEETS testing phase!

BEETS Demos

BEETS
BPA Energy Efficiency Tracking System

BEETS Glossary

- **Application**: Reported measure/project

- **Equipment** = Measure

- **Invoice:** Request for reimbursement (and/or documentation of self-funding); now a separate invoicing step in BEETS

- **Program**: Types of reported measures/projects that share common reporting requirements, calculations, and business rules (i.e. group of UES related measures now encompass the UES program)

- **Workflow**: Sequence of tasks included in the application process from submittal to invoicing where data is passed between users and/or systems.

BEETS Demo

- **BEETS Dashboard**

- **UES Template Changes and Upload**

- **Revisions Required & Oversight Demo**