

Smart Energy Provider (SEP) Online Application and Designation System

Primary User Guide

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Introduction

The Smart Energy Provider (SEP) program is a best practices designation for the 'greener' side of utility operations. The SEP program recognizes utilities that show commitment to and proficiency in energy efficiency, distributed energy resources, environmental and sustainability programs, and customer communication and education.

Getting Started

System Requirements

The web application is designed for [Mozilla Firefox 31.0](#) or higher and [Google Chrome 35.0](#) or higher. Both browsers are available for free download by following the links above. Additional web browsers (such as Internet Explorer 11.0 or higher) may work, but have not been tested and are not supported. Your computer should also meet the minimum system requirements provided by the manufacturer of the browser you are using.

The web application will perform best on computers with a high-speed internet connection similar to digital subscriber line (DSL), cable, or faster.

Launching the Web Application

To get started using the Smart Energy Provider (SEP) Application & Designation System, you will first need to request your utility be added to the system by emailing SEP@PublicPower.org.

Once you have an account, you can access the SEP Application & Designation System by going to:

sep.publicpower.org

Logging In

Logging-in for first time

When you are added to the SEP Application and Designation System, you will receive a confirmation email (“Welcome to the APPA Smart Energy Provider Designation”) listing your username and URL to login.

Username:

Your username is automatically generated for you, and will be your “LastnameFirstname”. Usernames are not case sensitive.

URL:

After selecting the URL from the email, a new browser window will open, and you will be prompted to set a password.

Password Generation:

Please note that passwords **are** case sensitive.

Logging in

Username:

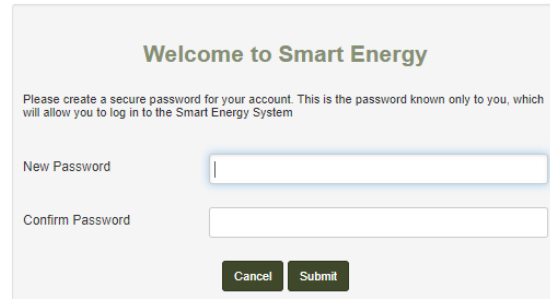
Your username is automatically generated for you, and will be your “LastnameFirstname”. Usernames are not case sensitive.

Password:

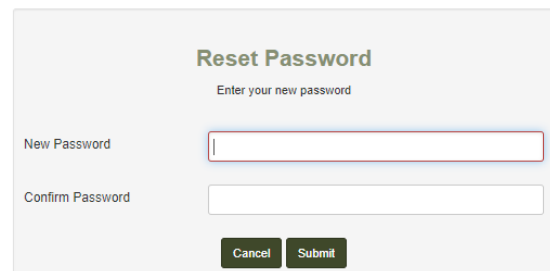
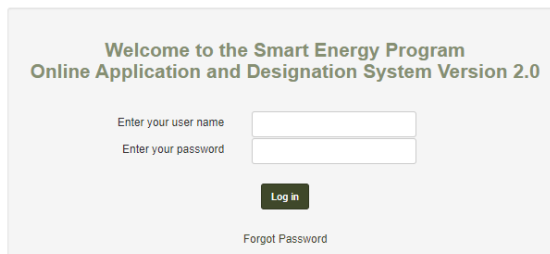
Your password is case sensitive. If you can't remember your password, select “forgot password”.

Forgot Password

Enter your user name and click “submit”. Instructions to reset your password will be emailed to you.



Login Screen for first time use



Navigation - Header

The Header at the top of the web application contains the SEP logo and site navigation.

The SEP Logo:

Will take you back to the landing page

Navigation:

Home

- Landing Page

Profile

- My Profile
- Change Password

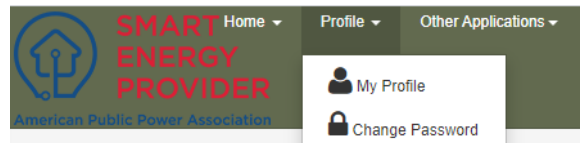
Other Applications

- RP3



Change Password

Once you login to the application, you can change your password by going to: Profile > Change Password



My Profile

You can edit any personal information (title, address, phone, email, etc) by editing your profile

You can change your profile by selecting: Profile > My profile

The image shows a 'Details' form for a user profile. The form is divided into two main sections. The left section contains personal information fields: Prefix (dropdown), First Name (text, value: Test), Last Name (text, value: 2021), Title, Address 1, Address 2, City, State (dropdown), Zip Code, Office Phone, and Other Phone. The right section contains login and contact information: Login (text, value: 2021Test), Last Login (text, value: 11/30/2020 4:57:29 PM), Email (text, value: 2021Test@publicpower.org), Company, Preferred Methods of Contact (checkboxes for Phone, Email, U.S. Mail), Best Time to Contact (dropdown), and Is Active (radio buttons for Yes and No, with Yes selected). A 'Save' button is located in the top right corner of the form.

Landing Page

When you login to the application, you will see three options.

Utility:

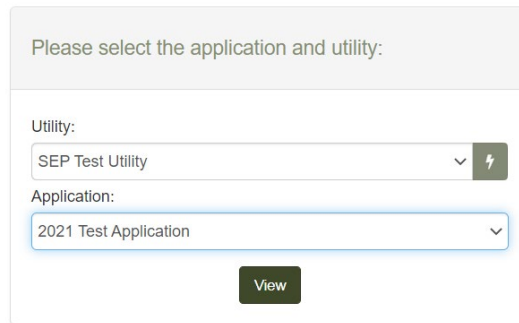
Select the utility you want to complete an application for. If you only work for one utility, you will only have one option.

Lightning Bolt:

If you are a Primary User, the Lightning Bolt will take you to the “Edit Utility” page. If you are a General User you will not be able to select the Lightning Bolt.

Application:

Select the application you need to complete. All previously completed applications will also be accessible here. Applications are assigned to your utility by APPA.



Please select the application and utility:

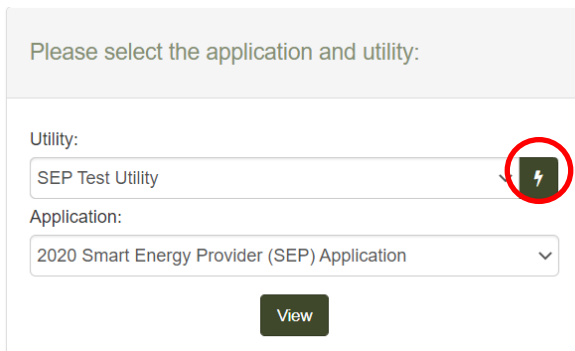
Utility:
SEP Test Utility [Lightning Bolt icon]

Application:
2021 Test Application [Dropdown arrow]

View

Edit Utility

To edit your utility profile, from the landing page click the “lightning bolt” symbol.



Please select the application and utility:

Utility:
SEP Test Utility [Lightning Bolt icon]

Application:
2020 Smart Energy Provider (SEP) Application [Dropdown arrow]

View

Utility Information

Details Save

Name	SEP Test Utility	APPA Member?	Yes	APPA Date	
Aptify ID		Status - Active?	Yes	Status Comments	You can leave any comments on your APPA membership status here!
Address 1	2451 Crystal Drive, Suite 1000	Utility Size	Medium Member	EIA ID	
Address 2					
City	Arlington				
State	Virginia				
Zip Code	22202				
Main Phone					
Web Site					
Number of Customers	25000				

The top half of the edit utility page contains the contact information for your utility, as well as a few other important pieces of information.

Important Information:

- Please keep the number of customers as up-to-date as possible; the number of customers will determine your “utility size” which is assigned to you by APPA Staff.
- You **cannot** edit: Aptify ID, APPA Member, Status – Active, APPA Date, and Utility Size

Users

Primary User

There is only **one** Primary User per utility. This user is the primary point of contact for the SEP application and is the only user who has the ability to:

- Submit an Application
- Assign questions in an application
- Edit Utility information
- Add/Delete other users
- Receives communications regarding: notification of designation, requests for more information, and answers to questions

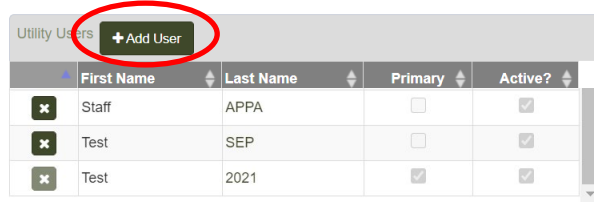
Utility Users	First Name	Last Name	Primary
<input type="checkbox"/>	Jane	Doe	<input type="checkbox"/>
<input type="checkbox"/>	John	Smith	<input type="checkbox"/>
<input type="checkbox"/>	User	APPA	<input checked="" type="checkbox"/>

When viewing the list of users on the “Edit Utility Page” you can tell which user is the primary by the “check box” next to their name.

If you need to change the primary user of your utility please contact SEP Staff at SEP@PublicPower.org and identify who the new primary user should be

Adding New Users

On the “Edit Utility” page, Under **Utility Users** click “Add User”



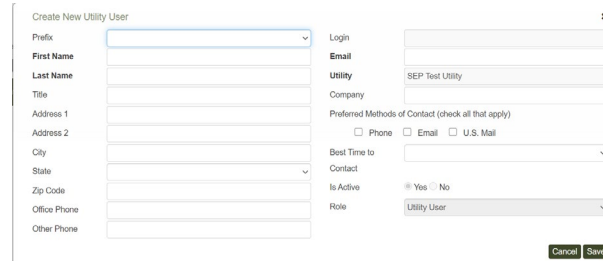
The screenshot shows a table titled "Utility Users" with a "+ Add User" button circled in red. The table has columns for First Name, Last Name, Primary, and Active?. There are three rows of data:

	First Name	Last Name	Primary	Active?
<input type="checkbox"/>	Staff	APPA	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Test	SEP	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Test	2021	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Fill out the contact information for the user you want to add to your utility

Important Information:

- First Name, Last Name, and Email are required to create a new user.
- You **cannot** edit: Utility Name, Active Status, and Role.



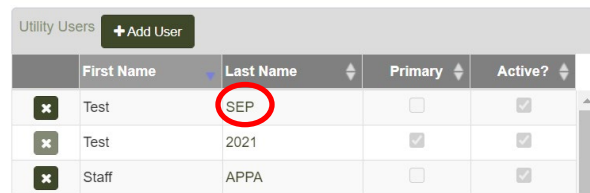
The screenshot shows the "Create New Utility User" form. It includes fields for Prefix, First Name, Last Name, Title, Address 1, Address 2, City, State, Zip Code, Office Phone, and Other Phone. There are also fields for Login, Email, Utility (set to "SEP Test Utility"), Company, Preferred Methods of Contact (Phone, Email, U.S. Mail), Best Time to Contact, Is Active (radio buttons for Yes/No), and Role (set to "Utility User"). "Cancel" and "Save" buttons are at the bottom right.

After you click “save” an email will be sent to the new user allowing them to login to the system and set up their account.

Editing Users

On the ‘Edit Utility’ page, under **Utility Users** there will be a list of users.

Click on a User’s last name and it will take you to their User Profile.



The screenshot shows the "Utility Users" table with the "Last Name" column circled in red. The table has columns for First Name, Last Name, Primary, and Active?. There are three rows of data:

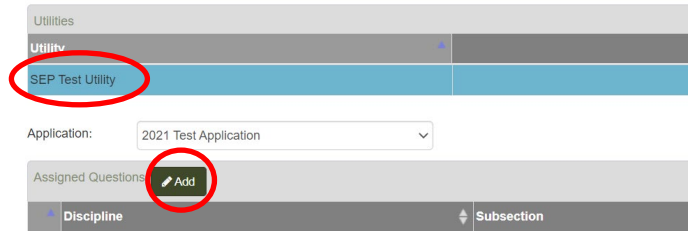
	First Name	Last Name	Primary	Active?
<input type="checkbox"/>	Test	SEP	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Test	2021	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Staff	APPA	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Assigning Application Questions

As a Primary User you are automatically assigned to answer every question in the application. However, Primary Users can also assign questions to another user from the User’s profile page.

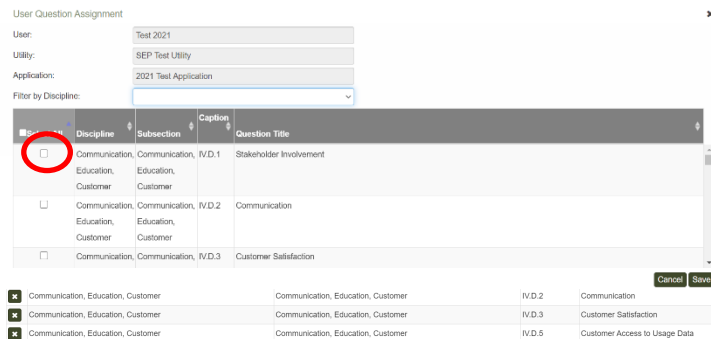
Important information: You can also assign users to a question, when viewing the Application itself – go to the ‘*Question Preview > Adding Users to Question*’ section of this guide for more information.

At the bottom of the 'Edit Utility User' Page, select your utility (it will highlight the utility in blue, as shown to the right).



Then choose the application that you want to assign them a question on (at this time, you will only have one application – in the future all application assigned to your utility will be displayed).

Next, click the 'Add' button next to 'Assigned Questions'. From the pop-up, you can select all the questions you want to assign to that user by checking the box to the left of the question.



After you press save, a list of all the questions that user is assigned to will now be displayed.

Applications

The final section on the 'Edit Utility' page is the applications section. This area offers an overview of all the applications that have been assigned to your utility.

Application	Phase	Determination	Score	Expires
2021 Test Application	Open		In-Progress	

The fields included in the application overview are:

Application Lists the Application Name – it will include the year in which the application was assigned

Phase There are 6 phases that an application can be in:

- **Open:** You can currently edit your answers to an application
- **Submitted:** Your application has been submitted and you can no longer edit your answers but grading has not begun
- **Grading:** Grading is in progress
- **Determination:** Grading has been completed – you can now see your final score/designation level
- **Closed:** If the application period is closed, and you haven't completed your application.

- **Inactive:** If you've told APPA that you no longer are interested in completing an application, it will be marked inactive.

Determination This will list what designation level you received for your application:

Not Designated: Less than 70% of possible points

Designated: Greater than or equal to 70% of the possible points

Score How many points you received on the application

Expiration The date your designation expires

Application Page

To access your application, from the landing page click the “View” symbol.

Please select the application and utility:

Utility:
SEP Test Utility

Application:
2021 Test Application

View

Application Dashboard

Status Return to Landing Page

Phase: Open
Submitted: No

Question Status

- Unanswered:
- In-Progress: 100%
- Submitted:

Utility: SEP Test Utility
Utility Size: Medium Member

The top part of the application is the “Application Dashboard” and provides you an at-a-glance overview of how your application is progressing.

Phase:

There are 6 phases an application can be in:

- **Open:** You can currently edit your answers to an application

Status

Phase: Open

Submitted: No

- **Submitted:** Your application has been submitted and you can no longer edit your answers, but grading has not begun
- **Grading:** Grading is in progress
- **Determination:** Grading has been completed – you can now see your final score/designation level
- **Closed:** If the application period is closed, and you haven’t completed your application.
- **Inactive:** If you’ve told APPA that you no longer are interested in completing an application, it will be marked inactive.

Submitted:

This status refers to whether or not the application has been submitted for grading. There are two statuses that can appear here:

No: While you are still working on the application (i.e. answering questions), this status should say “No”.

Yes: Once you have completed the application (i.e. have answered all questions), and primary user has pressed “submit application”, this status will say “Yes”.

Status

Phase: Open

Submitted: No

Question Status

The question status helps you keep track of your utility’s progress in answering all the questions, as shown via progress bars. More information on Question Status’ is given in the “Question Preview” section of this guide.

Question Status

- ✘ Unanswered:
- ✓ In-Progress: 100%
- ✓ Submitted:

Important Information:

The status of each question is reflective of the utility as a whole, and not just your own individual progress on questions.

Unanswered: Questions are “unanswered” if you’ve never pressed “save” while answering a question. This means that, even if you’ve gone through and looked at all the questions, 100% of the questions haven’t had an answered saved, so they are 100% unanswered.

In-progress: Questions are “in-progress” if you’ve pressed saved on an answer for a question, but you haven’t completed answering the question.

Submitted: Questions change to “submitted” status from “in-progress” after a user “approves” the answer to a question. *All questions must be “submitted” in order to submit your application.*

Utility

This will display the name of the Utility’s Application that you are currently working on. For multi-utility users, please check that you are working on the correct Utility’s application before answering questions.

Return to Landing Page

Utility: SEP Test Utility

Utility Size: Medium Member

Utility Size

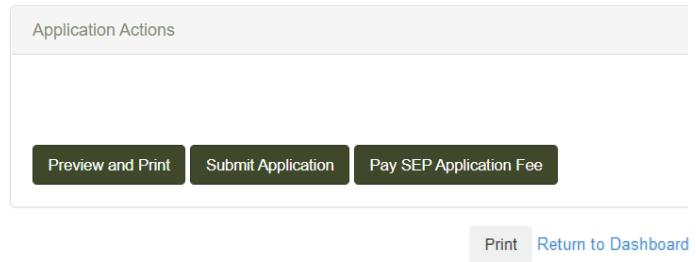
SEP applicant utilities are divided into three size categories based on your number of customers. If your utility size is incorrect, please contact APPA Staff at SEP@PublicPower.org and we will change your profile accordingly.

- **Small:** Less than 5,000 meters
- **Medium:** 5,000 - 30,000 meters
- **Large:** 30,000 and more meters

Application Actions

The second section of the application page is called “Application Actions”.

There are two actions you can take from this section: Preview/Print your application or submit the Application.



Preview and Print

The “preview and print” page will display the entire SEP application, including all questions, any responses you’ve completed, and will list any attachment file names you’ve added. (To view the complete attachment, you will need to go to the individual question and preview it there).

After Designation

After grading has been completed, you can view your entire application, as well as all grades for each question, and any comments from the SEP Review Panel in the preview screen.

2021 Test Application
Utility: SEP Test Utility
Application Status: Open
Application Due:

Discipline: Utility Demographics Subsection: Employee Demographics

Question 0.0.0.0:

**This is an informational question only.*

Please enter a value for each category listed below:

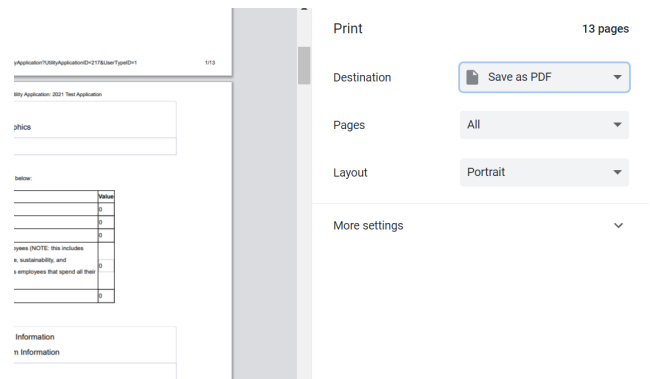
Utility Demographics	Value
# of residential customers served:	0
# of commercial customers served:	0

Saving a Copy of Your Application

At this time, our software does not support saving a pdf copy of your application, however you can save a pdf version of the preview screen using the Google Chrome Browser.

To do so, click Print on the left corner of the preview.

On location Destinations, select “Save as PDF”



Submit Application

When you all your answers are 100% complete, the Primary User will be able to submit your application. You will be given a pop-up screen where you will verify that all information is accurate to the best of your ability.

If you haven't completed every question you will not be able to submit the application, and you will receive an error message telling you how many questions you have left.

If you are not the Primary User, you will not be able to submit the application. Only one user per utility is given that ability to ensure the application is complete.

Question Table

The screenshot shows a 'Question Table' interface. On the left, there is a 'Table of Contents' button. The main area contains several filter dropdowns: 'Discipline', 'Subsection', 'Question Text', 'RFI Status', 'Assigned To', and 'Question Status'. Below the filters are 'Search' and 'Clear' buttons, and a 'Filter:' input field. The table below lists questions with columns for Discipline, Subsection, Caption, Question Title, Question Status, and Disc.

	Discipline	Subsection	Caption	Question Title	Question Status	Disc
→	Utility Demographics	Employee Demographics	0.0.0	Utility Employee Demographics	✓ In Progress	
→	Overarching Program Information	Overarching Program Information	I.A.1	Goals and Objectives	✓ In Progress	
→	Overarching Program Information	Overarching Program Information	I.A.2	Research and Development	✓ In Progress	
→	Overarching Program Information	Overarching Program Information	I.A.3	Financing Options	✓ In Progress	

The bottom section of the Application Page displays a search feature and table listing all questions in the SEP application.

Application Question Search

You can find a specific question you want to work on, assign to another user, or review by filtering for specific criteria.

These are the search filters that you can apply:

Discipline These are the four disciplines that make up the SEP application:

- Overarching Program Information (Smart Energy Information)
- Energy Efficiency and Distributed Energy Resources
- Environmental and Sustainability
- Communication, Education, Customer

Subsection This only applies to RP₃ applications. Please disregard this filter.

Question Text This is a general text search to find a question based off any word included in the question text.

RFI Status This only applies to RP₃ applications. Please disregard this filter.

Assigned To Using this filter you can select one or more utility users that have been assigned to answer a question.

*Primary Users are automatically assigned to answer all questions.

Question Status There are 3 statuses that a question can be in:

Unanswered: Questions are '*unanswered*' if you've never pressed 'save' while answering a question. This means that, even if you've gone through and looked at all the questions, 100% of the questions haven't had an answered saved, so they are 100% unanswered.

In-progress: Questions are '*in-progress*' if you've pressed saved on an answer for a question, but you haven't completed answering the question.

Submitted: Questions change to '*submitted*' status from '*in-progress*' after a user '*approves*' the answer to a question. All questions must be '*submitted*' in order to submit your application.

Filter You can search for any text included in the question table below by typing it into the filter.

Important Information:

In order to clear the text filter, you must delete the text. Hitting the "clear" button will not remove this text.

Application Question Table

As indicated above, the search filters correspond to the variables displayed in the Question Table.

To select a question displayed in the table, click the *blue arrow* icon to the left of the question.

Discipline These are the four disciplines that make up the SEP application:

- Overarching Program Information (Smart Energy Information)
- Energy Efficiency and Distributed Energy Resources
- Environmental and Sustainability
- Communication, Education, Customer

Subsection This only applies to RP₃ applications. Please disregard this filter.

Caption The caption is used to number the questions in the application.

Question Title The question titles are unique names used to describe each question included in the application.

Question Status This will display what the status of each question is in your application, providing you an at-a-glance view of which questions you still need to work on, and which are already completed.

The question statuses are:

- Unanswered
- In-Progress
- Submitted

More details about question statuses are available in the “Question Preview” section of this guide.

Discussion If someone has left a comment in the discussion area of a question, this checkbox will be marked.

Points Available This column tells you how many points each question is worth.

Grade* **This column is not visible until after you application has been graded.*

After your utility’s application has been graded, and you have received notice of your designation status, this column will tell you how many points your utility received on each question.

Question Preview

You are the primary user for this utility. You may view, but not change this question.

Return to Dash

Discipline: Overarching Program
Information

Subsection: Overarching Program
Information

Status: *In Progress* Additional Instructions

Question I.A.1 :

Question Information

Above the question is displayed a few pieces of information to help you identify which question you are working on, what the status of the question is, and provide help to answer the question.

Discipline These are the four disciplines that make up the SEP application:

- Overarching Program Information (Smart Energy Information)
- Energy Efficiency and Distributed Energy Resources
- Environmental and Sustainability
- Communication, Education, Customer

Subsection This only applies to RP₃ applications. Please disregard this filter.

Status The status will automatically update as your progress on the question continues. When you first view the question, and you have not saved any work the status will be '*unanswered*'.

After you have saved any work to the question, the status will be '*in-progress*'.

Once you have submitted your completed answer, the status will be '*submitted*'.

Additional Instructions The additional instructions will provide you with help text for how to fill in your answer to a question, or how to troubleshoot problems you may have with saving an answer.

Help - “?” The “?” will take you to help text that tells you more information about what content to include in your answer to a specific question, how many points that question is worth, and what the panel is looking for in an answer.

This information is originally from the SEP Application Guide, which can be found at <https://www.publicpower.org/smart-energy-provider>.

If you have a question about the help text you want to ask APPA staff, use the '*Submit Question*' feature at the bottom of the help text pop-up.



Navigating Questions

- << Will take you to the very first question in the application.
- >> Will take you to the very last question in the application.
- Next** Will take you to the next question in the application. If you are on the last question of the application, “next” will not be visible.
- Previous** Will take you to the previous question in the application. If you are on the first question of the application, “previous” will not be visible.



Answering a Question

Depending on the type of question, you may be required to take a few different actions.

Most questions will require you to first select ‘yes’ or ‘no’.

Some questions may have additional requirements if you answer ‘yes’, including: selecting additional checkboxes, attaching an example, or providing an explanation. If you are unable to “approve” your answer, be sure to check that ‘yes’ or ‘no’ has been selected, and that any additional requirements have been met.

Import Response If you have previously submitted an application in the SEP online system, you may be able to import your previous answer.

In order to be able to import a previous answer, you must have been assigned the same question on the previous application.

When you click ‘*import response*’ you will be taken to a pop-up that will display any previous applications (if applicable) that your utility previously answered this question in.

By selecting an application, you can:

- View your previous answer
- View attachment file names
- See what score you earned on the question
- See any comments the SEP Review Panel left

After previewing your response, if you want to import that answer, including any attachments, select the application you want to import from and click ‘*import response*’.

Save Answers do not save automatically in this application system. In order to save any work-in-progress, be sure to press ‘save’ when you exit a question.

Approve* Pressing ‘approve’ changes the status of a question to ‘submitted’.

Disapprove* After a question is in ‘submitted’ status, to edit and save any modifications, you will first need to press ‘disapprove’ – this will change the question back to ‘in-progress’, enabling you to make modifications to the question again.

* *Approve & Disapprove* are **only** available to Primary Users

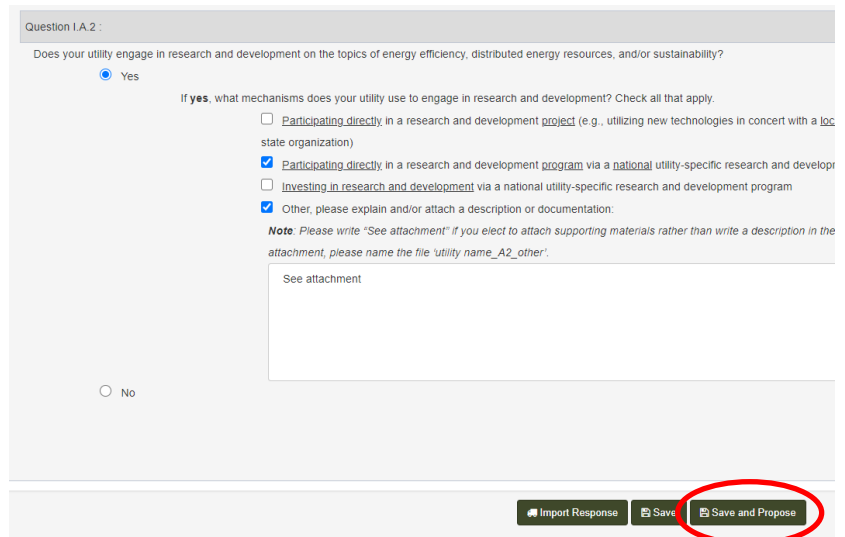
Multiple Users Answering a Question

This application system allows for multiple users to work on the same question at the same time. As a Primary User, you can assign as many users to a question as you want. Any work on a question that has been ‘saved’ will be visible to all users viewing that question, including attachments. Since all users assigned to a question are working on composing one answer together, the first user to hit ‘save and propose’ will lock in that answer for all other users – disabling any other users from continuing to make changes to the answer.

General User View

While General Users have the similar options to the Primary User for how to save an answer to a question, there is one significant difference. A General User **cannot** ‘approve’ their own answers to a question. Instead, a General User will see a button that says, ‘save and propose’ an answer.

When a User believes their answer is complete, they will ‘save and propose’ their answer, and the Primary User will receive an email notification that an answer has been proposed as the final response. At this point, the General User can no longer make any edits to their answer.

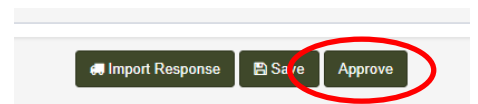


The screenshot shows a question titled "Question 1.A.2" with the text: "Does your utility engage in research and development on the topics of energy efficiency, distributed energy resources, and/or sustainability?". There are radio buttons for "Yes" (selected) and "No". Below the question, it asks "If yes, what mechanisms does your utility use to engage in research and development? Check all that apply." and lists four options: "Participating directly in a research and development project (e.g., utilizing new technologies in concert with a local state organization)", "Participating directly in a research and development program via a national utility-specific research and development program" (checked), "Investing in research and development via a national utility-specific research and development program", and "Other, please explain and/or attach a description or documentation." (checked). A note says: "Note: Please write 'See attachment' if you elect to attach supporting materials rather than write a description in the attachment, please name the file 'utility name_A2_other'." There is a text input field for "See attachment". At the bottom right, there are three buttons: "Import Response", "Save", and "Save and Propose" (circled in red).

Primary User View

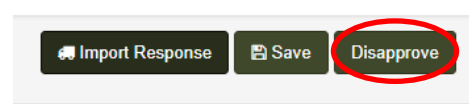
When the General User presses ‘save and propose’, the Primary User’s receipt of an email notification saying an answer has been proposed. The Primary User will review the response.

- If the response is good as is, the Primary User will select ‘Approve’. Then, the status of the question will change to *Submitted*.

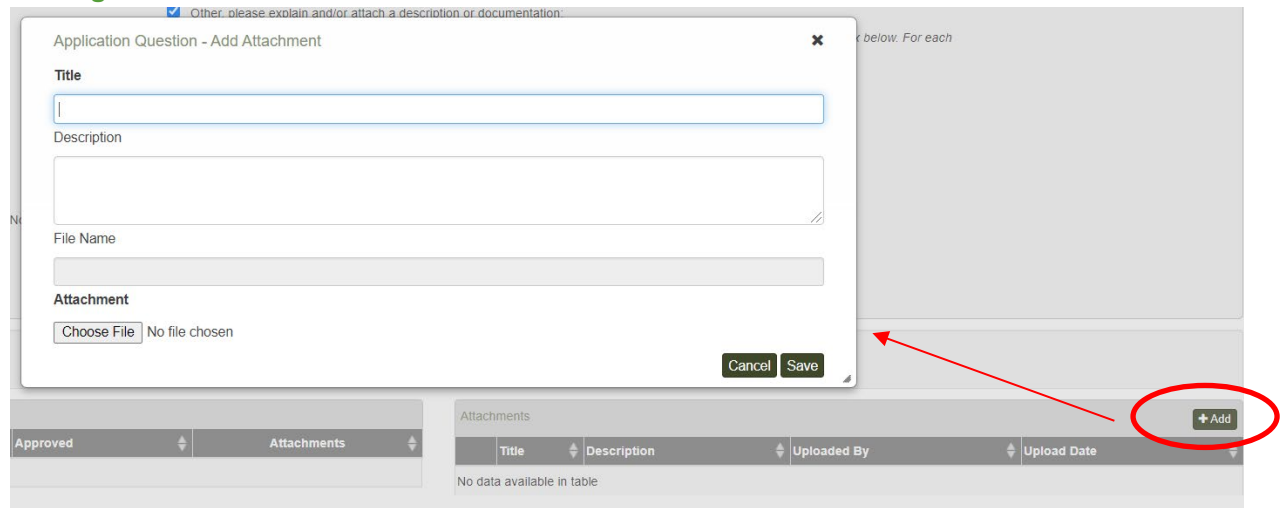


The screenshot shows the bottom right corner of the interface with three buttons: "Import Response", "Save", and "Approve" (circled in red).

- If the Primary User believes the answer needs to be changed, they will *disapprove* the response, and the Utility User can once again make edits to their answer and re-propose a final answer.



Adding Attachments



Below the question preview, is a table displaying all attachments for the question. To add an attachment, click the “add” button in the upper right-hand corner of the table.

Attachment file types supported by this software include:

- Word
- Excel
- PowerPoint
- PDF
- Images

Fields included in the upload form or attachment table are:

Title This should be the name of the file. Please name the file “**utility name_question number_checkbox name**” or “**utility name_question number_document title**”. This field is required to upload a document.

*This field is required to upload a document

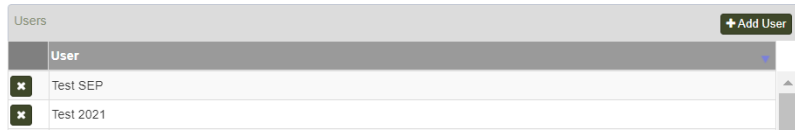
Description Although not required, the description field gives you an opportunity to provide any additional information to identify/describe the attachment. As mentioned earlier, a utility must provide specific page numbers for review if the attachment is a long document (more than 5 pages).

Uploaded By Displays the username of your utility user that added the file.

Uploaded Date Will display the date the document was first added to the application.

Adding/Removing Users to Question

Although all users can see all questions in the application, and answers in progress, only Users that have been added to a question by the Primary User can submit an answer to a question



Users		+ Add User
User		
x Test SEP		
x Test 2021		

Adding Users

Primary Users can add other users from their utility by selecting the “add” button in the upper right-hand corner of the Users Table. All Users belonging to the Utility will appear.

Users that are inactive or already assigned to a question will not be able to be added to the question.

Removing Users

Primary Users can also remove other Users from a question by selecting the “x” icon to the left of the Username in the User Table.

Discussion



Applicant Discussion				+ New Topic
Topic	Comments	User	Date	
No data available in table				

The discussion feature is for users to communicate with each other about how to answer a question. Every question has its own discussion thread enabling users to keep conversations associated with the question they are viewing.

To add to a topic to a discussion:

To add a new topic to the discussion table click the “add” button located in the upper right hand corner of the Discussion Table.

A pop-up will appear with the following fields:

Topic The topic is a brief subject line for what the comment you want to make is.

Comments Comments are where you write a more detailed description of the item you want to discuss.

To respond to a topic on the discussion:

You cannot comment directly on another user’s topic, but you can add another comment to the discussion table in response by following the instructions above.

Question Score & Comments

After grading is complete, and the Primary User has received notice of their utility's designation, all final scores and any comments by the panel will be visible on each question underneath the Users table

Grading	
Grading Status:	Graded
Final Grade:	4.00
Final Grade Notes:	

Technical Assistance

For any technical assistance needed contact SEP Staff at:

Email: SEP@PublicPower.org

Phone: 202-467-2931