

**Non-DEER review process
March 1, 2010 Meeting notes**

Custom measure/application review process:

The utilities each walked through for ED its internal utility process/steps from the time an application comes in to customer incentive payment. At a high-level, ED's understanding is that:

1. An application reviewer checks the application for completeness, and that the numbers are reasonable,
2. At various trigger points, there may be site inspections. These triggers may be an incentive dollar amount, energy savings estimate value, or simply questioning data or estimate reasonableness
3. Reviewer prepares a pre-installation report or project application report
4. Utility and customer signs project agreement
5. Customer notifies utility of project completion
6. Reviewer does a post installation inspection and prepares post installation report.
7. Payment is processed

ED understands that the utilities review all applications before payment is made and this includes Partnerships and 3rd Parties. However, not all applications will receive a pre and post.

In this meeting, the group agreed conceptually to the custom application review process ED drafted, but the utilities raised concerns about the details in its response to the ED draft. ED will take another stab at this draft document. ED reiterated that the purpose of the custom application review process document is to have agreement that:

1. A custom application review process will take place
2. That project applications will be provided to ED
3. A trigger level by which the applications will be provided to ED.

The utilities expressed that the detail process for ED's application review needs to be worked out. ED reiterated that its process should be in parallel with the utility's internal review process and that it should not delay the utilities review process or be invasive to the customers. The key is to get the application from the IOUs to ED.

Action items:

- ED will revise the custom application review process straw document by this Friday, 3/5.

- Utilities will provide to ED a list of those who they wish to access the non-DEER workpaper review submission website in a spreadsheet or Word doc.
- ED will begin requesting utility specific non-DEER HIM measure/technology workpapers.

This Wednesday's (3/3/) meeting is TBD. Possible agenda discussion would be the next version of the non-res lighting workbook if Paul Reeve can get it ready for the utilities to review in time.