

# O&R Commercial Demand Response Online Portal Application Center User Guide

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Applied Energy Group, Inc.



## ***Orange & Rockland Commercial Demand Response Online Portal Application Center User Guide***

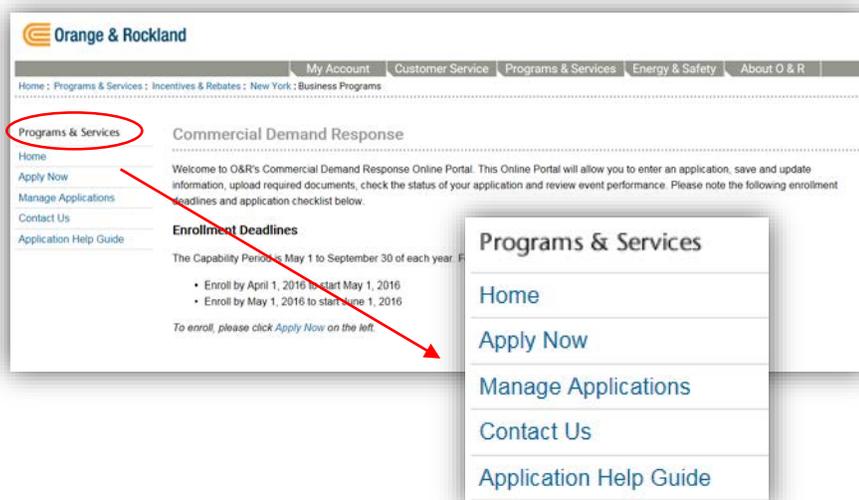
The purpose of this document is to provide participating customers with instructions on how to enter applications and utilize the **O&R Commercial Demand Response Online Portal Application Center**. Program portal instructions and *SAMPLE* screenshots of Application Center projects are included in this training documentation.

Customers can Log-into the O&R site at: <http://oru.programprocessing.com>

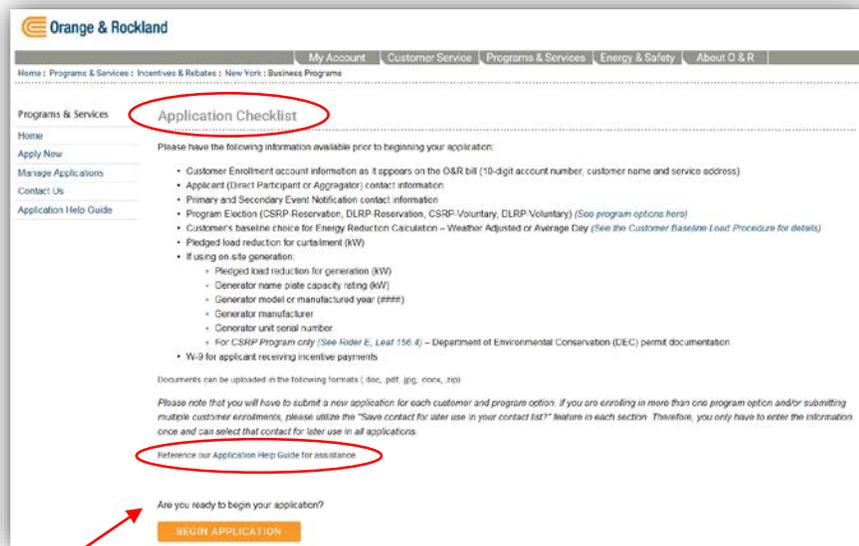
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# 1. Portal Application Center –Overview

- To access the **O&R Commercial Demand Response Online Portal**, enter the URL: <https://oru.programprocessing.com>.
- Customers will be navigated to the **Portal Home Page** for the Portal which includes Enrollment Deadlines and links to the following:
  - Apply Now** (where to enter new applications)
  - Manage Applications** (where existing applications are viewed and managed)
  - Contact Us** (where you can email O&R program administrators)
  - Application Help Guide** (User guide for Online Portal)



- The [Apply Now](#) link displays the **Application Checklist** page view and **BEGIN APPLICATION** button to begin the application entry process.



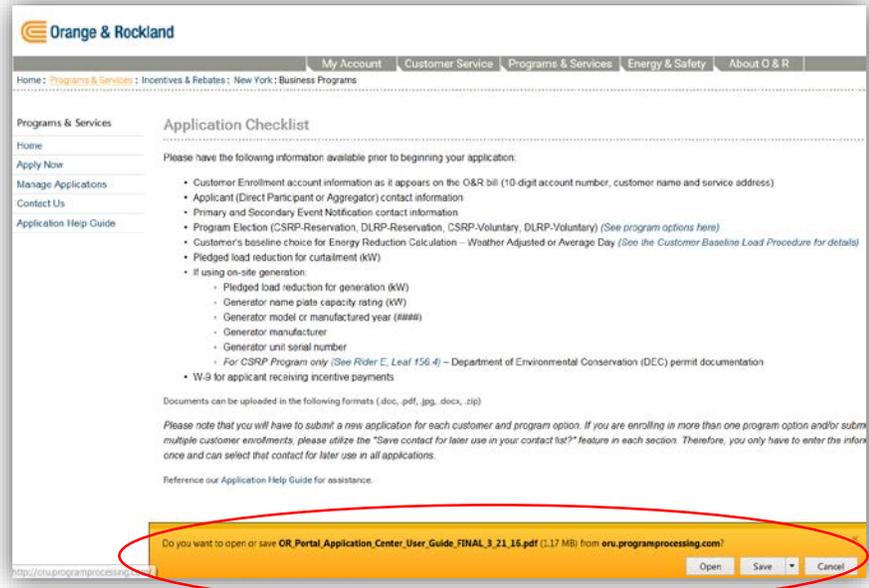
**NOTE:** Users can download instructions for using the Online Portal by selecting the [Application Help Guide link](#) located here.

4. The [Manage Applications](#) link displays the **Account Login page** for New and Returning Customers.

**NOTE:** *New Customers must first create an Account in order to access the O&R Online Portal (See Section 3 below).*

5. The [Contact Us](#) link displays the **Contact Us** email comment section as shown.

6. The [Application Help Guide](#) link allows users to [Open](#) or [Download/ Save](#) a PDF version of this **O&R Demand Response Program Portal Application User Guide**.



## 2. Application Entry Process

1. Select the **APPLY NOW** link from the drop down menu located on the left side of the home page to display the Application Checklist page view.

**NOTE: All new applications must be entered here.**

2. Select the **BEGIN APPLICATION** button to enter the **ACCOUNT LOGIN** page.

3. **RETURNING Customers** must enter their **Email Address** and **Password**, then select the **ACCOUNT LOGIN** button to access their account.

4. **NEW Customers** must create a 'new' account by selecting the **CREATE ACCOUNT** button as shown.

**NOTE:** Returning Customers with an existing account may select the **Manage Applications** link instead to go directly to the Log-in page & by-pass the Application Checklist page.

We recommend that you bookmark the Customer Log-in page for future use.

Orange & Rockland

Home | Programs & Services | Incentives & Rebates | New York | Business Programs

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Programs & Services

- Home
- Apply Now**
- Manage Applications
- Contact Us

### Application Checklist

Please have the following information available prior to beginning your application:

- Customer Enrollment account information as it appears on the OSR bill (10-digit account number, customer name and service address)
- Applicant (Direct Participant or Aggregator) contact information
- Primary and Secondary Event Notification contact information
- Program Election (CSRP-Reservation, DLRP-Reservation, CSRP-Voluntary, DLRP-Voluntary) (See program options here)
- Customer's baseline choice for Energy Reduction Calculation – Weather Adjusted or Average Day (See the Customer Baseline Load Procedure for details)
- Pledged load reduction for curtailment (kW)
  - If using on-site generation:
    - Pledged load reduction for generation (kW)
    - Generator name plate capacity rating (kW)
    - Generator model or manufactured year (####)
    - Generator manufacturer
    - Generator unit serial number
    - For CSRP Program only (See Rider E, Leaf 156-4) – Department of Environmental Conservation (DEC) permit documentation
- W-9 for applicant receiving incentive payments

Documents can be uploaded in the following formats (.doc, .pdf, .jpg, .docx, .zip)

Please note that you will have to submit a new application for each customer and program option; if you are enrolling in more than one program option and/or submit customer enrollments, please utilize the "Save contact for later use in your contact list" feature in each section. Therefore, you only have to enter the information select that contact for later use in all applications.

Are you ready to begin your application?

**BEGIN APPLICATION**

**Returning User? Please Log In:**

Email Address: \*

Password: \*

**ACCOUNT LOGIN**

*Forgot your password? Click [HERE](#) to retrieve it*

**New User? Please Create An Account:**

**CREATE ACCOUNT**

5. **For New Customers:** After selecting the **CREATE ACCOUNT** button, the **Account Details Profile** will display as shown:

- First Name
- Last Name
- **Email \***
- Utility Account Number
- Password
- Re-enter Password

**NOTE:** Required fields are marked with a red asterisk. \*

6. Select the **SUBMIT** button.

7. The **CUSTOMER APPLICATION** form is now displayed and includes the following sections:

**Customer Enrollment Contact:**  
Enter the Customer Account providing Load Relief.

**Applicant Contact (Direct Participant or Aggregator):**  
Enter the party responsible for enrollment in the program.

**Primary Event Notification Contact:**  
Enter the primary contact receiving notification of all events.

**Name this project:**  
Create a unique name that will help classify this project

**Customer Enrollment(s):**  
Enter details for the Customer Account providing Load Relief.

**Secondary Event Notification Information:**  
Enter the secondary contact receiving notification of all events.

**Certification & Signature:**  
Must be signed by Applicant Contact.

**8. Please complete all applicable and required sections with available customer & project information.**

You must submit a new application for each customer and program option. If you plan to submit multiple applications, make sure you check **“Yes, save this as a new contact in my profile contact list”** to save the contact for later use in applications.

When you start a new application, you can prefill the form with saved data by choosing the contact under **“Select Existing Contact.”**

**NOTE:** All fields marked with a **red asterisk \*** here and throughout the Application Form are **REQUIRED FIELDS** in the online portal.

**9. Create a unique name for each project to make it easier to search through your applications.**

Company: \* First & Last or Company  
 Zip: \*  
 Address: \*  
 Address (continued):  
 Phone: \*  
 eMail: \*  
 Save contact for later use in your contact list?  
 Yes, save this as a new contact in my profile contact list  
 CLEAR CONTACT

Primary Event Notification Contact:  
 Enter the primary contact receiving notification of all events. For future applications, please save this contact for later use.  
 -SELECT EXISTING CONTACT-  
 First Name: \* First & Last or Company  
 City: \*  
 Last Name: \* First & Last or Company  
 State: \*  
 Company: \* First & Last or Company  
 Zip: \*  
 Address: \*  
 Phone: \*  
 Address (continued):  
 eMail: \*  
 Save contact for later use in your contact list?  
 Yes, save this as a new contact in my profile contact list  
 CLEAR CONTACT

Name this project:  
 Create a unique name that will help classify this project  
 Customer Enrollment(s):  
 Enter details for the Customer Account providing Load Relief.  
 Program Election \*  
 Select  
 What is the Customer's baseline choice for Energy Reduction Calculation? \*  
 Select  
 Pledged Load Reduction Curtailment (kW) (If providing generation only, enter '0') \*  
 Select

10. If the customer is using **ON-SITE GENERATION**, the remaining fields in this section are required.

If the customer is *not* using on-site generation and providing curtailment only, then you can proceed directly to the **“Secondary Event Notification Information”** section.

**NOTE:** Applications must be electronically signed and the ‘I Agree’ checkbox entered before application submission.

11. Select the **CONTINUE** button to submit the application in the online portal.

Select

Pledged Load Reduction Curtailment (kW) (if providing generation only, enter '0') \*

Is Customer using On-Site Generation? (if 'Yes', fill required fields below. If 'No', proceed to next section.) \*

Select

Pledged Load Reduction Generation (kW)

Generator Type

Select

Generator Name Plate Capacity Rating (kW)

Generator Model/Manufactured Year (####)

Generator Manufacturer

Generator Unit Serial Number

Does the account have DSO Generation Compliance Documentation per Rider E? (Required for GDRP only. If participating in DURR select N/A.)

Select

**Secondary Event Notification Information:**  
Enter the secondary contact receiving notification of all events.

Secondary Contact Name: \*

Secondary Contact Phone: \*

Secondary Contact Email: \*

**Certification & Signature:**  
Must be signed by Applicant Contact.

This is a Contract for "Load Relief" in the OSR Demand Response Program selected above. By signing this application you certify that 1. you are authorized to represent the participating customer, and acknowledge that you are responsible for providing accurate customer data, and customer participation will comply with OSRT's demand response tariffs; 2. the customer is aware of their responsibility to ensure that any use of generators meets all federal, state, and local regulations, and their permitted conditions; 3. the customer(s) who are permitted to use generators in demand response are responsible for tracking the hours of use or amount of emissions to ensure participation in tests or events is in compliance with all limits on hours of use or amount of emissions.

Electronic Signature (Enter Applicant Contact First and Last Name) \*

I Agree \*

I Agree

**CONTINUE**

## 2. View and Manage Applications

Upon arrival in your **MANAGE APPLICATIONS** page view, you will be able to access information regarding all current and newly submitted applications in the following four sections:

- **Quick Actions**
- **Analytics**
- **New Tasks \***
- **Applications by Status**

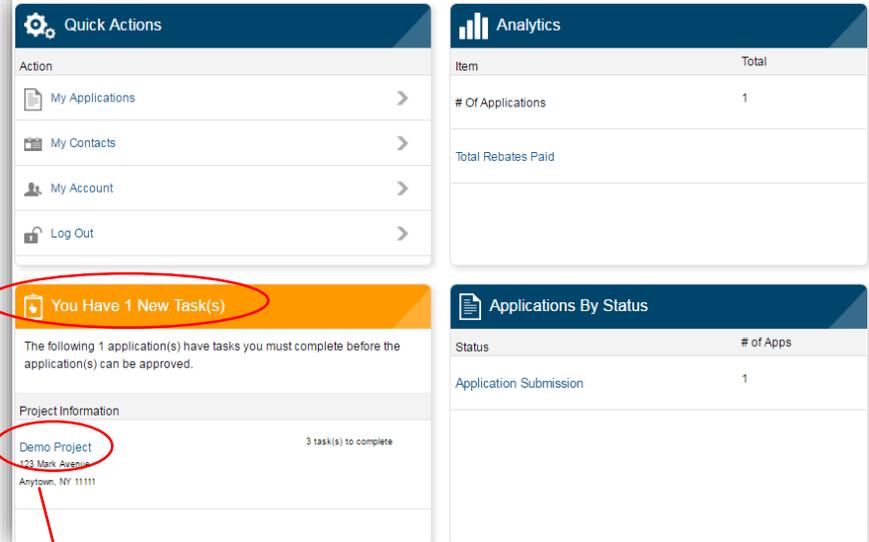
**Important Note:**

Click the link to the New Project

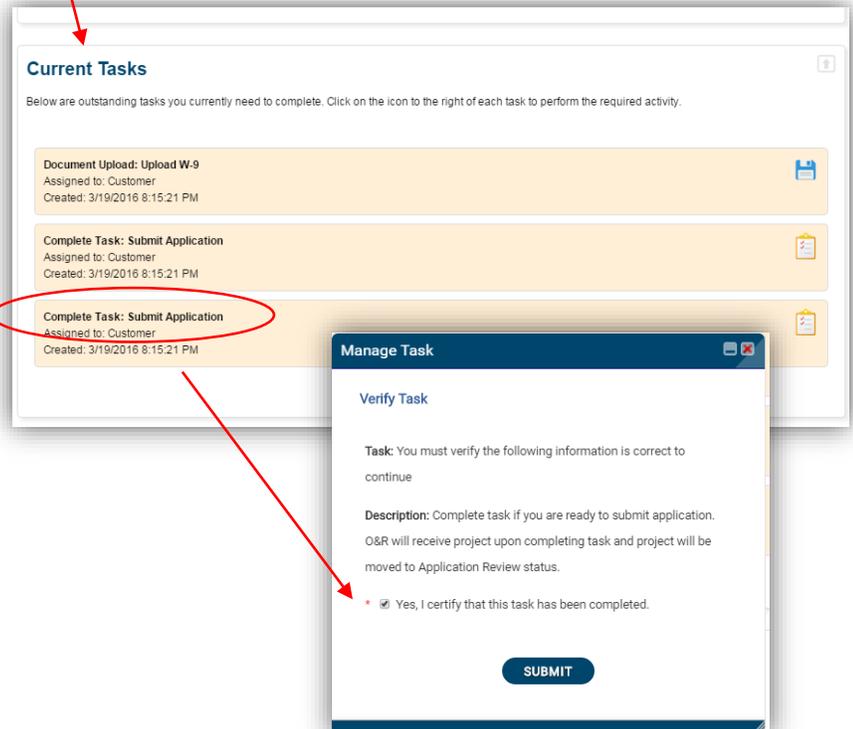
application in the  section to complete all tasks displayed in the **CURRENT TASKS** section as shown.

**Customers MUST complete the entire list of tasks for their type of project to submit the application for Program review.**

**NOTE: To begin a NEW application, you must return to Apply Now on the online Portal Home Page.**



The screenshot shows the 'MANAGE APPLICATIONS' dashboard. The 'Quick Actions' section includes links for 'My Applications', 'My Contacts', 'My Account', and 'Log Out'. A red circle highlights a notification that says 'You Have 1 New Task(s)'. Below this notification, it states 'The following 1 application(s) have tasks you must complete before the application(s) can be approved.' and lists 'Project Information' for a 'Demo Project' with '3 task(s) to complete'. The 'Analytics' section shows '# Of Applications' as 1 and 'Total Rebates Paid'. The 'Applications by Status' section shows 'Application Submission' as 1.

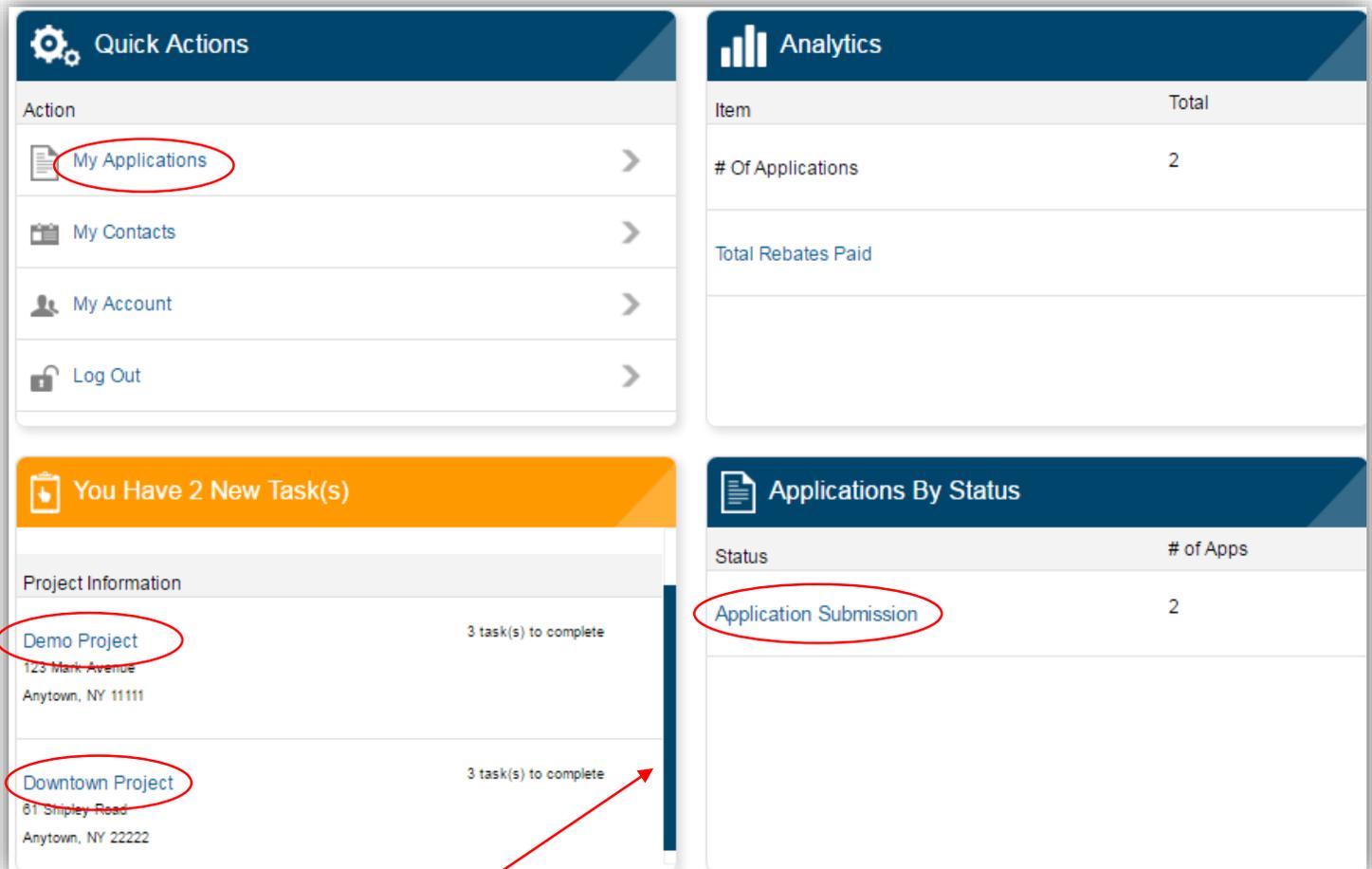


The screenshot shows the 'Current Tasks' section. It lists three tasks: 'Document Upload: Upload W-9', 'Complete Task: Submit Application', and another 'Complete Task: Submit Application'. A red circle highlights the second 'Complete Task: Submit Application' task. A red arrow points from this task to a 'Manage Task' dialog box. The dialog box has a 'Verify Task' section with instructions: 'Task: You must verify the following information is correct to continue' and 'Description: Complete task if you are ready to submit application. O&R will receive project upon completing task and project will be moved to Application Review status.' There is a checkbox labeled 'Yes, I certify that this task has been completed.' which is checked. A 'SUBMIT' button is at the bottom.

### 3. Application Center Features

#### 3.1 HOME Page

Your Application Center **HOME PAGE** includes an overview of all project applications you submitted in a single page view. Applications details are displayed by clicking the [links](#) in the various sections, like the ones circled in the illustration below. You can use the navigation arrows  to toggle back and forth between page views.



**Quick Actions**

Action	
 <a href="#">My Applications</a>	>
 <a href="#">My Contacts</a>	>
 <a href="#">My Account</a>	>
 <a href="#">Log Out</a>	>

**Analytics**

Item	Total
# Of Applications	2
Total Rebates Paid	

**You Have 2 New Task(s)**

Project Information	3 task(s) to complete
<a href="#">Demo Project</a> 123 Main Avenue Anytown, NY 11111	
<a href="#">Downtown Project</a> 61 Shipley Road Anytown, NY 22222	

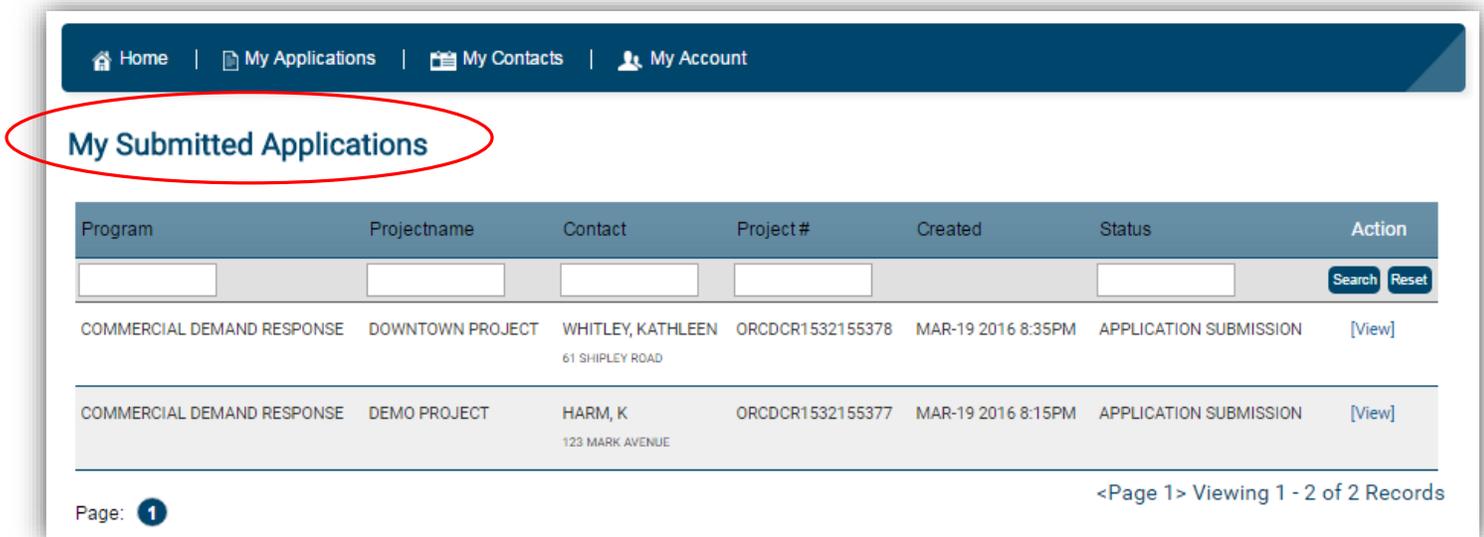
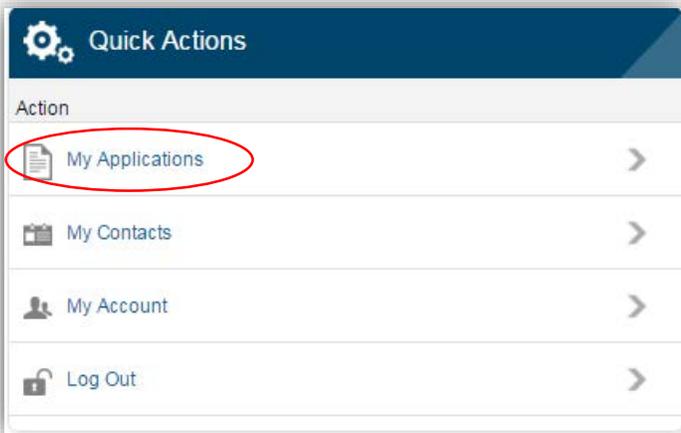
**Applications By Status**

Status	# of Apps
<a href="#">Application Submission</a>	2

You can utilize the **Blue Scroll Bar** located to the right of the **Tasks** and **Applications by Status** sections to scroll down and view all applications submitted.

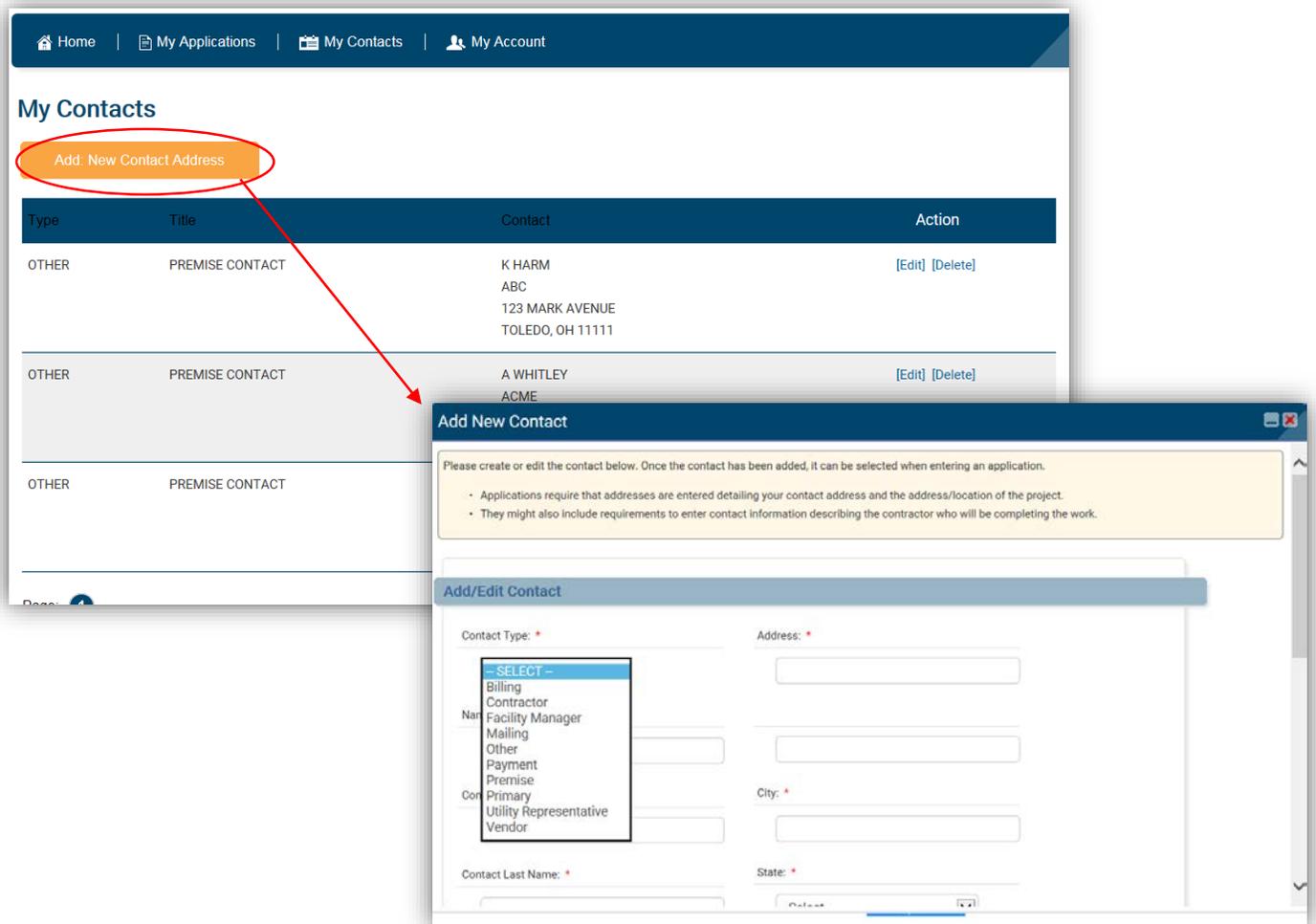
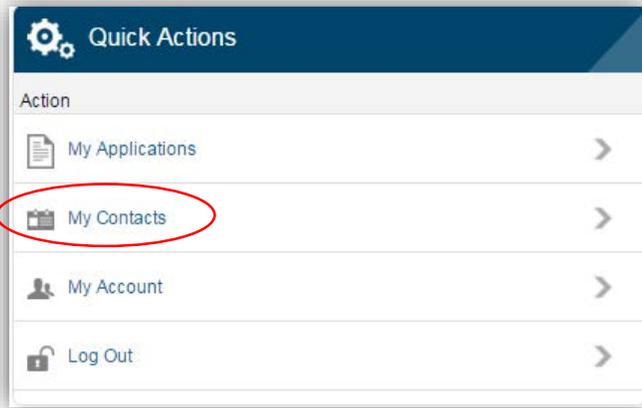
### 3.2 Quick Actions

The **QUICK ACTIONS** menu section provides you with immediate access to commonly used items including *My Applications*, *My Contacts*, *My Account* and *Log Out*. You can select the **My Applications** link to display and view all your submitted applications to the O&R Commercial Demand Response Program.



You may click on the **MENU LINKS** in the blue navigation bar shown to return to the Home Page  or toggle back and forth between other **Quick Actions** features.

The **My Contacts** section in Quick Actions displays a list of all current Premise, Primary and Contractor contacts for program applications entered through the Portal. Users may also **Add New Contacts** which can then be selected from a drop-down menu when entering a new application.



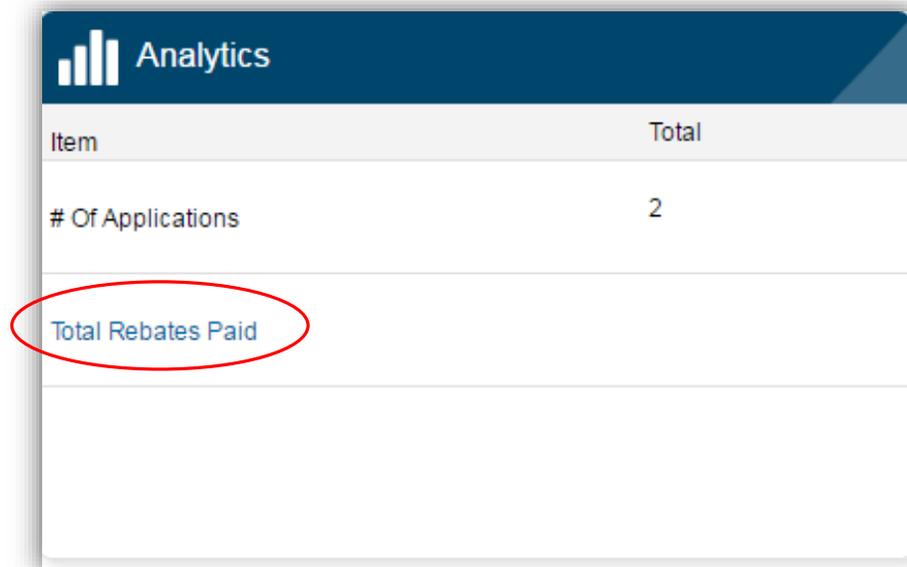
The **My Account** section in Quick Actions is where Users can **Manage Account Details**, including changing Passwords.



A screenshot of a 'Manage My Account' page. The page has a dark blue header with the text 'Manage My Account' and window control icons. Below the header, there is a form titled 'Account Details' (circled in red). The form contains several input fields: 'First Name' with the value 'Kathleen', 'Last Name' with the value 'Whitley-Harm', 'Utility Account Number' with the value '1111111', 'Password', and 'Re-Enter Password'. There is a red asterisk next to the First Name and Last Name fields. At the bottom of the form is a dark blue 'SUBMIT' button.

### 3.3 Analytics

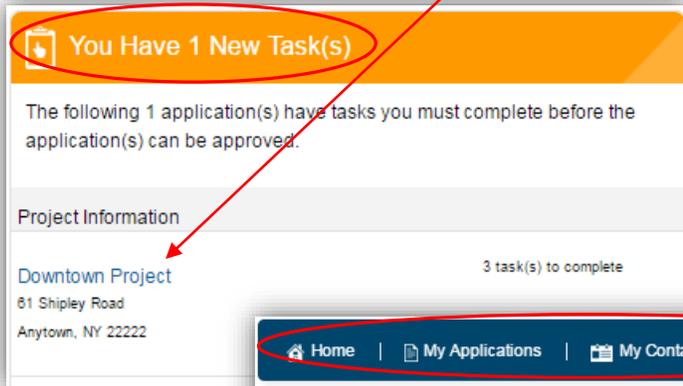
The **ANALYTICS** section of the portal provides quick statistics including total number of applications, paid incentives and electric reductions and event performance as applicable for all programs a customer has participated in.



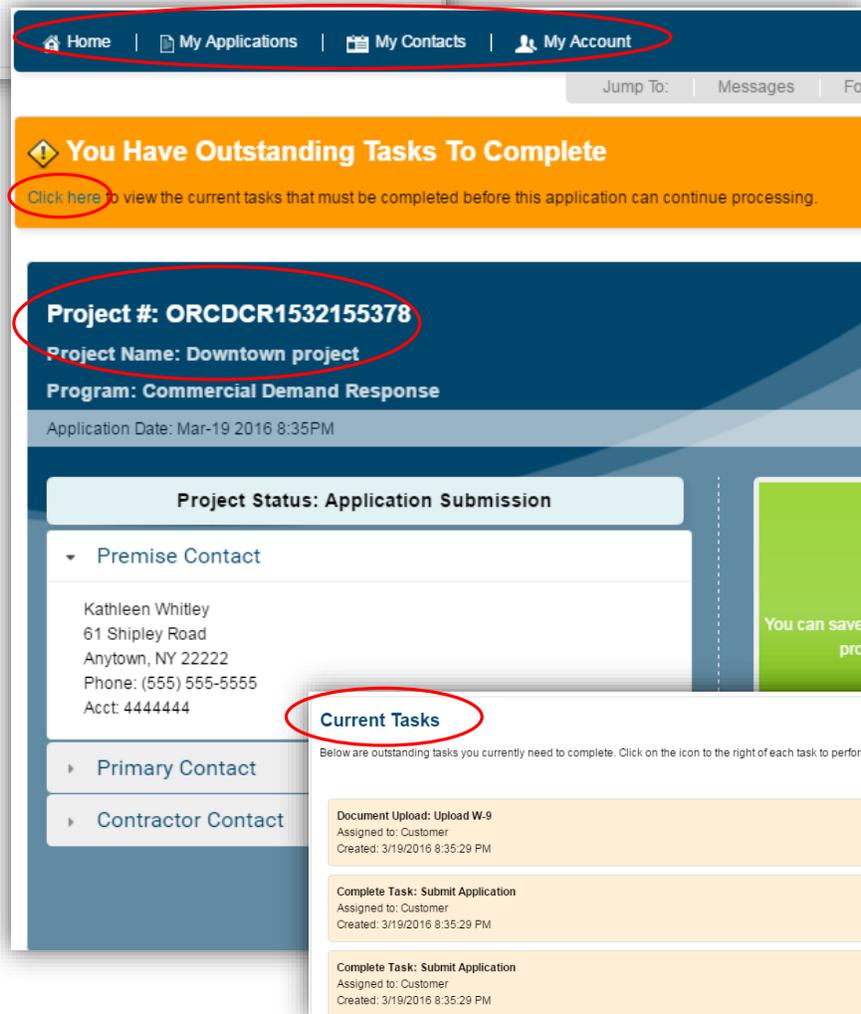
Analytics	
Item	Total
# Of Applications	2
Total Rebates Paid	

### 3.4 New Tasks

The **TASK** section indicates when there are project tasks which need to be completed for one or more of your applications. The box is highlighted in **ORANGE** indicates the number of tasks to be completed. Use the Blue Scroll Bar to select the desired **Project Name** link as shown to open the application in the Project Status view.



Selecting [Click here](#) to view current tasks will take you to the **'Current Tasks'** section near the bottom of the page view, as shown below.



### 3.5 Applications by Status

The **APPLICATIONS BY STATUS** list give you quick access to applications based on Status. Use the Blue Scroll Bar to select the desired **STATUS** link as shown to display all applications *in the selected status* which can then be individually viewed.

Status	# of Apps
<a href="#">Admin Hold</a>	1
<a href="#">Application Submission</a>	1

Home | My Applications | My Contacts | My Account

**All Applications in status: Admin Hold**

Program	Projectname	Contact	Project #	Created	Status	Action
COMMERCIAL DEMAND RESPONSE	DEMO PROJECT	HARM, K 123 MARK AVENUE	ORCDCR1532155377	MAR-19 2016 8:15PM	ADMIN HOLD	[View]

Page: 1 <Page 1> Viewing 1 - 1 of 1 Records

Home | My Applications | My Contacts | My Account

**All Applications in status: Application Submission**

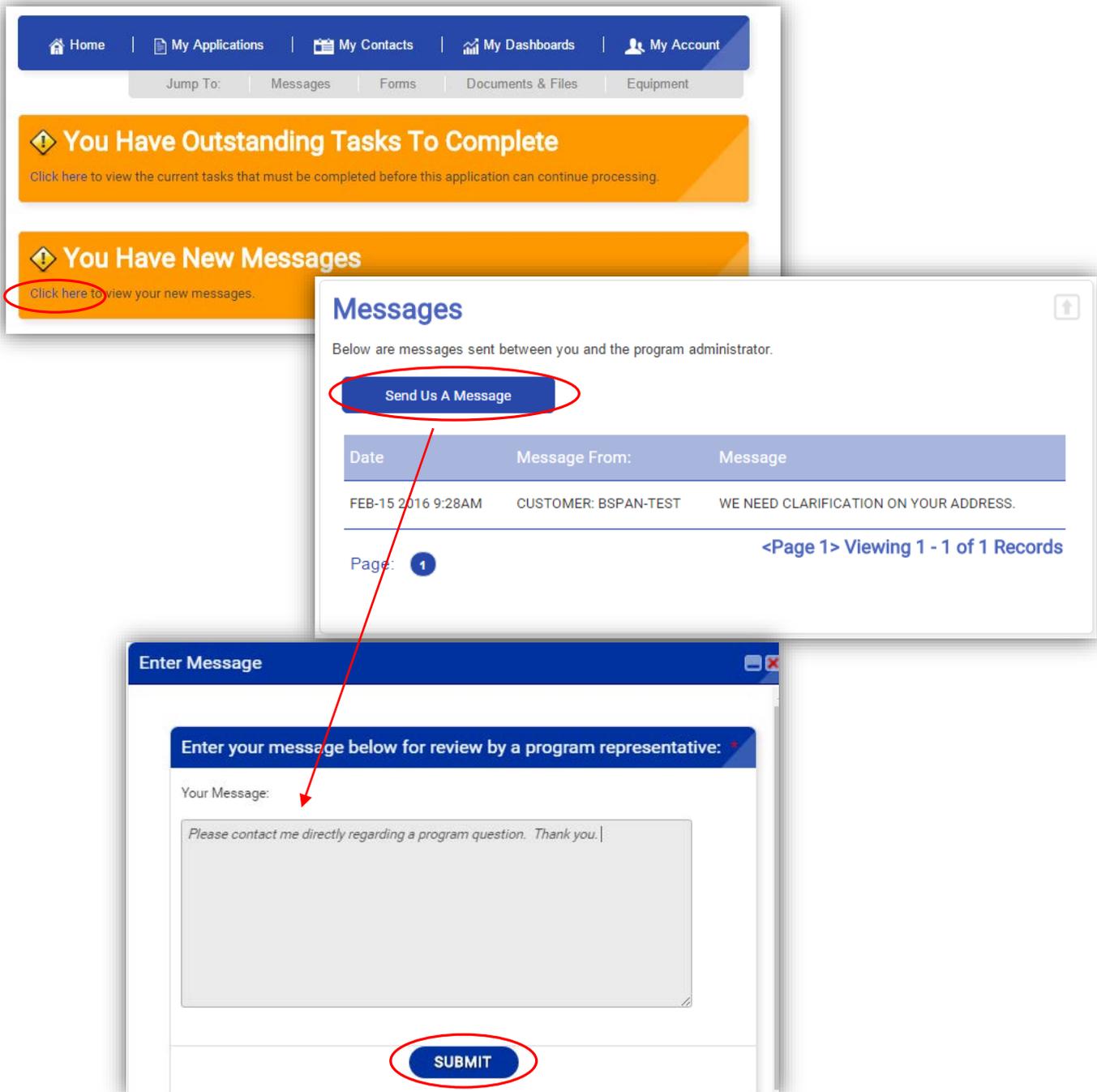
Program	Projectname	Contact	Project #	Created	Status	Action
COMMERCIAL DEMAND RESPONSE	DOWNTOWN PROJECT	WHITLEY, KATHLEEN 61 SHIPLEY ROAD	ORCDCR1532155378	MAR-19 2016 8:35PM	APPLICATION SUBMISSION	[View]

Page: 1 <Page 1> Viewing 1 - 1 of 1 Records

### 3.6 New Messages

The **MESSAGE** center box highlighted in **ORANGE** displays all messages related to the application.

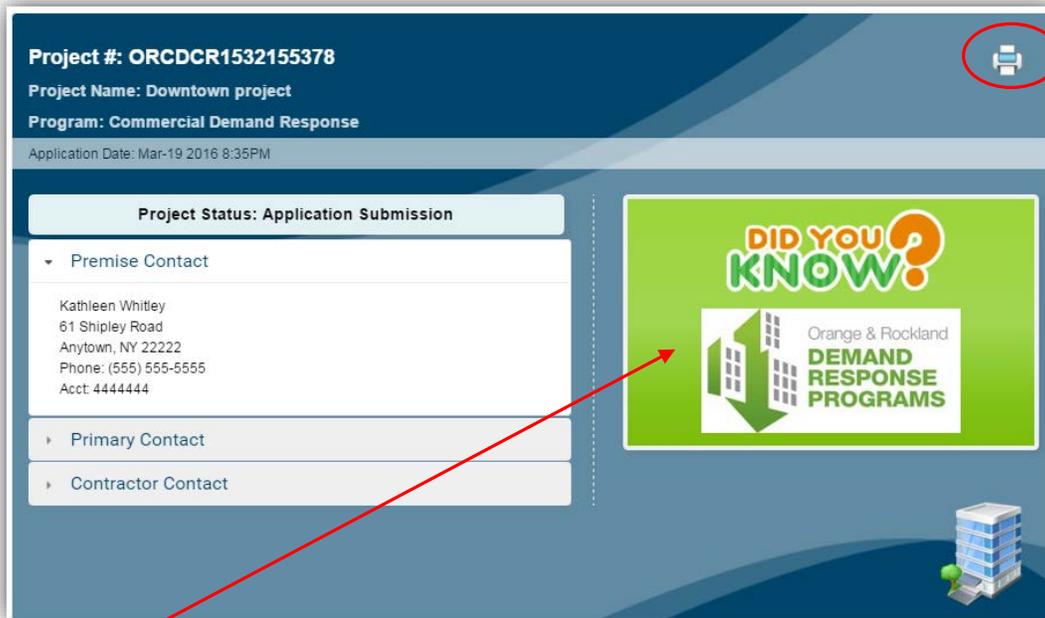
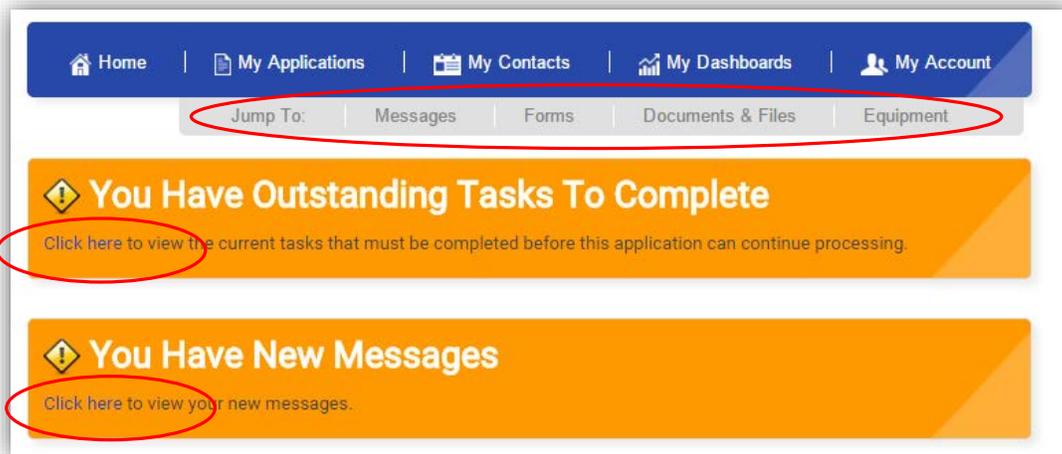
Selecting [Click here](#) to view new messages will take you to the **'Messages'** section of the page view, as shown below. You may also select the [Send Us A Message](#) button to respond, if desired. Your sent message will also be displayed in the **'Messages'** section.



### 3.7 Application Detail View

The **APPLICATION VIEW** displays the entire project on a single page.

The grey **Jump To:** menu bar provides quick access to various sections of the application including **Forms, Documents, Files and Equipment**. The highlighted **orange sections** alert you to new **Tasks** and **Messages** posted and provide quick links to each. Customers can select the  icon to print applications and supporting documentation.



*(The bright green information displays one or more utility messages, efficiency tips or banner advertising for other programs.)*

### Messages

Below are messages sent between you and the program administrator.

[Send Us A Message](#)

Date	Message From:	Message
FEB-15 2016 9:28AM	CUSTOMER: BSPAN-TEST	WE NEED CLARIFICATION ON YOUR ADDRESS.

Page: 1 <Page 1> Viewing 1 - 1 of 1 Records



You can click the **Back to the Top** button to return to the top of the Project Application page view.

### Current Tasks

Below are outstanding tasks you currently need to complete. Click on the icon to the right of each task to perform the required activity.

- Document Upload: UPLOAD COMPLETED & SIGNED REGISTRATION FORM**  
Assigned to: Customer  
Created: 2/15/2016 3:59:16 PM
- Document Upload: UPLOAD SIGNED TECHNICAL WORKSHEET**  
Assigned to: Customer  
Created: 2/15/2016 3:59:16 PM
- Document Upload: UPLOAD SITE MAP**  
Assigned to: Customer  
Created: 2/15/2016 3:59:16 PM
- Document Upload: Upload Signed and Dated Contract**  
Assigned to: Customer  
Created: 2/15/2016 3:59:16 PM
- Document Upload: Upload Utility Bill (Behind the Meter Projects)**

### Forms

Below is a list of all of the forms you've filled out for this project. Click on a form below to view its details.

- APPLICATION FORM 1
- APPLICATION FORM 2
- UPLOAD INSTRUCTIONS

### Documents & Files

Below is a list of all of the documents and files that have been created for this project, including letters and emails. Click on an item below to view its details.

Documents

Files

- Technical Worksheet.Pdf  
Uploaded: 2/15/2016 9:10:24 AM
- Registration Form.Pdf  
Uploaded: 2/15/2016 9:10:13 AM
- Contract Example Uploa...  
Uploaded: 2/15/2016 9:10:43 AM
- Site Map Example Uploa...  
Uploaded: 2/15/2016 9:10:33 AM
- Utility Bill Example D...  
Uploaded: 2/15/2016 9:10:56 AM

### Equipment

Below is a list of all equipment you've added to this project. Click on the icon to the right of each equipment item to view details.

## 4. Contact Information

For questions regarding VisionDSM and the O&R Commercial Demand Response Portal Application Center, please contact Program Administrator Meridith Nierenberg at 845-577-3266 or by utilizing the **Portal Message Center** (see page 17).