

Small Commercial Program Overview

Process Summary

1. Create Project in P3 (create customer, premise and schedule assessment)
2. Enter Pre-Package Checklist documents and materials in P3 (see below)
3. Pre-Approval by a Program representative in P3
4. Work Installation
5. Enter Post-Package Checklist documents and materials in P3 (see below)
6. Final Approval by a Program representative in P3 (upon savings verification)
7. Payment (upon Final Approval)

Pre-Package Checklist

Items listed below are **required to be submitted in P3 and project must be pre-approved by program coordinator before work begins on any project. Only projects that are pre-approved are eligible for Cleco's Small Commercial Energy Efficiency Program incentive.**

- **Project Sponsor and Customer Agreement**
 - Estimated Completion Date Required
 - All signatures must be valid
 - Cleco Utility/Account number(s) required
- **Recent Copy of customers Cleco Utility bill**
- **Drawings, Sketch or Map** of facility with locations of measures to be installed
- **ENERGY STAR, DLC, & AHRI Certifications** (for each equipment model number listed in LSF/ACE)
 - For Lighting Projects: ENERGY STAR or DesignLights Consortium (DLC)
 - For HVAC: AHRI
- **LSF or ACE Calculator** in Excel Format using most recent version needs to be used
 - All fields on the Project Info tab must to be filled out
 - For Lighting projects: the wattage on ENERGY STAR or DLC certifications needs to be used on LSF for savings/incentive calculations.
 - For HVAC Projects: Model number
- **Pre-Pictures**
 - Outside view of business name/building
 - For Lighting projects: pictures submitted must show existing fixture layout, wattages, model numbers of fixtures/lamps, and overall picture of room(s).
 - For HVAC projects: picture submitted must contain existing equipment model number & serial number.
- **Estimate or Quote**
 - Itemized cost
 - Fixture/lamp model numbers & quantity (must match or exceed counts on LSF/ACE)
 - Must show Cleco Incentive Amount Applied (Incentive Amount matches LSF/ACE)

Post-Package Checklist

Items listed below are **required to be submitted in P3 after project work is complete to be eligible for incentive payment through Cleco's Small Commercial Energy Efficiency Program.**

- **Final Invoice or Itemized Bill of Materials**
 - Equipment model numbers, cost for each, & quantity installed (should match LSF/ACE)
 - Cleco Incentive Amount Applied as a Credit (Incentive Amount should match LSF/ACE)
- **Certifications of Equipment** ENERGY STAR, DLC, or AHRI for each equipment model number installed.
- **Post Pictures** - Pictures submitted in post package should show in overall view of area where new equipment installed and photos of each new equipment installed which includes equipment model numbers.
- **New LSF or ACE Calculator** (Required only measures installed are different than stated before program approval)
- **All Bills Paid Affidavit** (Required only if a subcontractor was used by the Project Sponsor)
- **Customer Acknowledgment Form** (Must be filled out completely with all required signatures)