



# Commercial

## Standard Offer Program

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2026 Program Manual

Date: January 2, 2026

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# INTRODUCTION

Welcome to the 2026 Oncor Commercial Standard Offer Program (CSOP or the “program”). The CSOP offers incentives for installation of new equipment or retrofit projects at commercial customer locations in the Oncor service territory. Eligible customers may include business, government, educational, nonprofit and worship facilities.

The CSOP is designed to achieve energy and demand savings in the commercial market with a wide range of energy efficiency measures. Additional information on the CSOP project measures offered by Oncor can be found in the Texas Technical Reference Manual (TRM) Volume 3, which contains the deemed savings for nonresidential measures that have been approved for use in Texas by the Public Utility Commission of Texas (PUCT). Common commercial measures include new construction and retrofit lighting, HVAC, variable frequency drives, as well as other program measures that exceed existing energy code baselines in the TRM. Projects must be approved by Oncor prior to project start. Once completed, service providers receive incentive payments based on the verified project actual savings.

This program complies with the standard offer program requirements published by PUCT. This program manual is intended to inform service providers of the program requirements and processes. However, service providers should also review the PUCT rules related to energy efficiency programs and the requirements in the TRM for energy efficiency programs, and are required to comply with such rules and requirements.

This program manual summarizes program requirements, processes and incentives but may not address all scenarios. Oncor has full discretion to interpret or modify program requirements and may revise the program manual at any time.

Visit the Oncor Energy Efficiency Program Management (EEPM) website at <https://eepm.oncor.com> to access additional commercial program resources, including service provider and program applications, program manuals, program kick-off presentations, program measures, project documentation requirements and guidelines, commercial measure savings calculators, and insurance guidelines.

We are here to help! If you have any questions after reading these materials, please don't hesitate to contact our EEPM Support Team at 1.866.258.1874 or via email at [eepmsupport@oncor.com](mailto:eepmsupport@oncor.com).

## 1 PROGRAM OVERVIEW

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The primary objective of the CSOP is to achieve cost effective reductions in energy consumption. Additionally, the program is designed to:

- Encourage private sector delivery of energy efficiency products and services.
- Achieve customer energy and cost savings.
- Significantly reduce barriers to participation by streamlining program procedures.
- Encourage participation by a wide range of service providers.

The CSOP pays service providers for electric energy efficiency improvements above and beyond the efficiency gains typically achieved in energy efficiency projects. Incentives are offered at a fixed price per kilowatt and kilowatt hour saved, based on the estimated useful life (EUL) of the installed, verified and qualifying measure.

## 2 COMMERCIAL STANDARD OFFER PROGRAM

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Through the CSOP deemed savings pathway, Oncor offers incentives to qualifying service providers who complete projects with deemed demand (kW) and energy (kWh) savings. This standard offer incentive is the same for all service providers in the CSOP. The terms of the standard offer are outlined in the program addendum signed by each service provider.

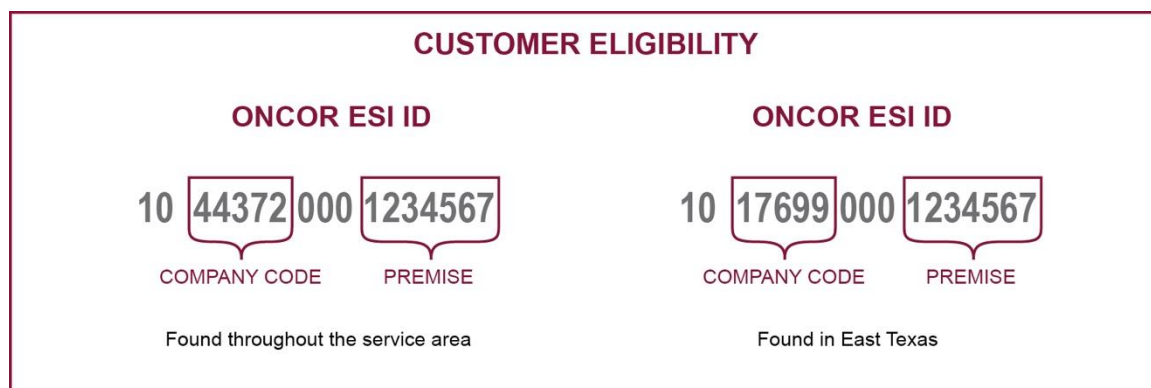
Through the M&V pathway, Oncor offers incentives to qualifying service providers who complete measures requiring measurement and verification.

Oncor will pay service providers a fixed price per kW and kWh saved, based on the Estimated Useful Life (EUL) of the installed, verified, and qualified measure.

### 2.1 Customer Eligibility

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To qualify for program incentives, a host customer must be a commercial customer who is served by Oncor and contributes to the Energy Efficiency Cost Recovery Fund (EECRF). Each Oncor commercial customer will have a 17-digit premise number (ESIID). An ESIID should appear on a customer's electric bill and always start with "10." For Oncor customers, the third through seventh digits will be either "44372" or "17699." When entering project information in EEPM, only the last seven digits of the ESIID are used as input.



### 2.2 Energy Efficiency Measures

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Below are some important guidelines for planning your CSOP project. A more extensive list of eligible measures can be found on our EEPM website in the Commercial Resources section.

#### Deemed Savings Measures

Measures may include lighting, cooling and heating energy efficiency improvements. CSOP incentives are calculated based on peak demand reduction (per kilowatt) and energy savings (per kilowatt hour) that exceed current state and federal minimum efficiency standards when they apply. Only energy efficiency measures with approved deemed savings (as noted in the latest version of the Texas TRM), and that are approved for use by Oncor, are eligible for CSOP incentives. All energy and peak demand savings must be measurable and verifiable using visual inspection and deemed savings calculations.

## M&V Measures

Projects using Measurement & Verification (M&V) for certain measures may be allowed, at the sole discretion of Oncor for large commercial customer projects with a minimum project incentive of \$10,000. Oncor engineering review of the project scope and M&V plan is required prior to Oncor's decision on project acceptance.

### 2.2.1 General Measure Requirements

Some general guidelines apply to all program measures. Additional requirements and specifications may also apply for specific measures. Oncor is the final authority on energy efficiency measure eligibility for incentives.

- Eligible energy efficiency measures do not include repair, maintenance, or behavioral changes.
- Proposed measures must not surpass the program measure's EUL.
- Measure must comply with all requirements of PUCT Substantive Rule 25.181.
- Measures must meet or exceed minimum equipment standards as provided in the TRM.
- M&V measures must produce a measurable and verifiable demand and energy savings.
- All M&V projects and measures must be reviewed and pre-approved by Oncor.

Additional measure-specific restrictions may apply to your project.

### 2.2.2 Non-Qualifying Measure Types

The following measure types are ineligible for program incentives:

- Measures that involve plug loads (loads that plug into a standard wall or floor outlet\*).
- Measures that involve track lighting or are installed in areas where they will not remain in place for the measure life.
- LED lighting that is not qualified by or is missing documentation from Design Lights Consortium (DLC), Energy Star®, or other organizations as noted in the current TRM at the time an initial application (IA) is submitted.
- Any modification to a fixture that may void the Underwriters Laboratories (UL) listing.
- Installed post fixtures that include Metal Halide, Type A Tube LED, and Type B Tube LED technologies.
- Measures that involve self-generation or cogeneration, except for certain renewable technologies.
- Measures that rely on changes in customer behavior and require no capital investment.
- Measures that achieve savings through equipment maintenance, commissioning, operational changes or controls without equipment efficiency upgrade.
- Measures that result in negative environmental or health effects.
- Measures that receive an incentive through any other energy efficiency program offered by Oncor.

\* As a general rule, energy efficiency measures involving plug loads (equipment or appliances that are plugged into standard electrical outlets) are not permitted. Oncor may waive this restriction if the service provider provides Oncor with reasonable assurance that the energy and/or demand savings associated with such energy efficiency measures are likely to persist over the EUL of the energy efficiency measure and quantifiable energy and/or demand reductions meeting the requirements of PUCT Substantive Rule 25.181 can indeed be achieved through the proposed energy efficiency measure(s).

### ***2.2.3 Examples of Eligible and Ineligible Energy Efficiency Measures***

Below are some examples of eligible and ineligible energy efficiency measures. However, a service provider may propose other energy efficiency measures for which a deemed savings value has been provided and approved by Oncor for inclusion in the program, provided the measure produces a measurable and verifiable electric demand reduction and/or reduce electrical usage through an increase in energy efficiency.

#### **Common eligible energy efficiency measures:**

- Lighting (including LED, T5 and T8 upgrades) and controls for new construction and retrofit projects. LED screw-ins are allowed in appropriate areas—verify with Oncor program manager for project specific eligibility.
- HVAC including Chiller, Direct Exchange (DX), Heat Pump, and Water-Cooled DX technologies for new construction, early retirement, and replace-on-burnout projects, and Variable Refrigerant Flow (VRF) and Geothermal technologies for new construction projects.
- HVAC for master-metered multi-family units and common areas.

#### **Sample ineligible energy efficiency measures:**

- Measures that do not raise efficiency above current standards
- Measures that do not meet or surpass the program measure's EUL
- Cogeneration and self-generation projects, except for renewable DSM technologies.
- Load shifting or load management measures.
- Load reductions caused by building vacancies
- Measures that rely solely on changes in customer behavior and require no capital investment
- Measures for which incentives were received from another Oncor program
- Repair and maintenance measures or measures that are not permanently installed
- Energy-efficient gas measures when replacing non-electric technologies
- Measures that result in negative environmental or health effects
- Power factor correction devices
- Non-labeled LEDs (e.g., missing LED model number)
- LED model numbers not certified by DLC or Energy Star®

#### **Multiple Measures and Multiple Sites Are Encouraged**

A project is defined by a set of proposed or installed measures and estimated demand and energy savings included in a single IA. A comprehensive project that includes a range of measure types is encouraged.

One project may involve the installation of measures at more than one customer site so long as the customers and sites are similar. For example, installation of measures at a chain of grocery stores may include more than one customer site, but may constitute a single project.

#### **New Construction Projects May Be Eligible**

New construction projects may be eligible for CSOP incentives if the service provider and incentive have influenced the host customer to install a design or equipment with a higher level of efficiency than what the host customer would have otherwise installed.

In addition, the host customer must confirm the incentive was vital to the increased efficiency. New construction facilities originally designed to meet high energy efficiency or net zero energy requirements may not be eligible to receive CSOP incentives if Oncor determines, in its sole discretion, the incentive was not vital to increasing the overall energy efficiency of the facility.

New construction projects include:

- New construction of a building, facility, addition, or outdoor parking and driveway area.



- Renovation that results in a change of building type (e.g., complete demolition of the interior walls, electrical, and mechanical equipment of an existing building).

Only areas that have undergone construction are eligible for new construction incentives. Final determination of the eligibility of a new construction project is at the sole discretion of Oncor. Buildings that are not customer occupied and typically have minimum lighting installed (e.g. shell warehouses for lease or sell) are not eligible for new construction incentives (check with Oncor after customer occupancy to determine project eligibility).

New construction incentive applications are also subject to special submission and documentation guidelines. See Section 4.1, "Submission Process," for details and deadlines when planning your new construction project.

## 2.3 Incentives

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### 2.3.1 Program Budget

The CSOP typically offers a multi-million-dollar incentive budget for each program year. Oncor reserves the right to adjust the budget as it deems necessary, in its sole discretion.

Project applications by Oncor approved service providers will be accepted until November 15, 2026, or until all program funding for the program year has been exhausted. Check the status of available funding any time by logging in at our EEPM website <https://eepm.oncor.com> with your registered service provider account.

### 2.3.2 Measure Incentives

Incentive payments will feature two components: a set \$/kW incentive for demand reduction and a \$/kWh incentive for energy savings, and will be based only on savings that exceed current minimum state and/or federal efficiency standards. Incentives are calculated using a formula that takes into account the measure's deemed annual savings, its EUL, a net present value calculation and, in applicable counties, a geographic multiplier. A list of measure incentive amounts can be found on our EEPM website in the Commercial Resources section.

#### Geographic Multiplier

In order to promote energy efficiency activities throughout the entire service area, there will be an additional 15% payment for all projects completed at sites outside the five-county metroplex area. The metroplex area includes Dallas, Tarrant, Rockwall, Denton and Collin counties.

#### Net Present Value Calculation

The incentive calculation will use a discount rate of 7.44% and an escalation rate of 2%.

### 2.3.3 Incentive Limits

#### 2.3.3.1 Per-Project Incentive Limits

The minimum CSOP deemed savings project incentive that can be requested is \$500. The minimum M&V project incentive is \$10,000, but may be lowered at Oncor's sole discretion. Incentives will also be limited to a percentage of the total cost of the project. In no case will Oncor pay incentives greater than 50% of the total project cost (as determined by Oncor, in its sole discretion, based on information provided by the service provider and any supplemental information gathered or requested by Oncor). Oncor reserves the right to cap the total incentive for each project site based on the Indoor Building Type (e.g., Agriculture High Intensity Sole-Source Greenhouse).

### 2.3.3.2 Service Provider Incentive Limits

To ensure incentives are available to multiple service providers, no service provider and/or its affiliates may receive more than 20% of the total CSOP incentive budget for all projects combined in a given budget year. In furtherance of this policy, service providers must register and regularly verify all affiliates in EEPM.

Oncor reserves the right to raise the service provider incentive cap at its discretion. Incentive funding is offered to eligible service providers with complete applications on a first-come, first-served basis.

## 3 PROJECT LIFE CYCLE

Service providers with an Oncor approved Umbrella Contract will submit program and project applications and receive communications from the program via their EEPM account. Service providers may submit project applications only after Oncor approves the service provider's program application for the current program year.

Service providers must apply to the current program year for the CSOP and obtain Oncor approval of your program application before submitting any projects in our EEPM system. To remain eligible for an incentive after a project is submitted, do not remove or disable any pre-equipment until Oncor completes a pre-inspection and provides permission to begin installation.

It is the sole responsibility of the applicant to ensure Oncor receives all required program and project application materials by close of business on the applicable due date.

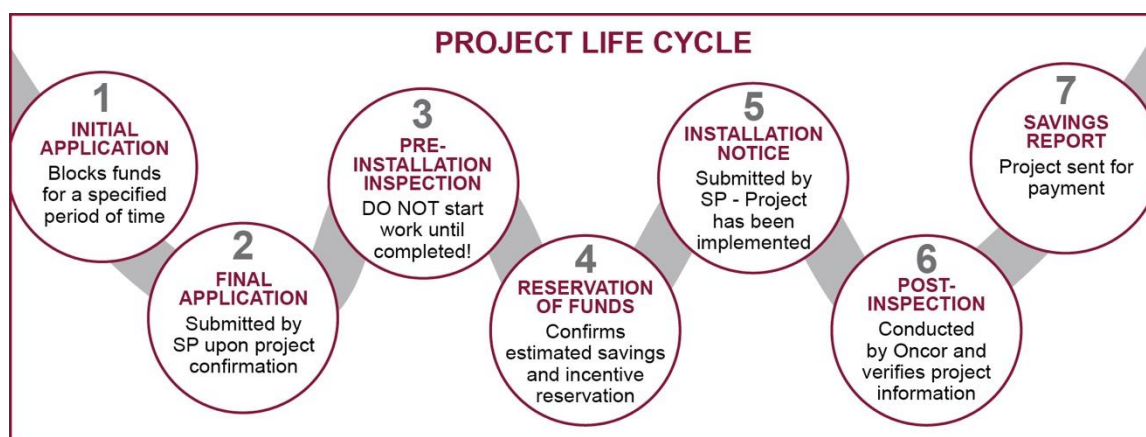
### 3.1 Submission Process

Each project application includes information about the service provider, the host customer site and documentation of the project to be implemented.

A project application will progress through the following four phases:

- Initial Application (IA)
- Final Application (FA)
- Installation Notice (IN)
- Savings Report (SR)

Below is an outline of the application process, from start to finish.



In addition, M&V projects will require a pre-data review after completion of the pre-inspection and/or a post-data review after completion of the post-inspection.



### **3.1.1 Initial Application**

#### **Applying Online • Measure details • Customer Agreement • Additional Lighting Documentation**

As a first step to applying for CSOP incentives, a service provider submits an IA for Oncor to perform a preliminary review of the proposed project's feasibility. IA required fields include the project's estimated completion date, estimated capital cost of installing the measure (e.g., labor, materials, taxes), service provider project and inspection contacts, and customer inspection and signatory contact.

Enter site(s) for each project using the last seven digits of the ESIID. The measure details will be updated in the measures section for each site. The measure details are used to calculate the demand and energy savings for the new or replacement efficiency measure(s) required based on the measure type.

After entering the measure details for each project site, click on the Next button to calculate incentive amounts and generate a Host Customer Agreement.

The service provider must provide a signed Host Customer Agreement with either a wet signature or by selecting the e-signature option in EEPM which will email the form to the appropriate signers for electronic signature (Customer and Service Provider will both sign).

After the Host Customer Agreement is signed, the submitted IA will be reviewed by the program manager. All projects require the measure details to be completed and a signed Customer Agreement before the project will be reviewed.

#### **Multiple-Site Projects**

Service providers must combine multiple, similar sites for the same host customer in a single project. If measures are planned for a series of franchise customers or chain stores during the program year, the service provider must contact the program manager before submitting their IA or their projects may be subject to cancellation.

#### **Additional Project Documentation Requirements**

The program requires additional documentation for certain measure types and on an as-needed basis. In addition to this section, documentation requirements can be found on our EEPM website in the Commercial Resources section.

#### **Additional Requirements for Lighting Projects**

Lighting projects require more detailed reporting in the measure file of the pre- and post-conditions. Service Providers are required to complete a physical survey / audit of the site before submitting a project for pre- and post-inspection to ensure that the lighting locations, fixture codes, quantities, and number of non-operating fixtures are correctly reported in the measure file. Projects that rely solely on drawings or customer reported data to generate the measure file will likely fail the inspections and will be rejected by Oncor for review and correction.

The reported data in the measure file should follow a logical audit path through the customer building/site starting at the entrance of the building or site. The pre-installation equipment survey / audit should generate the following information for all fixtures involved in the lighting retrofit and reported in the lighting measure file:

- The commercial building type, based on the predominant square footage of the project lighting area usage.
- A line-by-line identification of each room/area location to be retrofit is required. This will include a detailed description of the location/area of each fixture line in the measure file. In a room or area to be retrofit, the existing fixtures not planned for retrofit are also required to be reported in the measure file (e.g., existing LEDs) by listing the same pre- and post-fixture codes and quantities.
- The number of fixtures (including lamp and ballast types) per room/area for the pre- and post-conditions is required. The maximum quantity of fixtures allowed to be reported in the measure

file per fixture line is 50. Typically, if a service provider reports the maximum quantity of 50 fixtures on a fixture line, the project will be rejected by Oncor for correction. For large rooms/areas with 50 or more fixtures to report, additional fixtures lines in the measure file will be required using smaller fixture quantities per line. This should be done by reporting fixture quantities that align by straight rows in the ceiling, or by floor aisles/rows, with identifiable locations and starting/stopping points of the reported fixture quantity for each fixture line.

- The existence of lighting controls and control types is required for both the pre- and post-conditions for each fixture line.
- The type of room/area air conditioning is required for each fixture line.
- The number of non-operating fixtures is required for the pre-condition.
- The wattage of technology of each pre- and post-fixture. The pre- and post-fixture codes to be reported in the measure file are based on wattage, as listed in the standard wattage table in EEPM.

### **Existing Non-Operating Fixtures**

Retrofit lighting projects are allowed up to 10% of non-operating fixtures without impacting the incentive. If more than 10% of the total number of existing fixtures are inoperative for an inspected site, the baseline wattage of the project will be adjusted upward to reflect the percentage of non-operating fixtures beyond 10% and the incentive will be reduced (i.e., a 12% non-operating count will have the baseline wattage adjusted by 2%). For multi-tube or multi-lamp fixtures, only one tube/lamp is required to be operative when auditing the number of non-operating fixtures.

### **Illumination Engineering Society (IES) Recommended Light Levels**

Lighting projects must meet IES recommended light levels to qualify for an incentive unless Oncor approves a project-specific exception. If you propose a lighting retrofit that reduces the number of fixtures by 15% or more, you may be required to provide a lighting simulation that includes all lighting being installed. Oncor may request a lighting simulation for any project to demonstrate it meets IES recommended light levels.

### **New Construction Lighting Project Documentation**

New construction projects require signed, stamped, and dated Architecture/Engineer (A/E) drawings that include the following information:

- Clear and easily identifiable square footage of indoor and outdoor lighting areas.
- Outdoor lighted areas for driveways and parking areas should not include non-drivable areas such as concrete end caps, sidewalks, and building steps. The A/E drawing for outdoor lighting should use shading, cross-hatching or other visible means to only identify the lighted square footage of actual drivable areas. Also, additional incentives are available for certain outdoor lighting area types (e.g., truck dock loading areas, parking lot sales areas, sales canopies, fuel pump canopies), and these areas should be separately identified on the A/E drawing with their respective square footage.
- Lighting layout and schedule.
- If A/E drawings are not available, the Oncor program manager may at its sole discretion accept a COMcheck document if it includes the applicable project data listed above. Please check with the program manager for document acceptance.

## **3.1.2 Final Application**

### **Submission in EEPM • Pre-Inspection Review • Reservation of Funds**

#### **Final Application Submission**

After the IA is approved, the service provider submits a FA and any documentation required for review of the project measure(s).

Provide the required documents for the measure(s) in the attachments/documents section of EEPM.

Required documents for more common measures include:

#### Lighting

- DLC and Energy Star certification sheets for LED fixtures, consolidated in a single, non-zipped, PDF file for all project sites, from lowest to highest wattage. LED Document Guidelines can be found on our EEPM website in the Commercial Resources section.
- LED manufacturer specification sheets showing LED model option codes and descriptions, consolidated in a single, non-zipped PDF file for all project sites, from lowest to highest wattage.
- Pre-fixture lighting photos, including one nameplate wattage photo of each unique pre-fixture, one profile photo of each unique pre-fixture, and several area photos preferably with all lighting turned on. Photos should be consolidated for each site in a single, non-zipped, PDF file.
- A/E drawings for new construction lighting projects, consolidated in a PDF file.
- Any other documents required by the program manager.

#### HVAC

- Air-Conditioning, Heating and Refrigeration Institute (AHRI) certificates for each unique HVAC unit model number are required, consolidated in a single, non-zipped, PDF file for all project sites. Units  $\leq 5.4$  tons must use the AHRI EER2 and SEER2 efficiency data. Units  $> 5.4$  tons may continue to use AHRI EER and SEER (or IEER) efficiency data.
- For units 20 tons and larger that do not have a AHRI certificate, a manufacturer simulation is required in a single, non-zipped, PDF file that shows unit performance at 100% load and the following AHRI conditions. The HVAC unit make and model number must be listed at the top of the simulation sheet.

##### Water Cooled Chillers

- Condenser Water Entering Temp 85 deg F and Flow Rate 3.0 gpm/ton
- Evaporator Leaving Temp 44 deg F and Flow Rate 2.4 gpm/ton

##### Air Cooled Chillers

- Entering Air (ambient air temp) Dry Bulb Temp 95 deg F
- Evaporator Leaving Temp 44 deg F and Flow Rate 2.4 gpm/ton

##### Air Cooled DX Units

- Entering Ambient Dry Bulb Temp 95 deg F
- Entering Cooling Dry Bulb (EDB) 80 deg F
- Entering Cooling Wet Bulb (EWB) 67 deg F

##### Water Cooled DX Units

- Condenser Water Entering Temp 85 deg F
  - Entering Cooling Dry Bulb (EDB) 80 deg F
  - Entering Cooling Wet Bulb (EWB) 67 deg F
- 
- For Variable Refrigerant Flow (VRF) units, the AHRI certificate must show the type of indoor air handling used (e.g., non-ducted, mixed, ducted) for each VRF module, and the reported performance efficiency should be consistent with the AHRI certificate and respective air-handling system installed. Engineering line drawings are required in a single, non-zipped, PDF file are required that clearly show the type(s) of indoor air handling installed. In lieu of providing an engineering line drawing, the service provider can accept a slightly lower incentive for the project by reporting all units as ducted and using the AHRI performance data for ducted units.

- For a unit reported as Early Retirement, a pre-equipment nameplate photo showing the make, model, and serial number and a pre-equipment profile photo is required. Existing unit operability will be required during the pre-inspection review.
- For VRF, Geothermal, and Water-Cooled DX units, a simple M&V Plan is required in Word format. Contact an Oncor program manager to obtain a sample M&V Plans in the required Word format for many of the available M&V measures.
- Any other documents required by the program manager.

Once the project is ready to move forward with a completed measure file and required documents uploaded in EEPM, the service provider will submit the FA to Oncor for pre-inspection review. **The service provider must submit the FA within 20 days of IA approval or the project may be cancelled by Oncor without notice.** Service providers who are not able to meet the 20-day deadline may contact an Oncor program manager to request an extension of the FA submittal deadline, which Oncor may grant, in its sole discretion, based upon review of the service provider's reported reason for the project delay.

### *3.1.3 Pre-Inspection Review*

#### **Pre-installation Inspections**

During the FA review process, Oncor may conduct a pre-installation inspection of the project site. The purpose of the inspection is to verify the baseline conditions documented in the application and feasibility of installing the proposed equipment. After the Service Provider submits a complete Final Application, the pre-inspection may be a desk review of pre-equipment photos taken and submitted by the service provider, or in most cases Oncor will contact the Service Provider inspection contact to schedule and complete an on-site inspection. Service Providers should allow ample time for completion of inspections, which may take up to two weeks depending on project volume.

Retrofit Projects – **To remain eligible for an incentive, the pre-equipment must not be removed or disabled until Oncor completes the pre-inspection and provides the service provider with permission to begin the installation.**

New Construction Projects - Will not require a pre-inspection.

#### **Pre-inspection Process**

Pre-inspections are intended to verify the following information:

- The equipment reported in the measure file is accurate. For most measures, equipment quantities and nameplate information are verified. For lighting measures and cooling equipment installations that do not have a one-to-one unit replacement, pre-inspection counts must be within  $\pm 5\%$  of the total demand submitted on the survey form. If the error exceeds  $\pm 5\%$ , the service provider may correct the measure details, subject to re-inspection by Oncor at the service provider's expense.
- All existing equipment listed in the FA is still in place and operational in the baseline condition.
- New equipment installation, or old equipment removal and/or demolition, has not begun. Any project where the replacement of measures has started prior to receiving pre-inspection and FA approval will be canceled and no incentive payment will be made.
- Additional information on the Inspection Process, including a Commercial Desk Inspection Checklist for Service Providers, can be found on our EEPM website under the Commercial Resources section.

### Failed Pre-inspections

If the project fails the first pre-inspection, Oncor may, in its sole discretion, either (i) cancel the project, releasing all or some portion of the reserved incentive funds, or (ii) allow the service provider to take corrective action, which will require re-inspection by Oncor. If Oncor allows the service provider to take corrective action, the service provider shall pay for each additional inspection. If the project fails any re-inspection, Oncor will have a similar right to disqualify the project or allow the service provider to take corrective action subject to additional inspections at the service provider's expense.

You will receive notification via EEPM of pre-inspection approval, rejection or any needed amendments to the FA.

### Corrections to Your Final Application

In the case of retrofit measures, if the existing equipment is removed or not operational during the pre-inspection, the incentive amount may be reduced or the project may be rejected or canceled. **If the FA is rejected for corrections, the service provider must resubmit the FA within 15 days or the project may be cancelled by Oncor without notice.** Service providers who are not able to meet the 15-day deadline may contact an Oncor program manager to request an extension of the FA re-submittal deadline, which Oncor may grant, in its sole discretion, based upon review of the service provider's reported reason for the project delay.

### Discrepancies Between the Initial Application and Final Application

If the FA incentive estimates differ from the incentive funds reserved in the IA, the FA savings and incentive estimates will take precedence over the IA, as the FA should include a more detailed and accurate estimate of demand and energy savings. Where FA estimates are lower than those approved in the IA, final incentives will be adjusted downward accordingly. In some cases, FA estimates may be higher than amounts approved in the IA. If all incentive funds have already been reserved, project incentives will be limited to the amount reserved in the IA.

### Reservation of Funds

Within 10 days of the Oncor program manager approval of the Final Application based on the results of the pre-inspection, the service provider must provide a signed Reservation of Funds Agreement (RFA) with either a wet signature or by selecting the e-signature option in EEPM which will email the form to the appropriate signers for electronic signature. After the RFA is fully executed by the service provider and Oncor, incentive funding is reserved for your project and the project will then move to the Installation Notice (IN) Open status in EEPM and the service provider may begin installation.

### **3.1.4 Pre-Measurement Data Review for M&V Projects**

For M&V projects, after pre-inspection approval, the service provider will conduct any required pre-measurement for the project. If required, the Oncor Inspection Manager will provide a sampling schedule to the service provider.

Upon completion of any required pre-measurements per the Oncor approved M&V Plan, the service provider will attach a summary of the data and supporting data worksheets in EEPM. The Oncor program manager may provide sample worksheets in the required format for many measures upon request. Oncor will then complete a review of the reported pre-measurement data. If the project is approved based on the results of the pre-inspection and review of the pre-measurement data, the FA will be approved after the RFA is fully executed by the service provider and Oncor. The project will then move to the Installation Notice (IN) Open status in EEPM and the service provider may begin installation.

### **3.1.5 Installation Notice**

**Commencing Work • Updates to Measure Details • Installation Notice Customer Certification • Completed Project Documentation • Post-Inspection Review • Savings Report**

#### **Commencing Work**

After the FA is approved and the RFA fully executed, the service provider may commence work on the project. Upon completion of the work, the Service Provider submits the IN in EEPM to notify Oncor that the project is ready for post-inspection review. Documents required for the project measure must be correct and uploaded in EEPM prior to submittal of the IN.

Oncor reserves the right to request proof of materials purchased and/or proof that customer funding has been secured. Failure to provide the requested information may result in the cancellation of the project and release of the reserved funds.

#### **Updates to Measure Details**

##### **Unanticipated Changes During Installation**

If there were any changes to project equipment or metrics during installation, the service provider must update measure details for each project site and attach all supporting documents for any changes to the post equipment.

##### **Cooling Equipment Documentation Requirements**

After installing new cooling equipment, the service provider must conduct a post-installation equipment survey / audit and document the results in the “post-retrofit equipment” section of the project measure details. The required data includes installed equipment type, model number, serial number, capacity, and efficiency (based on AHRI certification).

Only the post-retrofit equipment should be updated by the service provider in the measure details. No changes should be made to the pre-retrofit equipment in the measure details that was approved by Oncor during the FA phase.

#### **Installation Notice Customer Certification**

After making any necessary updates to measure file details in EEPM and recalculating incentive amounts, the service provider must provide a signed Installation Notice Customer Certification with either a wet signature or by selecting the e-signature option in EEPM which will email the form to the appropriate signers for electronic signature.

#### **Completed Project Documentation**

The following required documents must be uploaded in the “Documents” section in EEPM before you submit your project to Oncor for post-inspection review (IN Submitted phase):



**For all Projects:**

- A signed Installation Notice Customer Certification. Make sure all lines are completed in both the Service Provider and Customer signature blocks, including the Date of Completion.
- Project invoice(s) should be itemized by the measure product installed, and include the cost of materials and labor related to the scope of the project being submitted for an incentive.

**For Lighting Projects:**

- DLC and Energy Star certification sheets for LED fixtures, consolidated in a single, non-zipped, PDF file for all project sites, from lowest to highest wattage. LED Document Guidelines can be found on our EEPM website in the Commercial Resources section.
- Manufacturer specification sheets showing LED model option codes and descriptions, consolidated in a single, non-zipped PDF file for all project sites, from lowest to highest wattage.
- Post-fixture LED lighting photos, including a nameplate photo showing the model number of each unique LED at each site (must be readable), a fixture photo of each unique LED at each site, and area photos. Photos should be consolidated for each site in a single, non-zipped, PDF file.
- Any other documents required by the Oncor program manager.

**For HVAC Projects:**

- AHRI certificates, consolidated in a single, non-zipped PDF file for all project sites.
- For Chiller units, a manufacturer simulation that shows unit performance at 100% load and at AHRI conditions.
- Post-equipment photos of each unit nameplate showing the model and serial number (must be readable), and of the entire unit. Consolidate all photos in a single, non-zipped PDF file and label all unit photos to correspond with the Unit ID and sequence in the EEPM measure file.

**New Construction Project Documentation Deadlines**

New construction project applications must be submitted in EEPM no later than four months after a permanent electric service meter is installed, or no later than four months after the date in a Certificate of Occupancy issued by a municipal or other government entity. If construction on any such project is not complete within the above four-month period, the project may still be eligible for the program, provided:

- The project is submitted to EEPM no later than four months after the permanent electric service meter is installed, or no later than four months after the date in a Certificate of Occupancy; and
- The project sponsor notifies the appropriate Oncor program manager of the delay in construction completion and the Oncor program manager approves an extended construction completion date. That extension is typically up to 60 calendar days, and is at the sole discretion of Oncor.

**Installation Notice**

After all required documents are attached in EEPM, submit the IN to notify Oncor your project is ready for post-inspection review.

**3.1.6 Post-Inspection Review**

The post-inspection will follow a process similar to the pre-inspection. Once a project is post-inspected, you will be notified of the inspection results by EEPM. If approved based on the results of the post-inspection, the project will move to the Savings Report (SR) open status.

### 3.1.7 Post-Measurement Data Review for M&V Projects

For M&V projects, after post-inspection approval, the service provider will conduct any required post-measurement for the project. If required, the Oncor Inspection Manager will provide a sampling schedule to the service provider.

Upon completion of any required post-measurements per the Oncor approved M&V Plan, the service provider will attach a summary of the data and supporting data worksheets in EEPM. The Oncor program manager may provide sample worksheets in the required format for many measures upon request. If the project is approved based on the results of the post-inspection and review of the post-measurement data, the IN will be approved. The project will then move to the Savings Report (SR) Open status.

### 3.1.8 Savings Report

#### **Savings Report Content • Incentive Approval and Processing**

After passing post-inspection review (and post-data review for M&V projects), the service provider must provide a signed Savings Report (SR) with either a wet signature or by selecting the e-signature option in EEPM which will email the form to the appropriate signer for electronic signature. The program manager will notify the service provider when the Savings Report is available in EEPM for signature.

The SR is the primary reporting instrument used throughout the program production period, reflecting the final kWh and kW savings, the final incentive amount, and serving as an invoice to the program for project incentives.

The SR requires a service provider's review and acceptance. A service provider must sign the SR in EEPM no later than 10 days after the project has been post-inspected. The project may be canceled and all incentives forfeited if the SR is not signed within this time frame. Maintain a copy of the SR in your records for a period of four years.

After submission of the SR, the program will request any additional information needed or approve the SR and process the incentive performance payment.

## 4 INCENTIVE APPROVAL

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During any phase of the project (IA, FA, IN, SR), if any documentation submitted in EEPM to Oncor does not support the proposed measure(s) and the accuracy of the savings estimates, then Oncor at its sole discretion may cancel the project.

### 4.1 Project Evaluation Criteria

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Oncor may reject a project application for any reason in its sole discretion, including:

- The project application is received after the budget for the program has been fully committed.
- Required submittals are not received by deadlines stated in this program manual.
- The applicant fails to meet program eligibility requirements as determined by Oncor in its sole discretion.
- The applicant is found to have made material misrepresentations in the project application.
- The applicant fails to comply with applicable federal, state and local laws and regulations.
- Changes in laws or regulations occur that directly affect the program.
- Oncor, in its sole discretion, determines the applicant is incapable of fulfilling the terms and conditions of the program.
- Measures were installed prior to pre-inspection.
- Measures installed do not meet eligibility criteria.

- The applicant did not provide correct and complete information such as:
  - Service provider project manager contact.
  - Service provider inspection contact.
  - Customer inspection contact. (Note the customer inspection contact should not be the same as the service provider inspection contact.
  - Customer signatory contact.

Oncor may request clarification of, or additional information about, any item submitted as part of the project application. Applicants must respond to such requests within the time period specified by Oncor. If the clarification or additional information provided is not sufficiently responsive, Oncor may, at its sole discretion, request additional information or discontinue its evaluation of the submittal. Any applicant submitting an unsuccessful project application may reapply for project funding by submitting another project application. However, the applicant will lose its initial position in the wait-list order of submittal for budget reservation purposes, if applicable.

## 4.2 Inspections

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Oncor performs pre-installation and post-installation site and desk review inspections for the CSOP projects. Service providers should allow ample time for completion of inspections, which may take up to two weeks, depending on project volume. Although Oncor performs inspections to verify baseline conditions or completed projects, Oncor provides no warranty or endorsement with respect to any project, including, without limitation, the work completed, the equipment or measures installed, or any energy savings relating to a project. For larger lighting projects with a large number of rooms and fixture types, the service provide can submit the project in both the FA and IN phase and request that program manager and inspection manager identify which areas and lines in the Measure file will need photos for the desk review. If an on-site inspection is required, the inspector manager will communicate to the service provider inspection contact which fixtures will require access to obtain photos during the on-site inspection.

### **Personnel Required On-Site**

The service provider and/or personnel who completed the required measure details will be required to be on-site during pre- and post-installation inspections for projects requiring an on-site inspection. The presence of at least one service provider representative who is familiar with the project and the facility will ensure all parties can identify any discrepancies simultaneously. The service provider will provide all equipment required by the inspector to inspect the project site, including ladders, lifts, and tools, at the service provider's expense.

### **Required Electrical or HVAC Disruptions**

When electrical measurements are necessary, the service provider representative(s) will be required to perform any necessary disruptions in equipment operation, the opening of any electrical connection boxes, or the connection of current and power transducers.

When it is necessary to determine the operability of an existing HVAC/chiller system in cooling mode, the representative(s) will be required to perform any necessary disruptions or configuration changes in system operation to demonstrate such operability. If the inspection cannot be completed in a timely manner because the service provider is unfamiliar with the facility or project, the project site will fail the inspection.

### **Post-Installation Inspections**

During the post-inspection review process, Oncor will perform either a complete project inspection or an inspection of a random sample of measures using a statistically representative number of project sites. For some projects, Oncor may accept photo documentation and conduct a desk review of post equipment photos submitted by the service provider.

Oncor will contact the service provider and conduct a post-installation inspection of the project site after the receipt of a complete IN submittal in EEPM. The inspection shall verify the equipment specified in the measure file has been installed and is operating as described in the submitted IN. For most measures, the accuracy of the equipment quantity and nameplate information is verified. For lighting measures, the measures observed during the inspection must be within  $\pm 5\%$  of the total demand submitted on the survey form.

Oncor reserves the right to reject any installed energy efficiency measure for any of the following reasons in its discretion:

- Poor workmanship.
- Service provider or host customer modification to the installed measure.
- Lack of UL listing.
- Measure not operating correctly.
- Measure or its installation poses a safety hazard.
- Measure or its installation poses an environmental hazard.
- Non-permissible access for verification for installed measures.
- Measure does not comply with local or state building codes or standards listed in the TRM.
- Measure does not comply with National Electric Code or National Electric Safety Code.
- Failure to comply with Oncor CSOP requirements or any applicable laws or regulations.

### **Failed Post-Inspections**

If a project site fails an inspection, Oncor may, in its sole discretion, either (i) cancel the project, releasing all or some portion of the reserved incentive funds; or (ii) allow the service provider to take corrective action, which will require re-inspection by Oncor prior to the approval of the IN. If Oncor allows the service provider to take corrective action, the service provider shall pay for each additional inspection.

Oncor reserves the right to reject any installed measure for any reason in its sole discretion.

## **5 INCENTIVE PAYMENT**

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Incentives will be paid after the project is complete, Oncor has determined all requirements for the project and participation in the program have been met, and the SR is approved. The SR will serve as the service provider's invoice for incentive payments, and incentives will be paid only to the project service provider in one installment. Payments will be made by check and mailed to the service provider address provided in their W9 form on record with Oncor, unless a different mailing address is requested by the service provider in writing or e-mail to the Oncor program manager.

Actual incentive payment is contingent upon the project's verified savings and will not exceed the amount in the Reservation of Funds Agreement. Changes in the scope of a project will not be eligible for incentives after execution of the Reservation of Funds Agreement; however, Oncor may, in its sole discretion, reduce or eliminate any incentive payments specified in a Reservation of Funds Agreement based on its determination that any requirements for the project or participation in the program have not been met.

### **5.1 Adjustments to Incentives Following Post-Inspections**

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Oncor may adjust incentive payments based on findings from on-site inspections and review of project data.

After inspections are completed, all installations will be evaluated on a measure-by-measure basis to calculate an adjustment factor for energy savings and incentive payments.

In the event the service provider disagrees with the payment adjustment, the service provider may request all information be reviewed again after additional clarifying information is provided by the service provider. However, final payment adjustments will be at the sole discretion of Oncor.

## 6 IMPORTANT PROGRAM DATES AND DEADLINES

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### Project Application Submissions

The EEPM portal will begin accepting 2026 program applications from Oncor service providers in December 2025 and project applications in January 2026. An approved program application is required before you can begin any project applications in EEPM.

### Completed Installations

Projects must be completed by November 15, 2026, to receive incentives in the current year. All projects should close on or before their completion date as indicated in EEPM.

### Savings Reports

Final SRs must be submitted to Oncor no later than November 15, 2026, at 5 p.m. Central Time. An extension for your SR may be granted if requested by September 15, 2026.

### Project Installation Deadline Extension Requests

The service provider must notify the Program Manager by September 15, 2026, if the project will not be completed by November 15, 2026, as that will require the project to be rolled over to the 2026 program year. If notification is not received by September 15, 2026, and the project is not completed by November 15, 2026, then Oncor may, in its sole discretion, cancel the project and declare it ineligible for any or all incentives.

### 2026 Rollover Projects

A 2026 project rolled over to the 2027 program year must be completed by May 31, 2027. If the project is not completed by May 31, 2027, then Oncor may, in its sole discretion, cancel the project and declare it ineligible for any or all incentives.

## 7 WAITLISTED PROJECTS

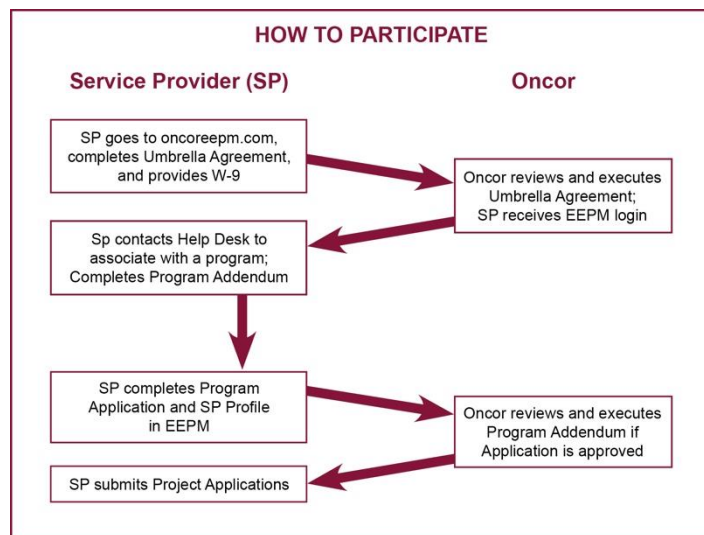
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Projects will be waitlisted when all program budget funding is reserved. As additional funding becomes available, the funds will be offered to projects on the waitlist in the order they are submitted, and those projects will move to the IA Submitted status in EEPM.

**Retrofit Projects – To remain eligible for an incentive, the pre-equipment must not be removed or disabled until Oncor completes the pre-inspection and provides the service provider with permission to begin the installation.**

## 8 HOW TO PARTICIPATE

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### 8.1 Service Provider Eligibility and Requirements

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Each service provider must register in EEPM, provide documentation of required insurance, enter into the Umbrella Contract, apply to and be accepted to participate in the CSOP and execute the program addendum with Oncor to participate in the program. By executing the program addendum, Service Provider warrants and represents that it is aware of and will comply with all of the Oncor Contract Documents. Service Provider also warrants and represents that it meets or exceeds all of the following qualifications:

- Evidence of possession of all applicable licenses required under state law and local building codes
- Can produce the required proof of insurance and evidence of possession of all building permits required by governing jurisdictions
- Can produce evidence that any subcontractors used carry the insurance requirements as required by Service Provider
- Service Provider warrants and represents that their project(s) meets all applicable federal, state, and local laws and regulatory requirements

#### 8.1.1 Service Provider Application Criteria

Oncor requires applicants to demonstrate their financial, technical and managerial qualifications to help ensure projects will be successful in delivering the estimated demand and energy savings, and the applicant is committed to fulfilling program objectives and is competent to complete the proposed project.

Any service provider meeting the CSOP application requirements that propose to install or sponsor eligible commercial energy efficiency measures at the site of an Oncor commercial customer is eligible to participate in the CSOP as a service provider. Eligible service providers may include:

- National or local energy service companies.
- Retail electric providers.
- National or local companies that provide energy-related services (e.g., contracting) or products (e.g., lighting and HVAC equipment manufacturers and distributors).



### **8.1.2 Registering and Applying as a New Service Provider**

#### **Step 1: Register on the Service Provider Portal**

The EEPM service provider portal can be accessed at <https://eepm.oncor.com>. In the Log In window, click on the “**Not enrolled? Sign up now**” link.

Select the “Submit New UC” radio button

- Attach a current copy of your W-9 Form (pdf format)
- Provide your Company Name (should be same name as shown in W-9)
- Enter your Federal Tax ID or Social Security Number

On the next page (→) complete all required data fields

- Company Information
- Principal Owners List
- Corporate Contact List
- Vendor Documents
- Qualifications (complete all sections)
- Affiliates
- Sub-Contractors
- Employees (at least 2 employees are required)

You will then be able to view and e-sign the UC Agreement and submit your Service Provider Application to Oncor. After Oncor review and approval, you will receive an e-mail with temporary login credentials to access your new EEPM account.

#### **Step 2: Insurance Documentation Required**

General Liability, Auto Liability, and Workers Compensation Insurance is required to become an approved service provider. Insurance Guidelines can be found on our EEPM website in the Commercial Resources section. The Insurance Carrier should directly e-mail a COI to [eepminsurance@oncor.com](mailto:eepminsurance@oncor.com).

#### **Step 3: Complete Program Application and Sign Program Addendum**

Request association with the CSOP by contacting the EEPM Support Team at 866-258-1874 or [eepm-support@oncor.com](mailto:eepm-support@oncor.com). Then, complete the program application and sign the program addendum. The Service Provider must provide a signed program addendum with either a wet signature or by selecting the e-signature option in EEPM which will email the form to the appropriate signers for electronic signature.

Oncor will not entertain proposed modifications to the standard offer program addendum unless unique circumstances merit and require revision at the sole discretion of Oncor. Applicants are urged to review the sample program addendum prior to submitting a program application.

Oncor will typically notify applicants of their application status within 10 business days of submitting the application. If Oncor approves a program application, it will execute the program addendum. Once the Program Application is approved by Oncor, projects can be submitted to Oncor via the Service Provider's EEPM account.

Program addendums are ongoing (evergreen) but terminable for events of default by the Service Provider, as well as by Oncor at will. This allows the Service Provider to avoid resubmitting a new program addendum each program year; however, it does require the Service Provider to submit updated company documentation for each program year through EEPM. It is solely the responsibility of the Service Provider to make Oncor aware of changes required to their company documentation and provide copies of such documentation in their EEPM account under their company profile. Failure to provide documentation may be a breach of the program addendum, which can be grounds for termination of the addendum with the Service Provider.

**The program addendum does not in any way guarantee the Service Provider funding during the program year of the current program application. The program addendum does not in any way obligate Oncor to the CSOP.**

### ***8.1.3 Requirements for New and Returning Service Providers***

New and returning service providers approved to participate in the CSOP are required to read the current CSOP Program Manual and review other related commercial project guidelines and training videos located on the EEPM portal at <https://eepm.oncor.com>. The service provider project managers and service provider inspection contacts may be required to participate in additional training, as determined by the Oncor program manager.

**New service providers will be limited to one initial project submittal in our EEPM system.**

Subsequent and multiple project submittals may be allowed based upon successful completion of the service provider's first project and compliance with Oncor program requirements, and/or at the sole discretion Oncor. Service providers that demonstrate poor project performance and fail to follow Oncor program rules may, at Oncor's sole discretion, have limitations placed on the submittal of future projects and may not be approved for program participation in future program years.

### ***8.1.4 Customer Protection***

Each energy efficiency service provider that provides energy efficiency services to end-use customers shall provide the disclosures and include the contractual provisions required by PUCT Substantive Rule 25.181 (s). In part, clear disclosure to the customer shall be made regarding the following:

- the fact that incentives are made available to the energy efficiency services provider through a program funded by utility customers, manufacturers or other entities and the amount of any incentives provided by the utility, and
- the amount of any incentives that will be provided to the customer.

## **8.2 Termination of Program Addendums**

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Oncor may terminate any or all program addendums, in whole or in part, at any time in its sole discretion, by providing written notice of termination to the service provider. The notice of termination will specify the effective date of any termination and that the program addendum is terminated in its entirety.

In the event a program addendum is terminated by Oncor, the service provider will finish any project already commenced that cannot be discontinued without breaching the Customer Agreement. Oncor will have no obligations with respect to any contractual obligations entered into between the host customer and service provider after the service provider's receipt of Oncor's notice of termination.

In the event the program is terminated, Oncor's only liability will be to pay the service provider the unpaid balance due to the service provider for the portion of a project already commenced that cannot be discontinued without breaching the Customer Agreement.

Oncor may refuse a service provider the opportunity to complete a program application and program addendum in the CSOP for any reason in Oncor's sole discretion, including based on the service provider's prior participation in the program or any other energy efficiency program offered by Oncor or another utility sponsor. Please refer to the umbrella contract and program addendum for actual termination provisions. Please note this section is only a summary of certain terms in the umbrella contract and program addendum, and the terms of the actual umbrella contract and program addendum supersede and control over this summary in the event of any conflict.

## 9 PROGRAM RESOURCES

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- Oncor website: [www.oncor.com](http://www.oncor.com)
- Oncor Service Provider EEPM website and portal: <https://eepm.oncor.com>
- Oncor Customer energy efficiency website: [www.takealoadofftexas.com](http://www.takealoadofftexas.com)
- EEPM Support Team: [eepmsupport@oncor.com](mailto:eepmsupport@oncor.com) or 866-258-1874
- EEPM Insurance: [eepminsurace@oncor.com](mailto:eepminsurace@oncor.com) or 866-258-1874
- Public Utility Commission of Texas (PUC) Electric Substantive Rules: [www.puc.texas.gov/agency/rulesnlaws/subrules/electric/Electric.aspx](http://www.puc.texas.gov/agency/rulesnlaws/subrules/electric/Electric.aspx)
- Texas Technical Reference Manual (TRM): <https://texasefficiency.com/trm-docs/>
- Electric Reliability Council of Texas (ERCOT): [www.ercot.com](http://www.ercot.com)