



BEEETS

BPA Energy Efficiency Tracking System

Invoicing & Performance Payment Guide v2.0



The purpose of this guide is to provide BPA customers with a basic understanding of how to invoice EEI Payments and Performance Payments through BEETS. This guide assumes users have a basic understanding of BEETS and how it works. For more general instruction around how to use BEETS, visit the [BEETS Landing Page](#) > [Training Materials & Support Resources](#) for additional resources, or contact the BPA Team for assistance.

TIPS:

- *We recommend all new users of BEETS scan through the document and table of contents to **orient themselves on the content covered.***
- *Utilize **'Ctrl – F'** to search for topics or terms you may be seeking guidance around.*
- *Click on [Hyperlinks](#) throughout the document to take you to other relevant information.*
- *Click on **'Return to Table of Contents'** button at the bottom of each page to help navigate.*

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What's Changing?

Changes to EEl reporting, invoicing and
Performance Payment processes with BEETS

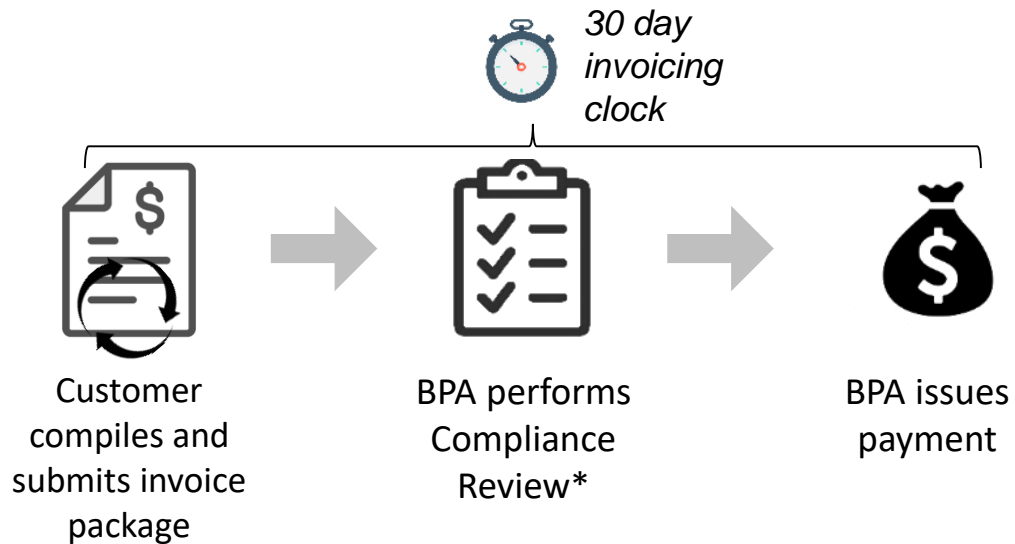


What's Changing – EE Reporting & Invoicing Process

With the introduction of BEETS in 2022, the EE Reporting process and Payment terms are changing. See below for a summary of the changes that have been instituted. Instructions on how to submit an invoice EEl payment in the new process are [here](#).

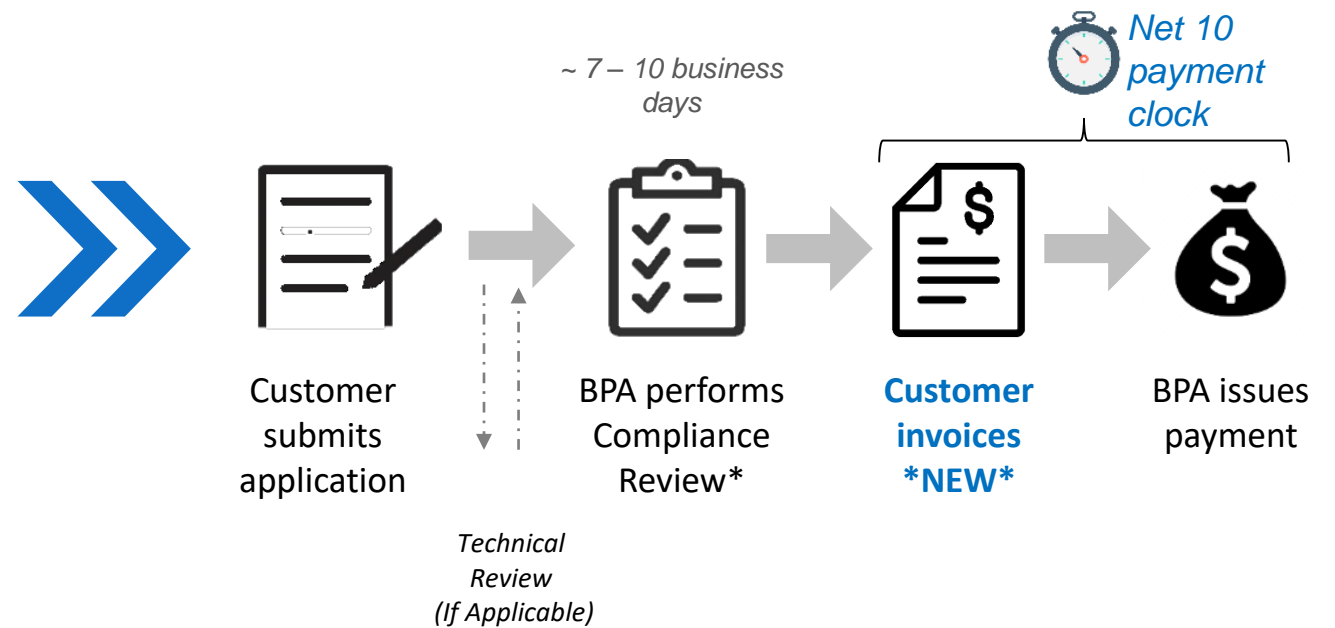
Past (IS2.0)

Customers always get paid at 30 days



Future (BEETS)

Customers could get paid in LESS than 30 days



What's Changing – Performance Payments (1 of 2)

With the introduction of BEETS in 2022, the Performance Payment process will now be separated from the EE Reporting and Invoicing process. This will require allocation of EEI funds to a Performance Payment budget and submittal of a separate invoice. Instructions on how to submit for Performance Payment in the new process are [here](#). More details around the process follow.

Past (IS2.0)

Automatic, but not flexible

Automatic payment issued, or submit request to opt out

One bucket of funding for all payments

Same invoice for EEI and Performance Payments



Current (BEETS)

More steps, more flexibility

Customers control if, when, and how much is paid

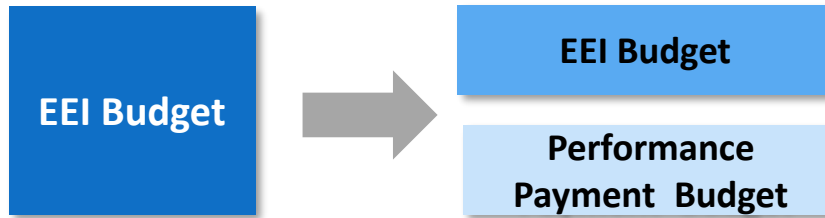
Separate EEI & Performance Payment funds

Separate EEI & Performance Payment invoices



Allocate Performance Payment Budget

Utility allocates desired EEI funds to Performance Payment Budget at any time during rate period (up to cap).



Earn Performance Payments

1. Utility submits measure(s) for approval.
2. Utility invoices measure(s) at any time.
3. Available Earned Performance Payment amount increase.



Claim Performance Payments

1. Utility validates sufficient earned & allocated Performance Payment funds.
2. Utility submits Performance Payment Invoice.*
3. BPA pays out Performance Payment funds (net 10).



**Invoices submitted with insufficient funds will need to be resubmitted*

Key Invoicing Dashboards

How to work with key dashboards needed in the invoicing process



Dashboard Widgets Required for Invoicing

There are two Dashboard Widgets that are essential to ensuring the utility has enough budget to invoice and subsequently see the details on payments on the invoice.

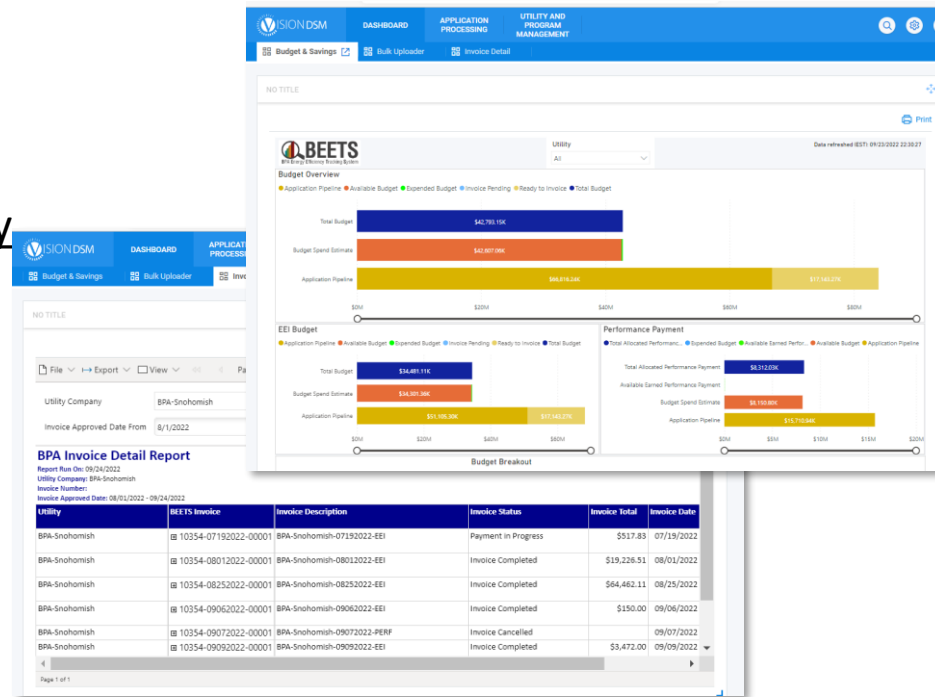
If you have not already done so during setup, click [here](#) for instructions on how to add these dashboard widgets.

Key Invoicing Dashboard Widgets:

Budget & Savings Dashboard (i.e. PowerBI Report):

Summary of Utility EEI and Performance Payment budgets and savings data; referenced to ensure utility has enough funds prior to invoicing.

Invoice Dashboard (i.e. Paginated Report): Provides visibility into the invoice status and line item detail of applications included in a particular invoice.



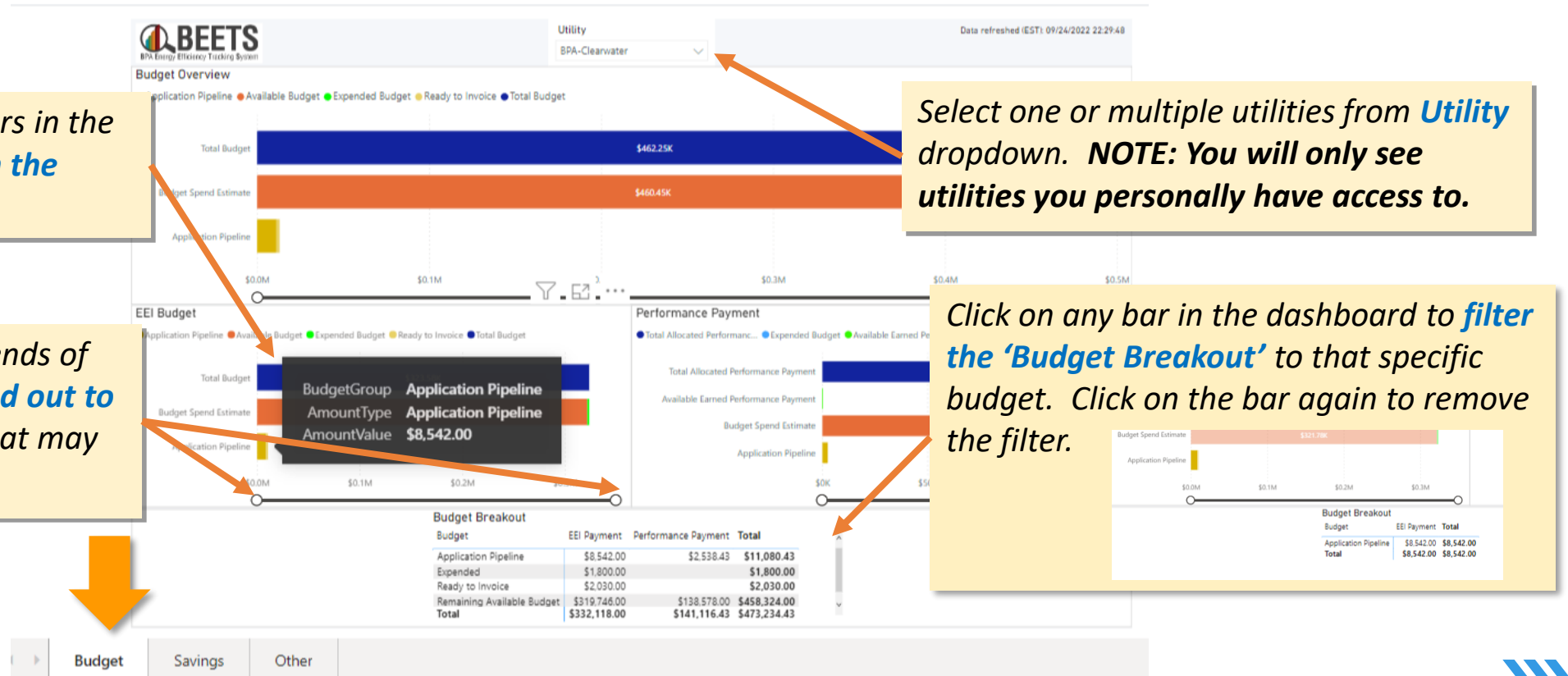
IMPORTANT NOTE: BEETS dashboards DO NOT update in real time; dashboards refresh every 2 – 3 hours, however, invoices process nightly so impacted budget data won't be reflected until the next day.

Invoicing Dashboards: Budget & Savings (PowerBI Report)

Budget & Savings Dashboard Overview

The Budget & Savings Dashboard (aka the PowerBI Report) includes EEI and Performance Payment budget data that should be referenced during the Invoicing process. [Click here](#) for instructions on how to add the Budgets and Savings Dashboard. See the following pages for deep dives into each section and definitions.

IMPORTANT NOTE: BEETS dashboards DO NOT update in real time; some within system data elements refresh every 2 – 3 hours, however, elements related to invoicing update nightly due to the timing of BPA invoice and payment cycle.



Hover over any of the bars in the charts and a **popup with the amount** will appear.

Select one or multiple utilities from **Utility** dropdown. **NOTE: You will only see utilities you personally have access to.**

Click and drag circles at ends of the graphs to **zoom in and out to view smaller numbers** that may not be visible in chart.

Click on any bar in the dashboard to **filter the 'Budget Breakout'** to that specific budget. Click on the bar again to remove the filter.

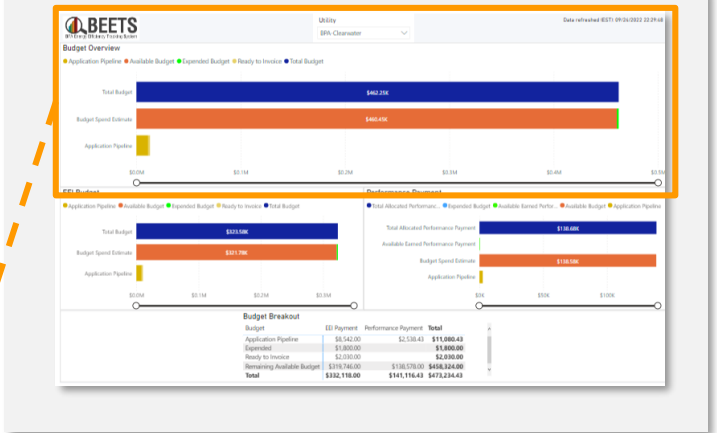
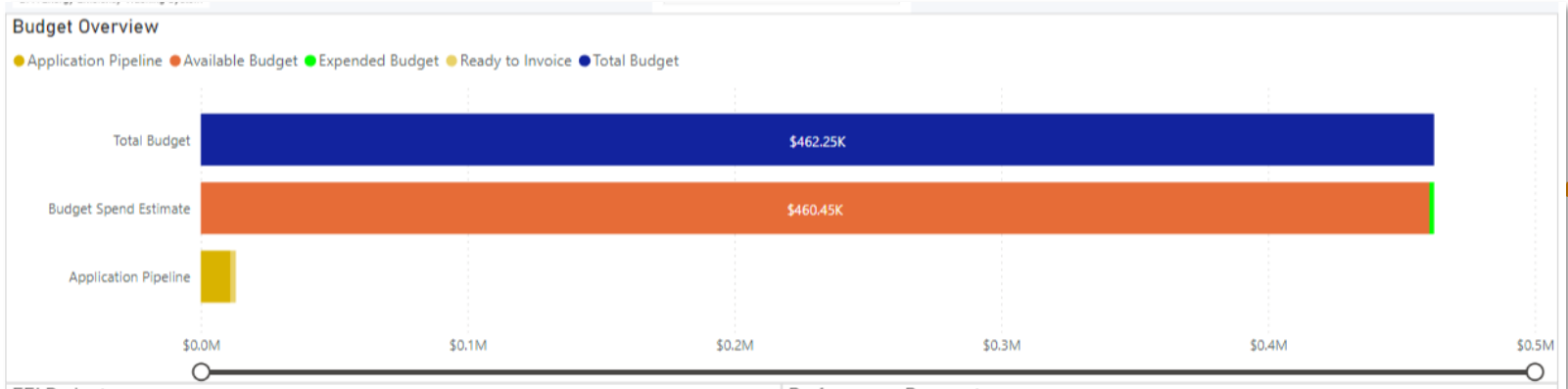
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'Savings' Dashboard is pending development



Budget Dashboard – Budget Overview Section

The Budget Overview section is an aggregate view of budgets across both EEI and Performance Payments.

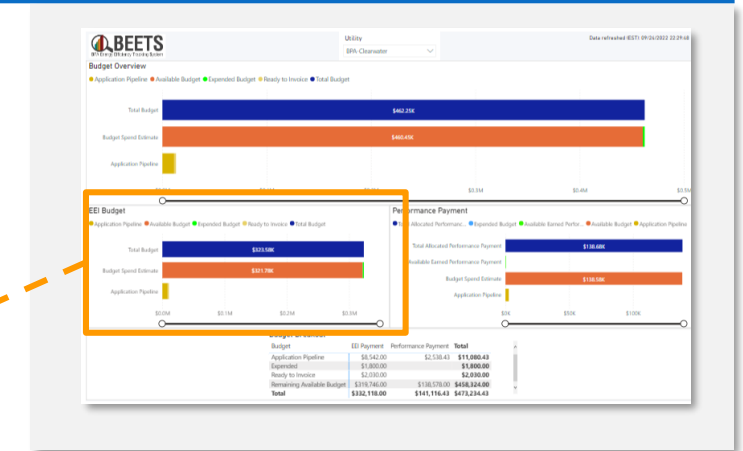
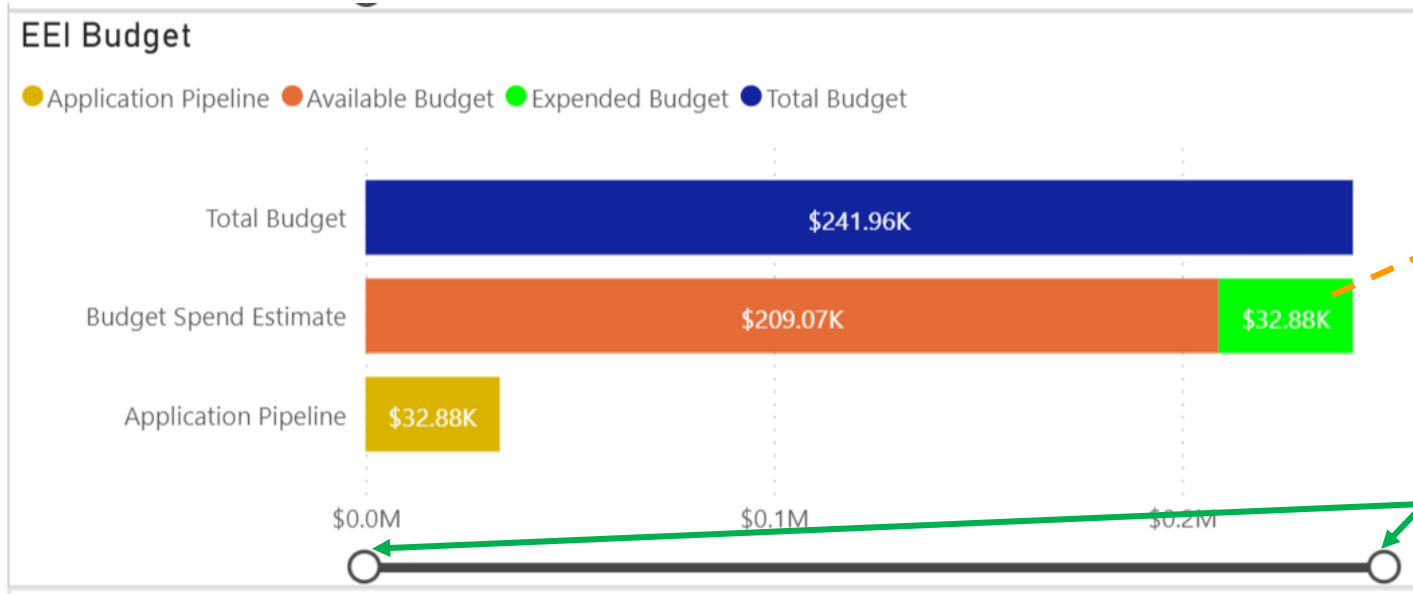


Budget Overview Section

- **Total Budget** = Total EEI Budget + Total Allocated Performance Payment Budget (i.e. “implementation budget”)
- **Budget Spend Estimate** = Available Budget + Expended Budget + Invoice Pending (see below)
 - **Available Budget** = Total Budget (EEI + Allocated Performance Payment Budget) – Expended Budget (EEI + Performance Payment) - Invoice Pending (EEI and Performance Payment)
 - **Expended Budget:** Sum of fully processed EEI and Performance Payment Invoices
 - **Invoice Pending:** Approved EEI and Performance Payments that are awaiting nightly load to BPA financial systems
- **Application Pipeline:** Sum of all in process EEI & Performance Payments in BEETS not yet approved for payment (i.e. before READY TO INVOICE status)

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The EEI Budget section provides more details into the breakdown of the EEI budget.



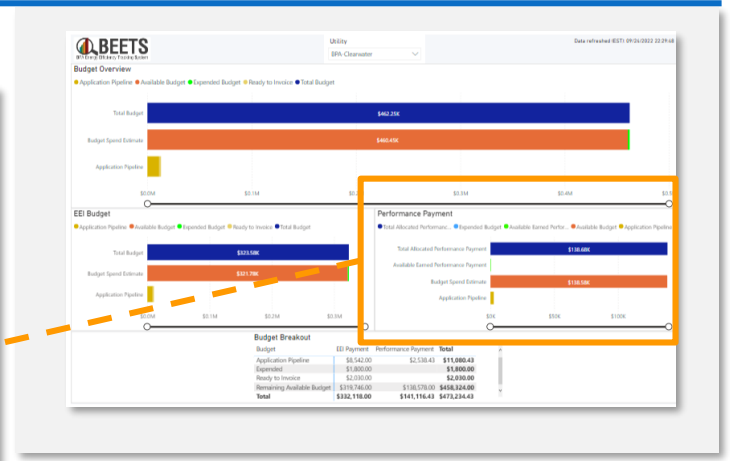
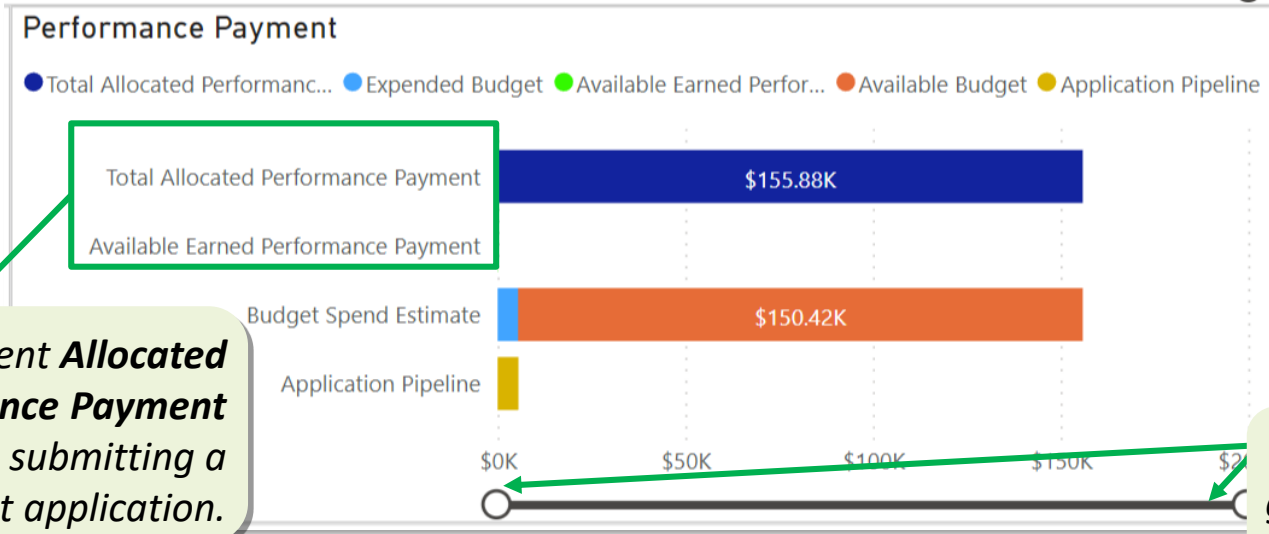
💡 Click and drag circles at ends of the graphs to zoom in and view smaller numbers that may not be visible in chart.

EEI Budget Section

- **Total Budget** = Budget amount allocated to EEI
- **Budget Spend Estimate** = Available Budget + Expended Budget + Invoice Pending (see below)
 - **Available Budget**** = Total EEI Budget – Expended EEI Budget – EEI Invoice Pending ****REFERENCE 'AVAILABLE BUDGET' BEFORE SUBMITTING AN EEI INVOICE**
 - **Expended Budget**: Sum of of fully processed EEI Invoices
 - **Invoice Pending**: Approved EEI payments that are awaiting nightly load to BPA financial systems
- **Application Pipeline (HEADER)**: Sum of all in process EEI Payments in BEETS not yet approved for payment (i.e. through READY TO INVOICE status)

Budget Dashboard – Performance Payment Budget

The Performance Payment section provides more details into the breakdown of the Performance Payment budget.



💡 **Validate sufficient *Allocated & Available Performance Payment* funds before submitting a Performance Payment application.**

💡 **Click and drag circles at ends of the graphs to zoom in and view smaller numbers that may not be visible in chart.**

Performance Payment Budget Section

- **Total Allocated Performance Payment:** Budget amount allocated to Performance Payments (will not exceed cap)
- **Available Earned Performance Payment:** Amount of Performance Payments earned that have not yet been invoiced
- **Budget Spend Estimate = Available Budget + Expended Budget + Invoice Pending** (see below)
 - **Available Budget**** = Total Perf Payment Budget – Expended Perf Payment Budget – Perf Payment Invoice Pending
 - **Expended Budget:** Amount of fully processed Performance Payment invoices
 - **Invoice Pending:** Approved Performance Payments that are awaiting the nightly load to BPA financial systems
- **Application Pipeline:** Sum of potential Earned Performance Payments associated with applications in BEETS that are not yet invoiced.

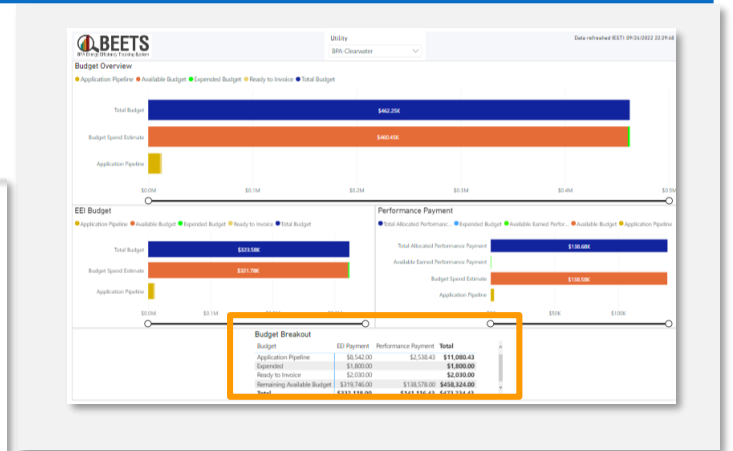
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Budget Dashboard – Budget Breakout

Scroll down on Budget & Savings Dashboard in BEETS to view Budget Breakout table that Provides a summary view of the bar charts in the dashboard.

Budget Breakout

Budget	EEI Payment	Performance Payment	Total
Application Pipeline	\$32,882.00	\$5,507.37	\$38,389.37
Expended	\$32,882.00	\$5,453.07	\$38,335.07
Remaining Available Budget	\$209,073.62	\$150,421.93	\$359,495.55
Total	\$274,837.62	\$161,382.37	\$436,219.99



Budget Breakout Section

- **Application Pipeline:** Sum of all in process EEI payments and Performance Payments in BEETS not yet approved for payment (i.e. through READY TO INVOICE)
- **Expended:** Sum of fully processed EEI and Performance Payment invoices
- **Ready to Invoice:** Sum of pending EEI payments and Performance Payments that have been approved by BPA and are ready to be invoiced.
- **Remaining Available Budget:** Total Budgets – Expended Budgets – Pending Amounts

PLACEHOLDER
Feature under development

Invoicing Dashboards:

Invoice Dashboard (Paginated Report)

The Invoice Dashboard (i.e. Paginated Report) provides visibility to the line item detail of applications included in a particular invoice. Application details will appear in this report once the invoice has been created after business hours.

Summary of Steps:

1. Log into BEETS.
2. From the home page, click on the *Dashboard* tab (if not already selected). **A**
3. Go to the *Invoice Dashboard* that you previously set up (if not yet set up, see instructions [here](#)). **B**
4. Select appropriate *Utility Company*. **C**
5. Select desired *Invoice Approved Date From* & *To* by clicking on the respective calendar icons. **D**
6. Click *View Report* button. **E**

The screenshot shows the BEETS application interface. The top navigation bar includes 'VISION DSM', 'DASHBOARD' (marked with 'A'), 'APPLICATION PROCESSING', and 'UTILITY AND PROGRAM MANAGEMENT'. Below this, there are tabs for 'Budget & Savings Dashboard' and 'Invoice Detail' (marked with 'B'). The main content area is titled 'NO TITLE' and contains a search and filter section with 'File', 'Export', 'View', and 'Parameters' options. Below this is a form with several fields: 'Utility Company' (Required, marked with 'C'), 'Invoice Number' (Required, with a 'Null' checkbox), 'Invoice Approved Date From' (Required, marked with 'D'), and 'To' (Required, marked with 'D'). A 'View report' button (marked with 'E') is located on the right side of the form.

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Click **View** to switch between **Web Layout** and **Print Layout** view.

Click **Export** to export report details in multiple formats.

Click **Print** to print report.

Click **Parameters** to show/hide report filter details.

Utility	BEETS Invoice	Invoice Description	Invoice Status	Invoice Total	Invoice Date	Date Approved	Date Paid
BPA-Consumers	10118-09152022-00001	BPA-Consumers-09152022-EEI	Payment in Progress	\$600.00	09/15/2022	09/15/2022	
BPA-Gravs Harbor	10191-09122022-00001	BPA-Gravs Harbor-09122022-EEI	Invoice Completed	\$19,218.22	09/12/2022	09/12/2022	09/21/2022

Summary of Steps, continued:

7. All invoices within that data range will appear with the following details:

- (A) BEETS Invoice** – unique system generated invoice number
- (B) Invoice Description** – system generated invoice description that includes in 1) Invoice Approval Date & 2) EEI (to indicate an EEI Payment or Self-Funded invoice), or PERF (to indicate Performance Payment invoices)*;
- (C) Invoice Status** – Status of invoice; will be either: 1) Payment in Progress (i.e. received by BPA Finance), 2) Invoice Completed (i.e. payment issued), or 3) Invoice Canceled.
- (D) Invoice Total** – Amount of EEI payment included on an invoice
- (E) Invoice Date** – Date invoice was created
- (F) Date Approved** – Date that the utility approved the payment
- (G) Date Paid** – Date the payment was issued to the utility

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Utility	BEETS Invoice	Invoice Description	Invoice Status	Invoice Total	Invoice Date	Date Approved	Date Paid
BPA-Consumers	<input checked="" type="checkbox"/> 10118-09152022-00001	BPA-Consumers-09152022-EEI	Payment in Progress	\$600.00	09/15/2022	09/15/2022	
BPA-Grays Harbor	<input type="checkbox"/> 10191-09122022-00001	BPA-Grays Harbor-09122022-EEI	Invoice Completed	\$19,218.22	09/12/2022	09/12/2022	09/21/2022

Program Name	Project #	Project Name	Savings (KWh)	EEI Savings (KWh)	Payment Amount	Self-funded Savings (KWh)	Application Approval Date	Project Completion Date
Non Residential Lighting	YZLCCR1550004124		151,724.17		\$19,170.00	0.00	08/10/2022	07/08/2022
UES Measures	YZUEPS1550001002		1,205.60		\$700.00	0.00	08/08/2022	06/30/2022

Summary of Steps, continued:

8. Click on sign next to Invoice Number to view invoice line item details (i.e. application level):

- I** Program Name – Program the application was reported under
- J** Project # - unique application number of line item
- K** Project Name – user defined project/application name
- L** EEI Savings (kWh) – EEI funded kWh savings of associated application
- M** Payment Amount – Payment amount of associated application
- N** Self-funded Savings – kWh associated with self funded portion of the savings
- O** Application Approval Date – date associated application was approved
- P** Project Completion Date – application completion date reported by utility

9. Click on the sign next to the *Invoice Number* to close invoice details and return to the summary view.

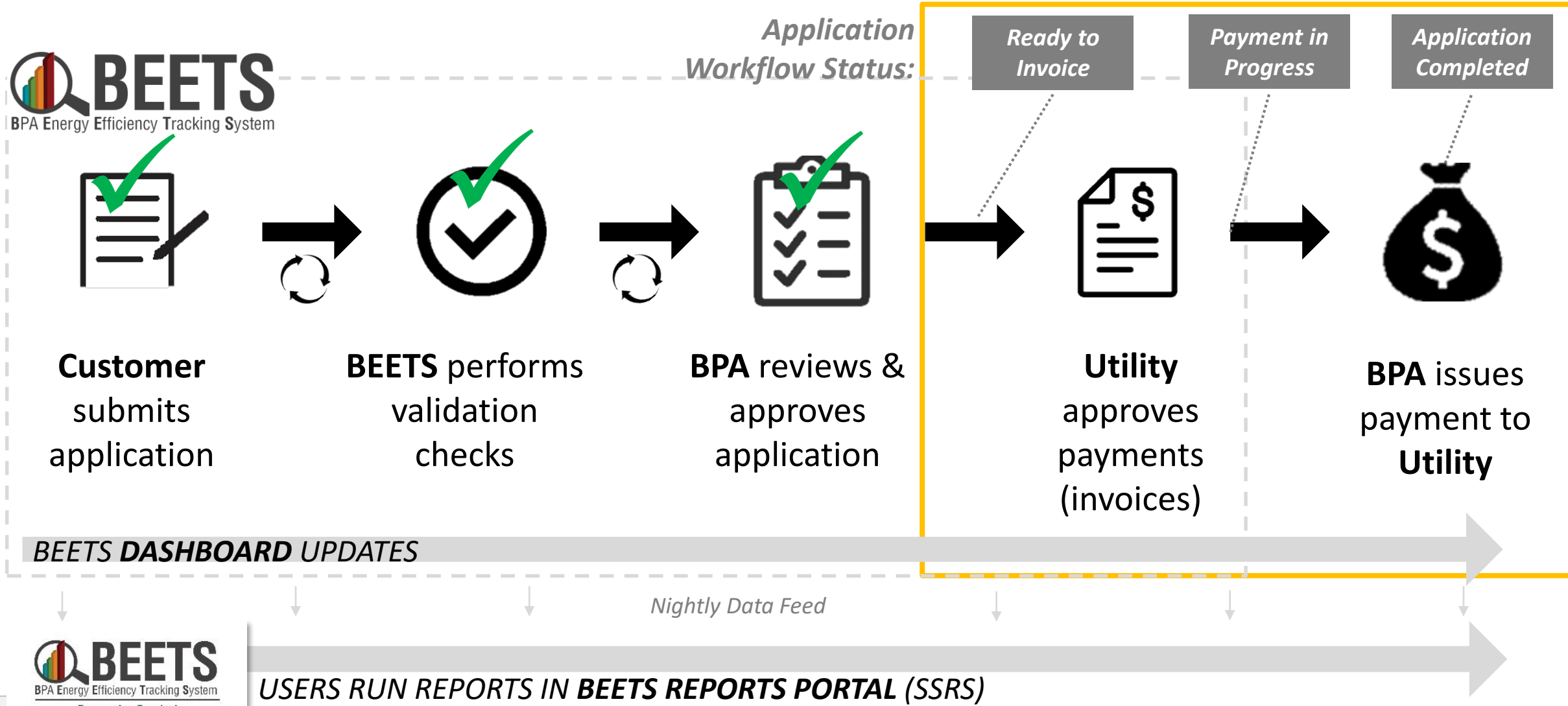
EEI Payment Approval (Invoicing)

How to approve EEI payments for invoicing



EEI Payment Approval Process (i.e. Invoicing)

Once an application has been approved by BPA, the customer can now proceed with the invoicing process at any time. This is now a separate step in BEETS. See [here](#) for more information on changes to the process. Guidance on how to invoice follows.



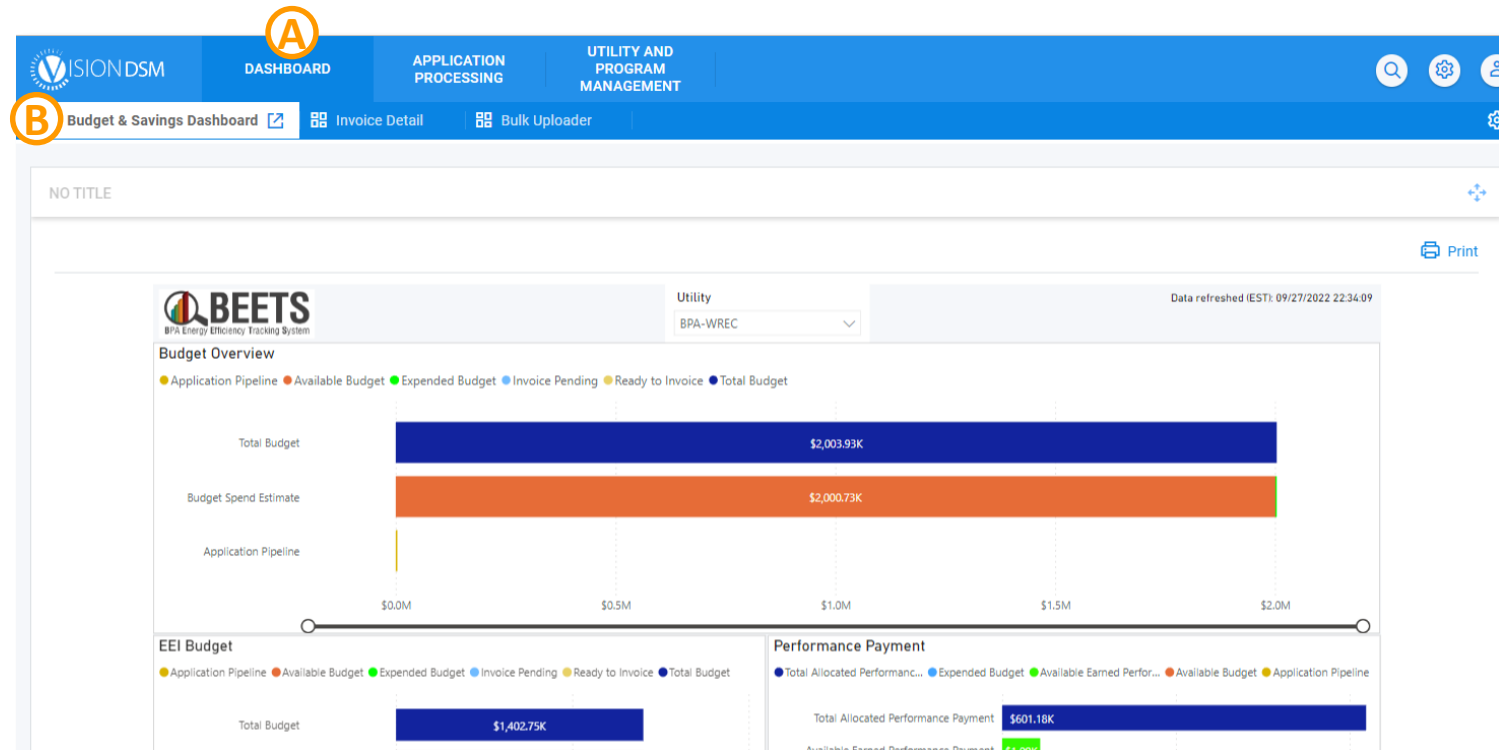
EEI Payment Approvals: Verifying EEI Budget

In BEETS, in order to receive EEI payment, the customer will first need to verify sufficient EEI budget before invoicing. Instructions on how to verify budget on the Budget and Savings Dashboard follow.

IMPORTANT: Prior to completing the [EEI payment approval process](#), **you must ensure that the utility has enough funds in the EEI Budget to cover the requested payment.** If it does not, BEETS will cancel the invoice during the evening processing period, and the associated application will be returned to the pending payment approval screen.

Summary of Steps:

1. Log in to [BEETS](#).
2. Ensure the Dashboard tab is selected. **A**
3. Click on the Budget & Savings Dashboard. **NOTE: if you do not have this visible, follow instructions [here](#) to add this view to your Dashboard.** **B**



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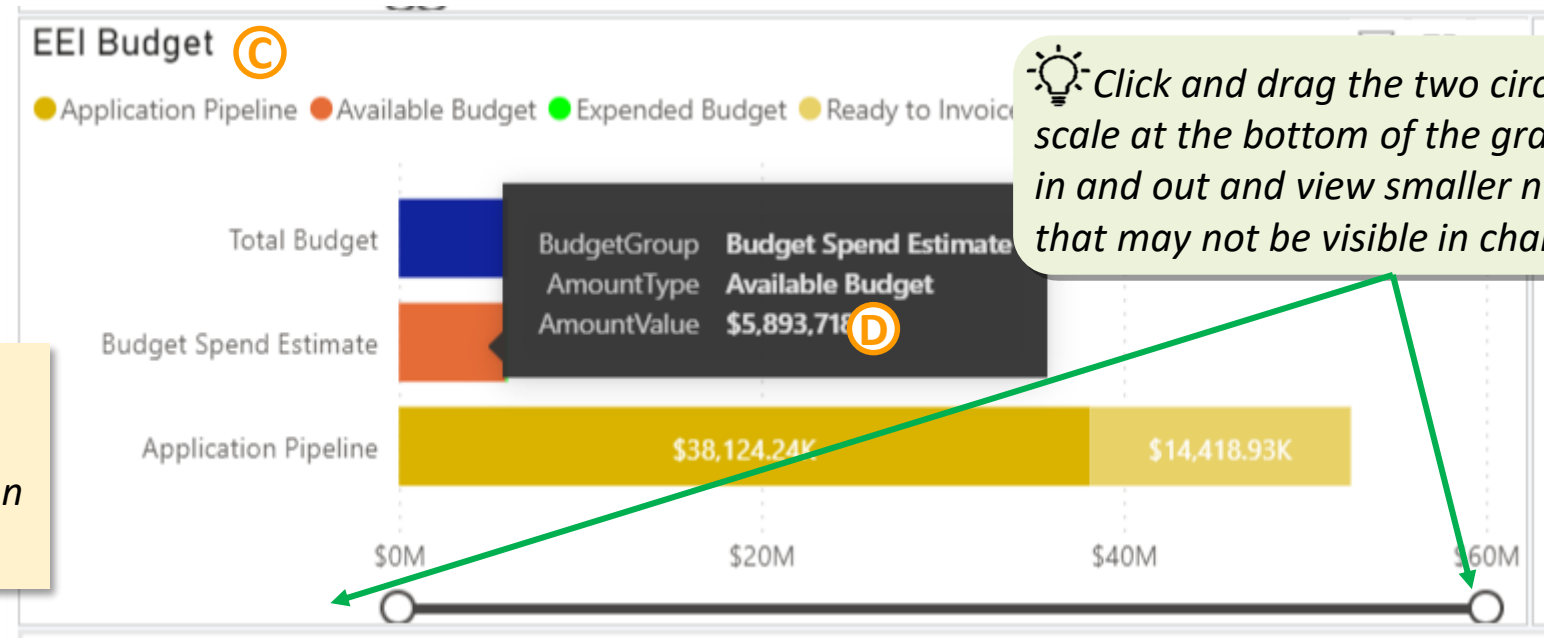


Summary of Steps, continued:

4. Scroll down and to the right to navigate to the *EEI Budget* section of the dashboard. Ⓒ
5. Hover over the *Available Budget*, which is part of the *Budget Spend Estimate* bar on the chart to view the budget amount that is left for you to invoice against; you may need to click and drag the circles under the graph to see smaller amounts (see note below). Ⓓ
6. Before you approve an EEI Payment, you must verify that the amount you are requesting does not exceed the available budget or your invoice will be cancelled during the evening processing period, and the associated application will be returned to the pending payment approval screen.
7. Once you verify you have sufficient EEI budget, you may proceed with [approving EEI payments.](#)

END

!! IMPORTANT !! Dashboard budgets may take up to 24 hours reflect updates from the application & payment approval processes.




EEl Payment Approval: Approving EEl Payments

Approving EEI Payments for Invoicing (1 of 6)

Complete the following steps to approve EEI payments for Invoicing.

Summary of Steps:

1. Log into [BEETS](#).
2. From the home page, click on the *Utility and Program Management* tab. **A**
3. Click on the *Utility* that you like to submit an invoice for (most users will only see one listed, unless you work with multiple utilities). **B**
4. The utility page will appear; click on the *Payment Approvals* tab up top. **C**

 *If you do not see the payment approvals tab, you may need to unhide it by clicking the gear icon. If still not available, contact BPA as your permissions may need to be adjusted.*

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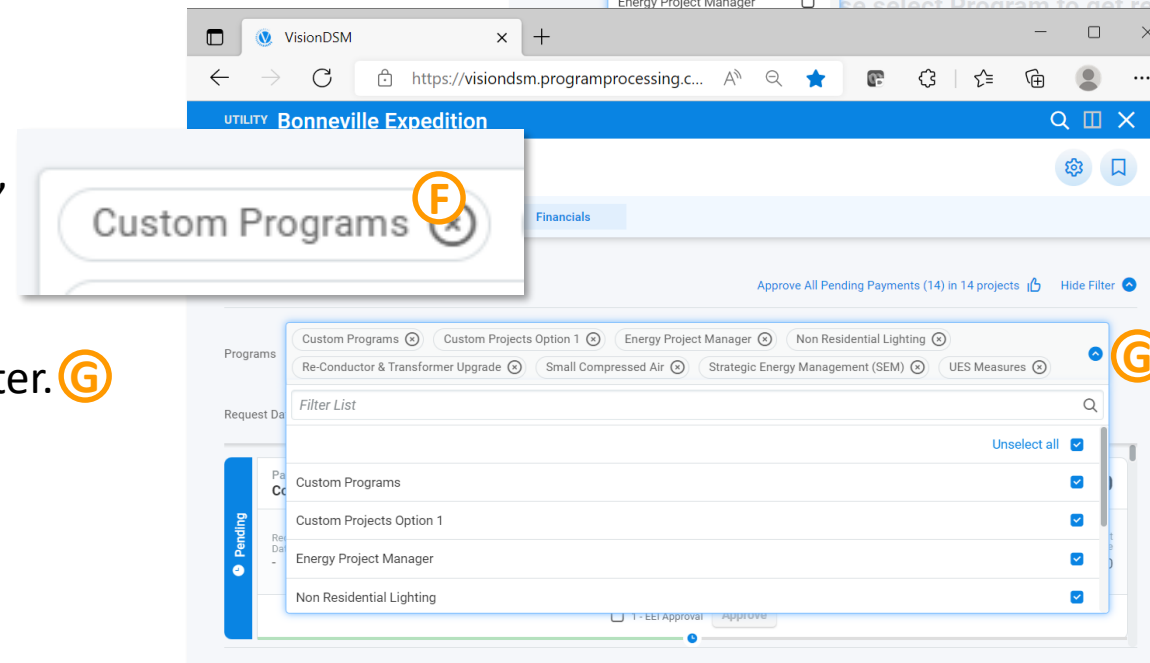
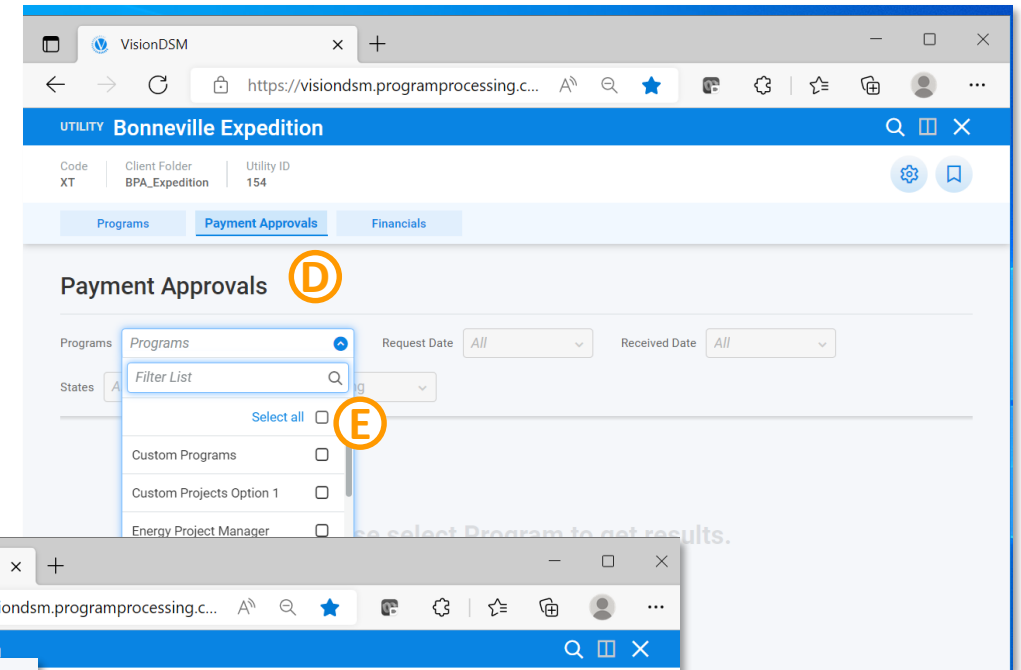
The image displays three sequential screenshots of the VisionDSM web application interface. The top screenshot shows the main navigation menu with the 'UTILITY AND PROGRAM MANAGEMENT' tab highlighted by a red circle 'A'. The middle screenshot shows a table of utilities with 'Bonneville Expedition' highlighted by a red box and a red circle 'B'. The bottom screenshot shows the 'Bonneville Expedition' utility page with the 'Payment Approvals' tab highlighted by a red circle 'C' and a red arrow pointing to the gear icon in the top right corner of the page header.



Summary of Steps, continued:

5. The *Payment Approvals* window; click on the *Programs* dropdown. **(D)**
6. *Select All* or select individual programs that you would like to invoice for. **(E)**
7. You will see a window showing all programs you have selected; if desired, click the X to the right of the program name to remove from the filter. **(F)**
8. Click the blue upward arrow to hide filter. **(G)**

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Summary of Steps, continued:

- All filtered and approved applications that are in **READY TO INVOICE** status will appear (i.e. ready to submit for payment); application payment and savings details will be viewable. Ⓜ
- Ensure 'Pending' or 'All' are selected in the *Request Status* dropdown (see note to the right). ⓘ

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Payment Approvals

Programs: Non Residential Lighting, Re-Conductor & Transformer Upgrade, Small Compressed Air

Request Date: All, Received Date: All, States: All, Request Status: Not Pending

Received Date	Bill Account	Project Name & ID	Measure	KW Impact	KWH Impact	Therm Impact	Peak Therm Impact	Measure Incentive	Project Incentive
-	-	Mountain Meadow Auto Body Shop	EEI Payment	0	6294.8	0	0	\$360.00	\$360.00

Total: \$360.00

'Not Pending' Request Status allows users who do NOT have payment approval permissions to have read only visibility. If you should have permissions to approve payments, but only see results when 'Not Pending' is selected from drop down, contact BPA for support.

Request Date dropdown allows users to filter by application approval date (i.e. when it moved to Ready to Invoice).

Payment Approvals

Programs: Custom Programs, Custom Projects Option 1, Energy Project Manager, Non Residential Lighting, Re-Conductor & Transformer Upgrade, Small Compressed Air, Strategic Energy Management (SEM), UES Measures

Request Date: All, Received Date: All, States: All, Request Status: Pending

Received Date	Bill Account	Project Name & ID	Measure	KW Impact	KWH Impact	Therm Impact	Peak Therm Impact	Measure Incentive	Project Incentive
-	90210	Success Test	EEI Payment	0	54528	0	0	\$19,084.80	\$19,084.80

Total: \$19,084.80



Click and drag scroll bar to view more pending payments.

ⓧ *Not useful for BEETS users; ensure "All" is selected.*



Summary of Steps, continued:

11. If desired, navigate the associated application details from the *Payment Approval Page* by following the instructions below:

- Click on the blue *application number* to open the application page. 
- To return to the payment approvals screen, click on the utility bookmark at the bottom. 

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Payment Approvals Approve All Pending Payments (14) in 14 projects Hide Filter

Programs: Custom Programs, Custom Projects Option 1, Energy Project Manager, Non Residential Lighting, Re-Conductor & Transformer Upgrade, Small Compressed Air, Strategic Energy Management (SEM), UES Measures

Request Date: All, Received Date: All, States: All, Request Status: Pending

Received Date	Bill Accty	Project Name & ID	Measure	KW Impact	KWH Impact	Therm Impact	Peak Therm Impact	Measure Incentive	Project Incentive
-	902	Data Validation Success Test XTRTPS1550262963	EEI Payment	0	54528	0	0	\$19,084.80	\$19,084.80

Status Updated: Sep 13, 2022, 7:51 PM | Last Edited: Sep 13, 2022, 7:51 PM | Received: Sep 13, 2022, 7:51 PM

Project Name: Data Validation Success Test | App ID: 83A1A54FD84248B1B6970303EB8241F4 | Customer: Nathan Kelly | Utility: Bonneville Expedition

Flags (1): Lock Application | Tags (1): oversight_conducted

Workflow: **Ready to Invoice** (Processing mode: Standard)

1 TASKS TO DO (1 AUTOMATED, 0 DEPENDENT) | 6 TASKS COMPLETED (6 AUTOMATED)

Switch ON tasks to see the list

UTILITY AND PROGRAM M... All Utilities | APPLICATION XTRTPS15502...



Summary of Steps, continued:

12. When ready, to select application(s) for payment:

- Click 'Approve All Pending Payments' to approve all applications in **READY TO INVOICE** status, **or** **L**
- Click '1 – EEI Approval' next to each pending payment to select applications individually for approval. **M**

Payment Approvals Approve All Pending Payments (15) in 15 projects

Programs: Custom Programs, Custom Projects Option 1, Energy Project Manager, Non Residential Lighting, Re-Conductor & Transformer Upgrade, Small Compressed Air, Strategic Energy Management (SEM), UES Measures

Request Date: All, Received Date: All, States: All, Request Status: All

Received Date	Bill Account	Project Name & ID	Measure	KW Impact	KWH Impact	Therm Impact	Peak Therm Impact	Measure Incentive	Project Incentive
-	90210	Success Test XTRTPS155026			54528	0	0	\$19,084.80	\$19,084.80

Payee: Expedition Program: Re-Conductor & Transformer Upgrade Total: \$19,084.80

1 - EEI Approval **Approve**

13. A confirmation summary will appear with the payment totals of selected applications at the bottom. **N**

14. Click 'Approve Checked' button to approve (or cancel to reset). **O**

Payee: Expedition Power Program: Strategic Energy Management (SEM) Total: \$13,632.00

Received Date	Bill Account	Project Name & ID	Measure	KW Impact	KWH Impact	Therm Impact	Peak Therm Impact	Measure Incentive	Project Incentive
-		Data Validation Success test 2 XTEMCR1550262625	EEI Payment	0	545280	0	0	\$13,632.00	\$13,632.00
-			SEM Annual Savings	0	0	0	0	\$0.00	\$0.00

1 - EEI Approval **Approve**

1 - EEI Approval **Approve**

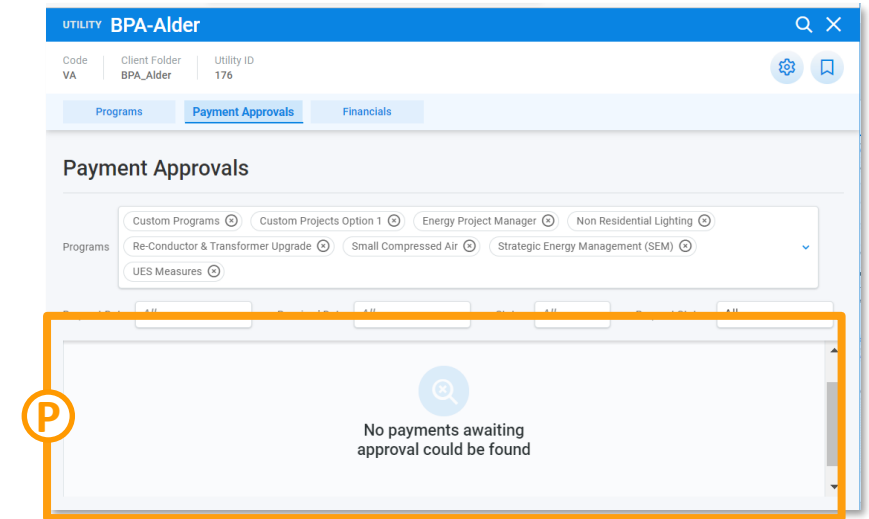
Check all pending payments (15) **Approve Checked** **Cancel**

Total: \$17,040.00

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Summary of Steps, continued:

15. The approved application(s) will no longer display in the Payment Approval screen. **P**
16. BEETS will then perform an automated check nightly to ensure the utility has sufficient EEI Budget available:
 - a. If utility has sufficient EEI Available budget:
 - The approvals for that day will be bundled into a single invoice,
 - The newly created invoice will be reflected on the [Invoice Dashboard](#) (on the Dashboard) by the next day.
 - Payment will be issued in Net 10 business days. See [Monitoring EEI Payment Invoicing Progress](#) for visibility into process.
 - b. If the utility does NOT have sufficient EEI Available budget:
 - a. An email notification will be sent, and
 - b. The associated pending application payment will be returned to the payment approvals screen and made available again to request a new invoice when budget is available. **END**



EEI Payment Approval: Monitoring EEI Payment Invoicing Progress

Guidance on how the EEI Invoicing process status is reflected on the Budget and Savings Dashboard, Invoice Dashboard, and associated Application Page

Monitoring EEI Payment Invoicing Progress Introduction

As an application is approved by BPA and goes through the payment approval process, there are multiple areas of the system that update to reflect the progress of the payment. The following instructions provides visibility into these updates and where to find them.

PAYMENT APPROVALS PAGE & APPLICATION PAGE UPDATES:

Payment Approvals Page

Application Page
(Workflow Status & Payments Tab)

DASHBOARD UPDATES:

Budget Dashboard

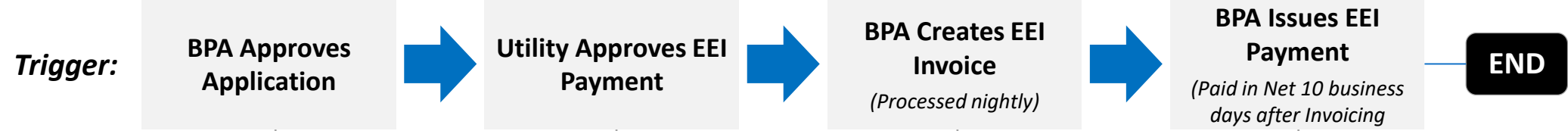
Invoicing Detail Report



EI Payment Invoicing Process - Dashboard Updates

Summary view of updates made to the Budget Dashboard & Invoice Dashboard along the application and EEI payment approval process.

NOTE: This does not apply to Performance Payment applications.



Invoice Dashboard	N/A – No Visibility	N/A – No Visibility	Invoice Status: Payment in Progress	Invoice Status: Invoice Completed
EEI Budget (Budget Dashboard)	Application Pipeline ↓ Ready to Invoice ↑ Invoice Pending ⇔ Available Budget ⇔ Expended Budget ⇔	<i>Application Pipeline ⇔</i> <i>Ready to Invoice ⇔</i> <i>Invoice Pending ⇔</i> <i>Available Budget ⇔</i> <i>Expended Budget ⇔</i>	<i>Application Pipeline ⇔</i> Ready to Invoice ↓ Available Budget ↓ Expended Budget ↑	<i>Application Pipeline ⇔</i> <i>Ready to Invoice ⇔</i> <i>Available Budget ⇔</i> <i>Expended Budget ⇔</i>
Performance Payment Budget (Budget Dashboard)*	Allocated Perf Payment ⇔ Expended Budget ⇔ Available Earned Perf Payment ⇔ Available Budget ⇔ Application Pipeline ⇔	<i>Allocated Perf Payment ⇔</i> <i>Expended Budget ⇔</i> <i>Available Earned Perf Payment ⇔</i> <i>Available Budget ⇔</i> <i>Application Pipeline ⇔</i>	<i>Allocated Perf Payment ⇔</i> <i>Expended Budget ⇔</i> Available Earned Perf Payment ↑ <i>Available Budget ⇔</i> <i>Application Pipeline ⇔</i>	<i>Allocated Perf Payment ⇔</i> <i>Expended Budget ⇔</i> <i>Available Earned Perf Payment ⇔</i> <i>Available Budget ⇔</i> <i>Application Pipeline ⇔</i>

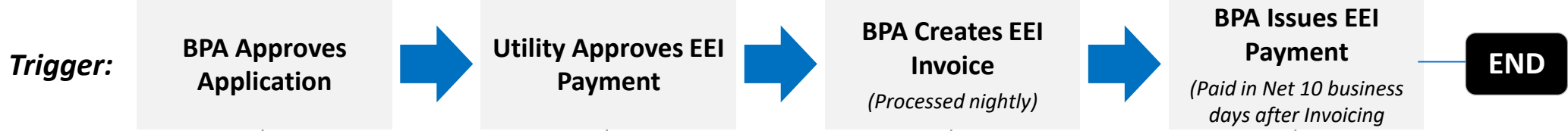
Return to Table of Contents

KEY: ↑ Budget increases ↓ Budget decreases ⇔ Budget remains the same

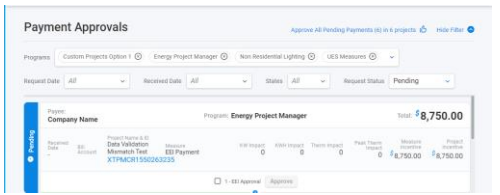


EI Payment Invoicing Process – Payment Approvals & Application Page Updates

Summary view of updates made to the Payment Approvals Page and the Application Page along the application and EEI payment approval process. NOTE: This does not apply to Performance Payment applications.



Payment Approvals Page



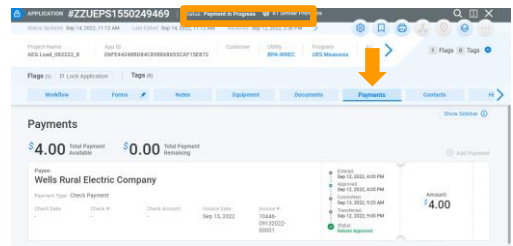
Pending Payment appears in queue for approval

Pending Payment disappears from queue when approved

N/A – No Visibility

N/A – No Visibility

Application Page (Workflow Status & Payments Tab)



Workflow Status:
Status: Ready to Invoice

Payments Tab:
+ Approved Date

Workflow Status:
Status: Ready to Invoice

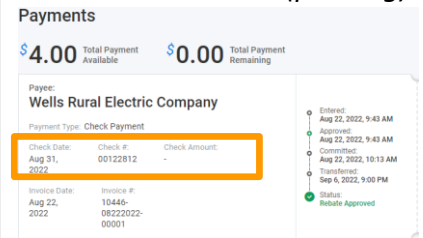
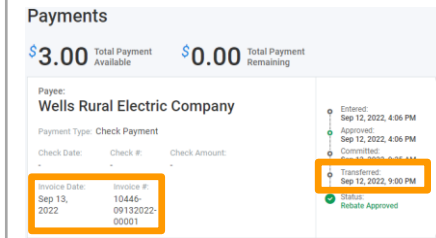
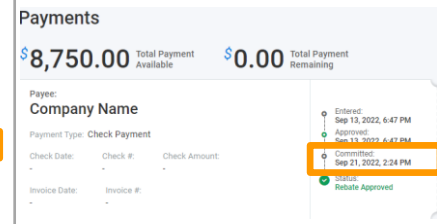
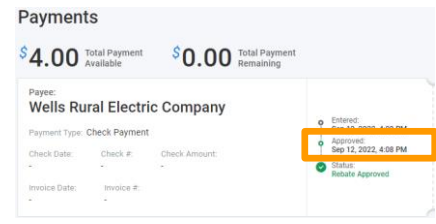
Payments Tab:
+ 'Committed' Date

Workflow Status:
Status: Payment in Progress

Payments Tab:
+ 'Transferred' Date
+ Invoice Date
+ Invoice #

Workflow Status:
Status: Application Completed

Payments Tab:
+ Check Date
+ Check #
+ Check Amount (pending)



Return to Table of Contents

END

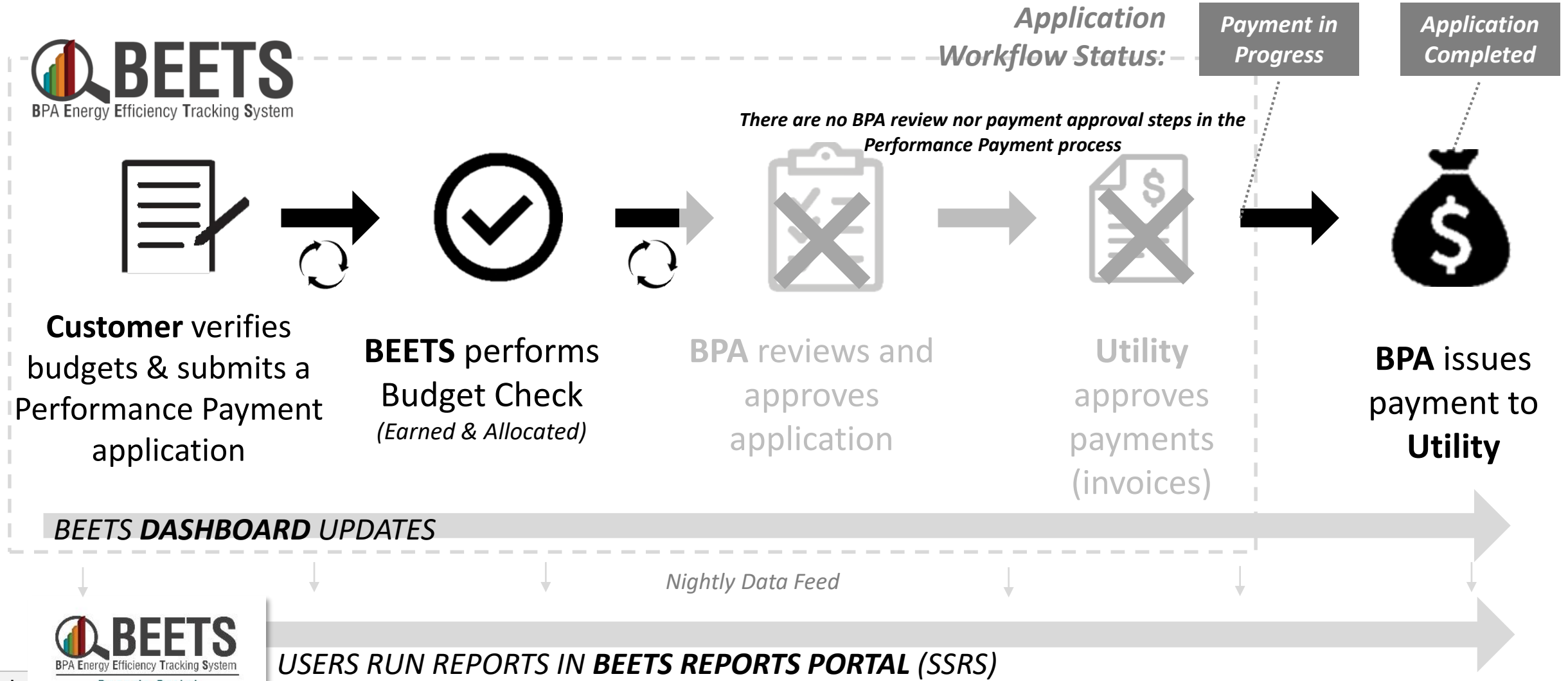
Performance Payments

How to submit and process Performance Payment applications



Performance Payment Invoicing Process

Performance Payments now require customers to complete a separate process in BEETS. Customers will need to submit a separate Performance Payment application prior to payment. See [here](#) for more information on changes to the process. Guidance on how to submit for Performance Payment follows.



Performance Payments:

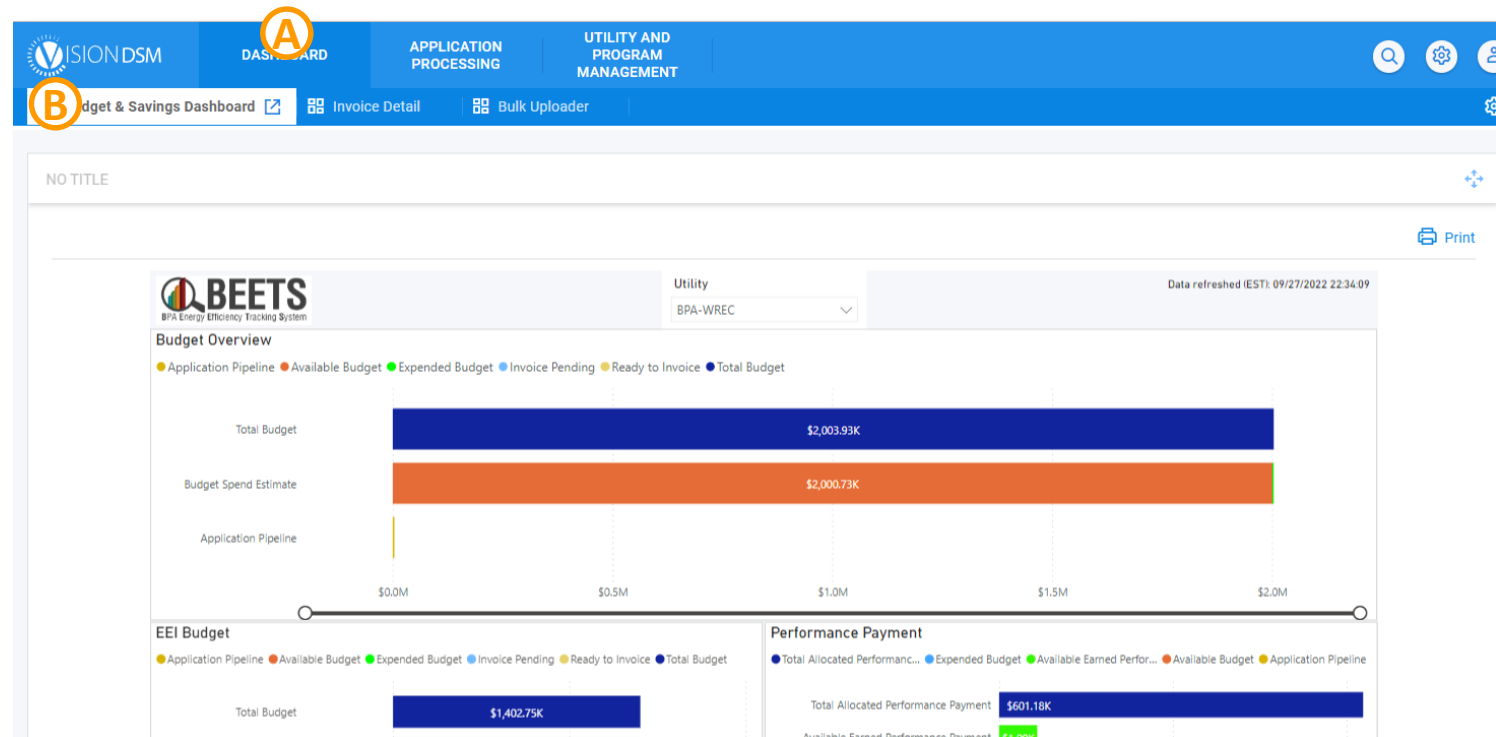
Verifying Performance Payment Budgets

Prior to completing the Performance Payment request process, you must ensure that the utility has enough 1) Total Allocated Performance Payments, and 2) Available Earned Performance Payment to cover the requested payment. If it does not, BEETS will place the application in BUDGET HOLD status until funds are sufficiently earned and allocated. Guidance on how to verify budgets follows.

Summary of Steps:

1. Log in to [BEETS](#).
2. Ensure the Dashboard tab is selected. **A**
3. Click on the Budget & Savings Dashboard. *NOTE: if you do not have this visible, follow instructions [here](#) to add this view to your Dashboard.* **B**

Continued on next page....



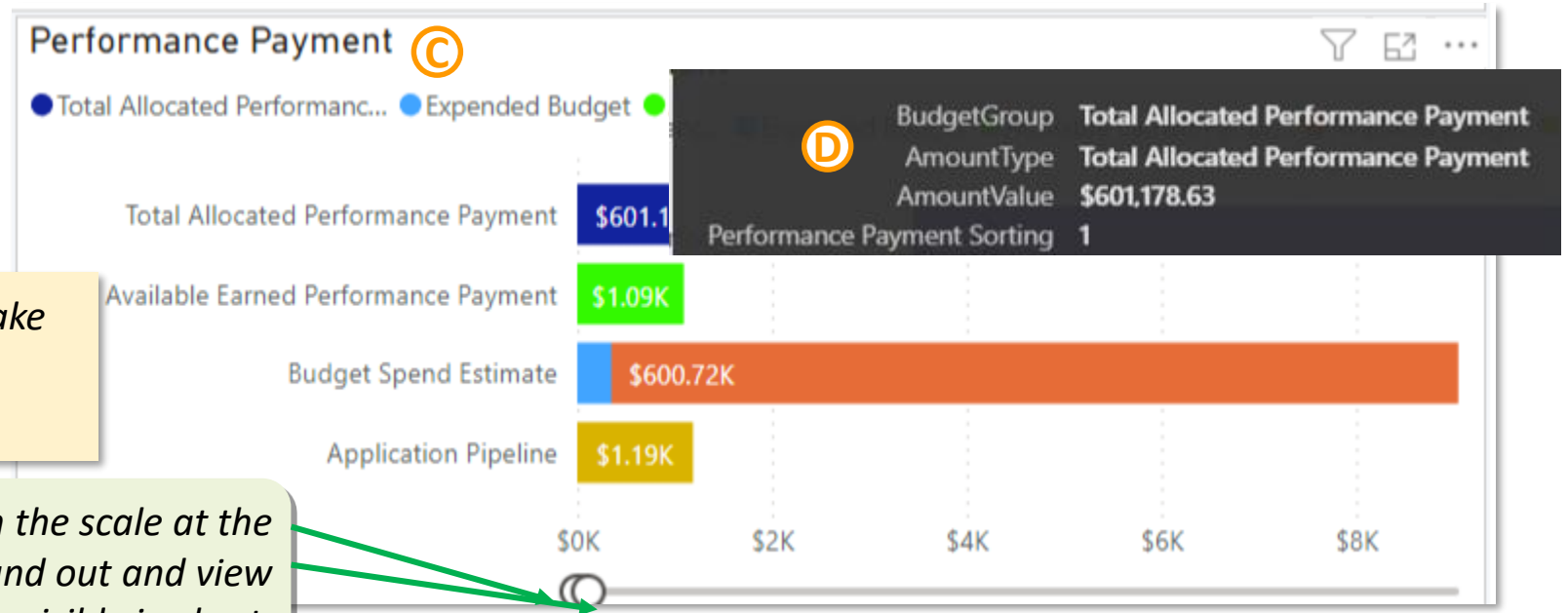
Summary of Steps, continued:

4. Scroll down and to the right to navigate to the *Performance Payment* section of the dashboard. Ⓒ
5. Hover over the *Total Allocated Performance Payment* and *Available Earned Performance Payment* bars on the chart to view budget amounts; you may need to click and drag the circles under the graph to see smaller amounts (see note below). Ⓓ
6. Verify that your budget amounts do not exceed the amount of Performance Payment you plan to request. If it exceeds either of these budget or your application will be placed in [BUDGET HOLD status](#).
7. Once verified, proceed with [submitting a Performance Payment application](#).

END

!! IMPORTANT !! Dashboard budgets may take up to 24 hours reflect updates from the application & payment approval processes.

Click and drag the two circles on the scale at the bottom of the graph to zoom in and out and view smaller numbers that may not be visible in chart.



Performance Payments:

Submitting a Performance Payment Application

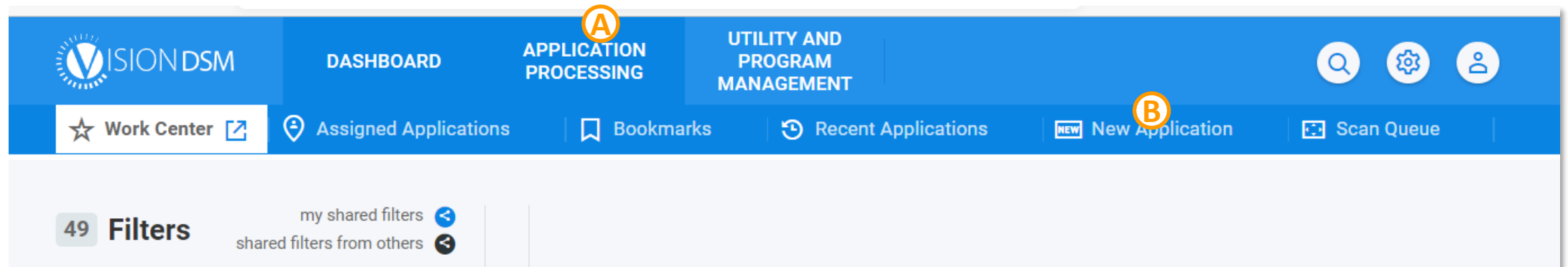
Submitting a Performance Payment Application (1 of 6)

In BEETS, Performance Payments are no longer paid automatically and must be requested through BEETS before payment can be issued. See instructions below on how to submit a Performance Payment application.

!! IMPORTANT !! *Earned Performance Payments are not applied until EEI funds are invoiced (runs nightly). We recommend customers wait until the next day to submit Performance Payment applications if relying on these recently earned Performance Payment funds.*

Summary of Steps:

1. Log in to [BEETS](#).
2. Ensure the Utility has sufficient funds in Earned and Allocated Performance Payment Budgets (instructions [here](#)).
3. From the BEETS home page, click on the *Application Processing* tab up top. **A**
4. Click on *New Application*. **B**



Continued on next page....



Summary of Steps, continued:

5. The *Create New Application* form will appear. **C**
6. Select appropriate utility from the *Utility* drop-down. **D**
7. Select '*Performance Payment*' from the *Select Program* dropdown. **E**
8. Select '*Start Here*' from the *Select Application Form* drop-down. **F** **NOTE: If you do not select 'Start Here', application may not process correctly through the Workflow.**
9. Click *Continue with creation* button. **G**

Continued on next page....

C Create New Application

Select Utility

D Bonneville Expedition

Select Program

E Performance Payment

Select Application Form



F Start Here

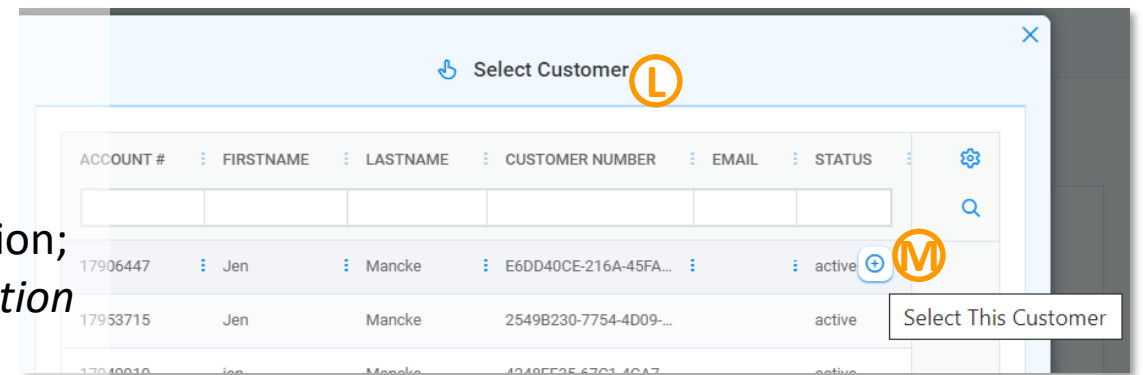
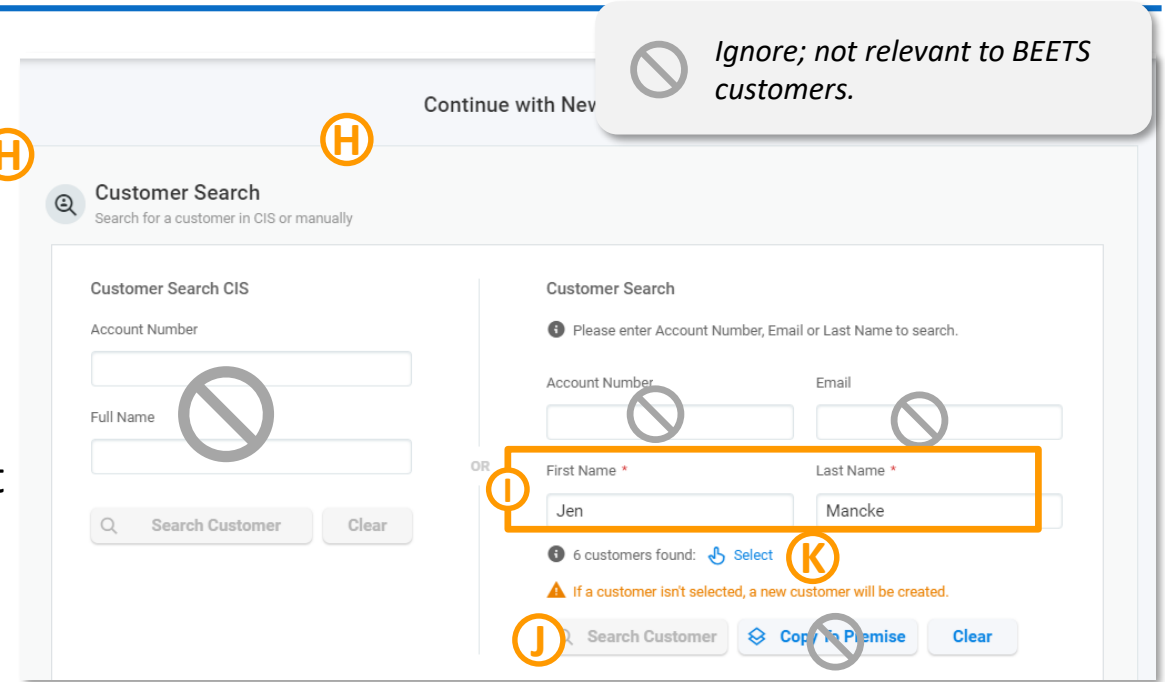
G Continue with creation Cancel



Submitting a Performance Payment Application (3 of 6)

Summary of Steps, continued:

10. The *Continue with New App creation* screen will appear. Ⓜ
11. Enter your name in the *First Name & Last Name* fields in the *Customer Search* section. Ⓜ
12. Click *Search Customer* button. Ⓜ
13. If you have previously submitted a Performance Payment application, your customer record, you will receive the open to *Select Customer*:
 - a) Click the blue *Select*. Ⓜ
 - b) The *Select Customer* screen will appear. Ⓜ
 - c) Hover over the appropriate name and a blue  icon will appear. Ⓜ
 - d) Click  icon to apply your name to the application; you will return to the *Continue with New Application* screen;



Continued on next page....

Summary of Steps, continued:

14. If you have not submitted a Performance Payment before, when you click the *Search Customer* button:

- A notice will appear that an account doesn't exist.
- No further action needed; a new record will be created the will appear the next time you input this name in the *Customer Search* fields.

15. Scroll down to the *Start Here* section of the form; feel free to ignore the *Your Contact Information* section.

16. Complete the required fields in the *Start Here* section:

- *Project Name* is a user generated identifier for that application to reference at a later time.
- Input desired amount in *the Performance Payment Requested (\$)* field.

Continued on next page....

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Ignore; not relevant for this program.

Customer Search

Please enter Account Number, Email or Last Name to search.

Account Number Email

First Name * Last Name *

Account does not exist as a current customer - one will be created when application is created

Your Contact Information

Start Here

Highlighted fields marked with are administrative and are not shown to all users.

Start Here

Performance Payment Request

Project Name *

Performance Payment Requested (\$) *

Notes



Summary of Steps, continued:

- 17. Scroll down past the *Equipment* and *Files* sections; they are irrelevant to Performance Payments applications and can be ignored.
- 18. Once you get to the bottom of the form, click the *Create New Application* button. **P**
- 19. Your Performance Payment application has been created. **IMPORTANT!! Click on *Open Application* button to view status and ensure you have no remaining tasks to complete.** **Q**

Continued on next page....

Application Created

Application CCF1A06141ED4C32B9E811A8244E075F successfully created.

Would you like to open it or create another application?

Q Open Application

P Create Another New Application

Equipment

Select Equipment **Compare Equipment** **Delete Equipment**

PRODUCT CATEGORY	NAME	REFID	DATE ENTERED	QUANTITY
No Data				

Files

Upload Files

FILE...	FILE NA...	FILE ACCE...	FILE SECU...	FILE TY...	FOLD...	REF...	T...	US...
No Data								

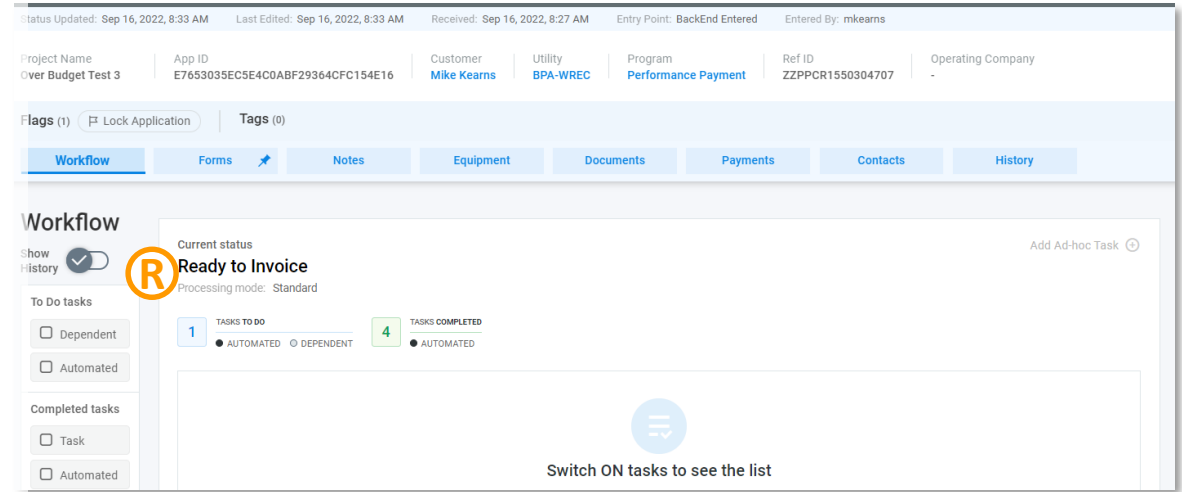
P Create New Application Cancel



Summary of Steps, continued:

20. If there are sufficient *Available Earned Performance Payment* and *Allocated Performance Payment* funds:

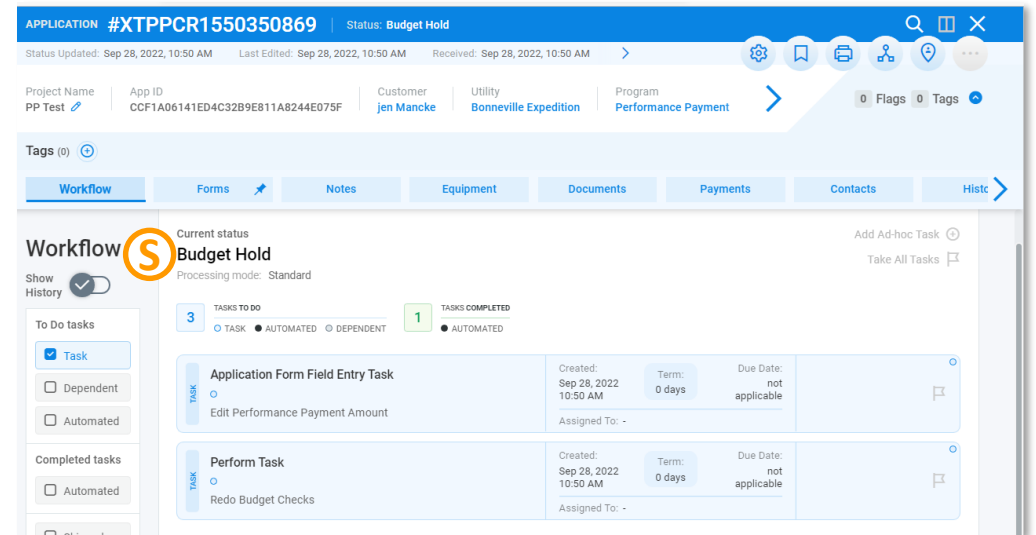
- a) The application will proceed to **READY TO INVOICE** status.
- b) No further action needed; the Performance Payment will be sent to BPA finance for invoice creation and payment. See [here](#) for visibility into payment processing status.



21. If there insufficient *Available Earned Performance Payment* or *Allocated Performance Payment* funds:

- a) You will be notified via email that the application has been placed in **BUDGET HOLD** status.
- b) Proceed to the instructions on the next page for [Fixing a Budget Hold](#) in order to move the application forward.

END




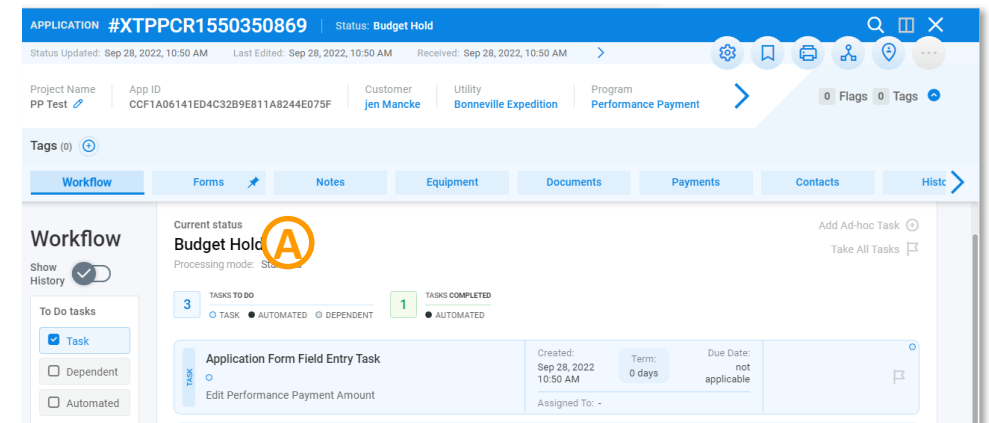
Performance Payments: Fixing a Budget Hold

Fixing a Performance Payment Budget Hold (1 of 4)

In BEETS, in order to claim Performance Payment funds, there must be sufficient 1) Allocated Performance Payment Budget and 2) Available Earned Performance Payment Budget (see [Verifying Performance Payment Budgets](#) for instructions). If there are insufficient funds in either of these budgets, the Performance Payment application will be placed in BUDGET HOLD status and must be fixed before payment can be issued. See instructions below on how to proceed.

Summary of Steps:

1. If Performance Payment application has been placed in BUDGET HOLD status, the customer will receive an email notification with the relevant Project Number (aka Application Number) with instructions on how to proceed. 
2. The utility will have three potential options to proceed:
 - a) **Reallocate EEI Budget to Available Performance Payment Budget** (option only available if the utility has sufficient EEI budget and Earned Performance Payment Budget available).
 - b) **Cancel Performance Payment application** by contacting your COTR.
 - c) **Adjust the Performance Payment application amount** to one that is within budget; proceed with the following steps.



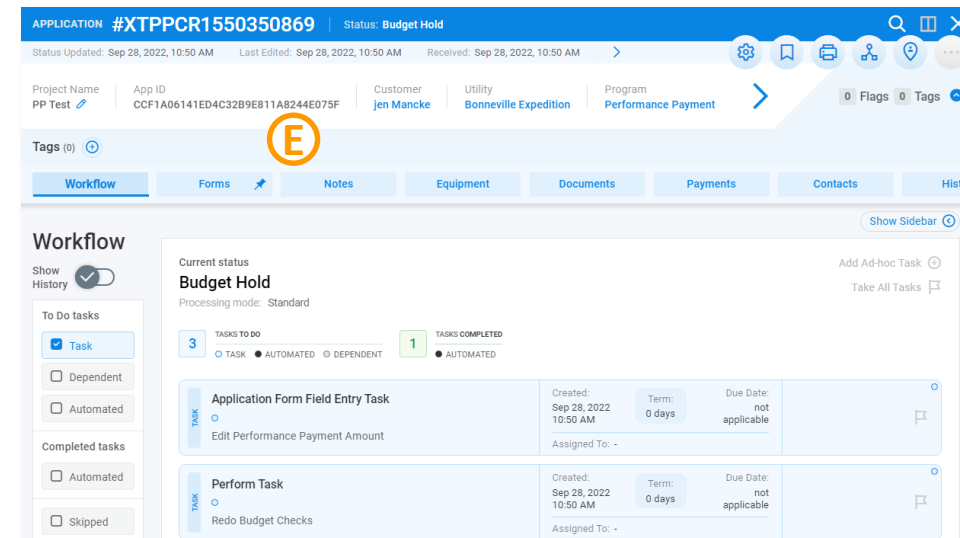
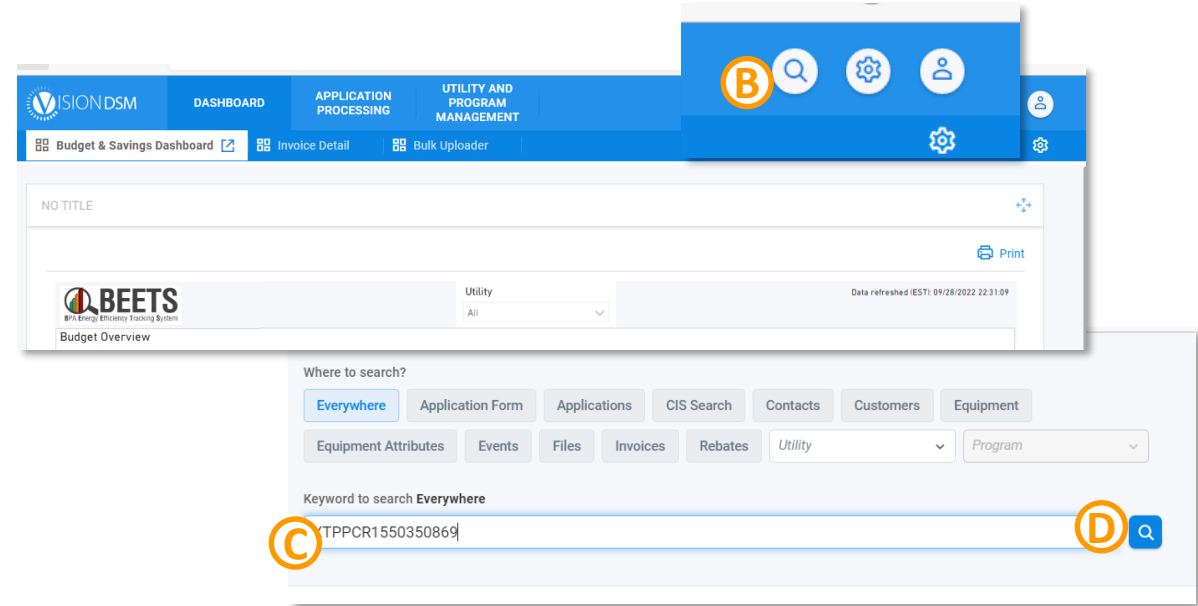
Continued on next page....



Summary of Steps, continued:

3. If utility would like to adjust the Performance Payment application to an amount that is in budget, [log in to BEETS](#).
4. Click on the *Global Search Navigation* icon from the home page. **(B)**
5. Open the relevant Performance Payment application by copying and pasting the *Project Number* (aka Application Number) from the Budget Hold email notification into the *Global Navigation Search keyword field*; if needed, reference the BEETS Navigation Guide for other options on how to find and access the application. **(C)**
6. Click the blue *Search* icon to open application. **(D)**
7. You will be taken directly to the application page. **(E)**

[Continued on next page....](#)



Summary of Steps, continued:



- From the Workflow screen, click on the *Application Form Field Entry Task – Edit Performance Payment Amount* task. **F**
- The task will expand; scroll down to ensure the *Performance Payment Requested* field is visible.
- Adjust amount in the *Performance Payment Requested* field to an amount that is within budget. **G**
- Click the *Save* button. **H**

Continued on next page....

The screenshot displays the BEETS application interface for application #XTPPCR1550350869, which is in a 'Budget Hold' status. The workflow screen shows a 'Budget Hold' current status with 3 tasks to do and 1 task completed. The 'Application Form Field Entry Task' is selected, and the 'Performance Payment Amount' field is highlighted with a red 'F'. A modal window titled 'Start Here' is open, showing the 'Performance Payment Request' form with the 'Performance Payment Requested (\$)' field set to 100, highlighted with a red 'G'. The 'Save' button is highlighted with a red 'H'.



Summary of Steps, continued:

12. Momentarily, the task will disappear from the Workflow screen.
13. Click on the remaining *Perform Task – Redo Budget Checks* task to expand the task. 
14. Check the certification box, and click the *Submit* button.
15. BEETS will perform the budget checks again:
 - If the amount is now within budget, the application will proceed to **READY TO INVOICE** status and will be automatically sent to BPA Finance for payment. 
 - If the amount is still NOT within budget, the application will return to **BUDGET HOLD** status and will need to be fixed before payment can be processed. Contact your EER if you continue to experience issues.

END

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of Contents

The image displays two screenshots from the BEETS system. The top screenshot shows a task in 'Budget Hold' status. The 'Perform Task' step is expanded, revealing a certification checkbox labeled 'I certify that this task is completed' and 'Submit' and 'Cancel' buttons. An orange box highlights this section, with an orange 'I' icon next to it. The bottom screenshot shows the workflow status changed to 'Ready to Invoice', with an orange 'J' icon next to the status label.

Performance Payment: Monitoring Performance Payment Invoicing Progress

Guidance on how the Performance Payment process status is reflected on the Budget and Savings Dashboard, Invoice Dashboard, and associated Application Page

As an application is approved by BPA and goes through the payment approval process, there are multiple areas of the system that update to reflect the progress of the payment. The following instructions provides visibility into these updates and where to find them.

APPLICATION PAGE UPDATES:

Application Page
(Workflow Status & Payments Tab)

APPLICATION #ZZUEPS1550249373 Status: **Payment in Progress** 81 Similar Premises

Status Updated: Sep 14, 2022, 11:12 AM Last Edited: Sep 14, 2022, 11:12 AM Received: Sep 12, 2022, 2:50 PM Entry Point: Imported

Project Name: AEG Load_082222_3 App ID: 8698714E975541EBA9CE5BB388692864 Customer: BPA-WREC Utility: UES Measures Program: Ref ID: 13_AIRHA40001_4/4/2

Flags (1) Lock Application Tags (1) Duplicate_Detected

Workflow Forms Notes Equipment Documents **Payments**

Payments

\$3.00 Total Payment Available \$0.00 Total Payment Remaining

Payee: Wells Rural Electric Company

Payment Type: Check Payment

Check Date: Check #: Check Amount: Invoice Date: Sep 13, 2022 Invoice #: 10446-09132022-00001

Entered: Sep 12, 2022 Approved: Sep 12, 2022 Committed: Sep 13, 2022 Transferred: Sep 12, 2022 Status: Rebate Approved

DASHBOARD UPDATES:

Budget & Savings Dashboard Invoice Detail **Budget Dashboard**

NO TITLE

Budget Overview

Total Budget \$42,793,116

Budget Spend Estimate \$42,607,006

File Export View 1 Parameters

Utility Company Required Invoice Number Required Null

Invoice Approved Date From Required To Required

View report Cancel

Invoicing Detail Report

Unlike EEI Payments, Performance Payments do NOT need to go through the Payment approvals process and are instead automatically submitted for payment upon approval.



Performance Payment Invoicing - Application Page Updates

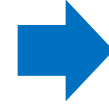
Summary view of updates made to the Payment Approvals Page and the Application Page along the Performance Payment application process.

Trigger:

BEETS Automatically Approves Performance Payment after Submittal
(i.e. Budget Check passed)



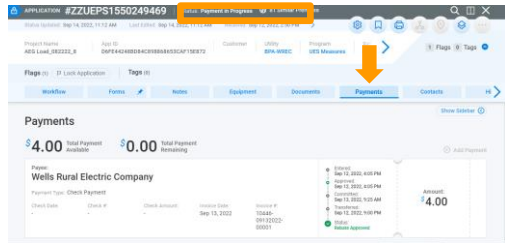
BPA Creates Performance Payment Invoice
(Processed nightly)



BPA Issues Performance Payment
(Paid in Net 10 business days after Invoicing)

END

Application Page (Workflow Status & Payments Tab)



Workflow Status:

Status: Ready to Invoice

Payments Tab:

- + Approved Date
- + 'Committed' Date

Payments
\$8,750.00 Total Payment Available | \$0.00 Total Payment Remaining

Payee: Wells Rural Electric Company
Payment Type: Check Payment

Check Date	Check #	Check Amount
-	-	-

Invoice Date: - | Invoice #: -

Timeline: Entered: Sep 13, 2022, 6:47 PM; Approved: Sep 13, 2022, 6:47 PM; Committed: Sep 21, 2022, 2:24 PM; Status: Rebate Approved

Workflow Status:

Status: Payment in Progress

Payments Tab:

- + 'Transferred' Date
- + Invoice Date
- + Invoice #

Payments
\$3.00 Total Payment Available | \$0.00 Total Payment Remaining

Payee: Wells Rural Electric Company
Payment Type: Check Payment

Check Date	Check #	Check Amount
-	-	-

Invoice Date: Sep 13, 2022 | Invoice #: 10446-09132022-00001

Timeline: Entered: Sep 12, 2022, 4:06 PM; Approved: Sep 12, 2022, 4:06 PM; Committed: Sep 13, 2022, 9:35 AM; Transferred: Sep 12, 2022, 9:00 PM; Status: Rebate Approved

Workflow Status:

Status: Application Completed

Payments Tab:

- + Check Date
- + Check #
- + Check Amount (pending)

Payments
\$4.00 Total Payment Available | \$0.00 Total Payment Remaining

Payee: Wells Rural Electric Company
Payment Type: Check Payment

Check Date	Check #	Check Amount
Aug 31, 2022	00122812	-

Invoice Date: Aug 22, 2022 | Invoice #: 10446-08222022-00001

Timeline: Entered: Aug 22, 2022, 9:43 AM; Approved: Aug 22, 2022, 9:43 AM; Committed: Aug 22, 2022, 10:13 AM; Transferred: Sep 6, 2022, 9:00 PM; Status: Rebate Approved



Performance Payment Invoicing - Dashboard Updates

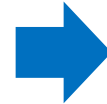
Summary view of updates made to the Budget Dashboard & Invoice Dashboard along the Performance Payment application process.

Trigger:

BEETS Automatically Approves Performance Payment after Submittal
(i.e. Budget Check Passed)



BPA Creates Performance Payment Invoice
(Processed nightly)



BPA Issues Performance Payment
(Paid in Net 10 business days after Invoicing)

END

Invoice Dashboard (Dashboard)

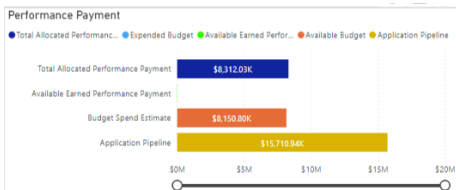


N/A – No Visibility

Invoice Status: Payment in Progress

Invoice Status: Invoice Completed

Performance Payment Budget (Budget Dashboard)*



Allocated Perf Payment ⇔
Expended Budget ⇔
Available Earned Perf Payment ⇔
Available Budget ⇔
Application Pipeline ⇔

Allocated Perf Payment ↓
Expended Budget ↑
Available Earned Perf Payment ↓
Available Budget ↓
Application Pipeline ⇔

Allocated Perf Payment ⇔
Expended Budget ⇔
Available Earned Perf Payment ⇔
Available Budget ⇔
Application Pipeline ⇔

KEY: ↑ Budget increases ↓ Budget decreases ⇔ Budget remains the same

END

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***PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS***

Budget Reallocation

How to reallocate funds between your EEI and
Performance Payment budgets



Budget Reallocation:

Submitting a Budget Reallocation Request

***PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS***

Submitting a Budget Reallocation Request (1 of 4)

In BEETS, EEI and Performance Payment funds are both managed in separate budgets and are invoiced separately. Before invoicing, you must ensure that you have enough funds in that budget, and if not, you have the option to reallocate funds between the two (up to your rate period cap). Budget Reallocation requests are submitted outside of VisionDSM in the BEETS Budget Management portal. NOTE: These are request only and will be individually reviewed and approved by a BPA Budget Analyst before completion.

Summary of Steps:

1. You will need to create a BEETS Budget Management Portal account before logging in the first time. See [here](#) for instructions.
2. Once you have set up your account, click on the [BEETS Budget Management](#) link.
3. Enter your *Email Address* and click the *Continue* button. **B**
4. Enter your *Password* and click the *Submit* button. **C**

Continued on next page....

**PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS**



Summary of Steps, continued:

5. On the next screen, click on *Begin Application* button. **D**
 6. Enter an identifiable name in the *Budget Transfer Name* field. **E**
 7. Select *Budget Reallocation* from the *Select Budget Transfer Type* drop-down. **F**
 8. Click the *Continue* button. **G**
- Continued on next page*

**PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS**

[My Account](#) [Submit Transfer Request](#)

Program Application

Thank you for your interest in this program.

To complete the application process, you will need to enter details regarding the following items:

- A valid account in our system
- Your contact information (name, email)
- Source and/or Receiving utility information and details for bilateral transfer
- Requested transfer amount for Budget reallocation
- Maximum requested amount for Unassigned Account Request

Are you ready to begin your application?

Submitting a Budget Reallocation Request (3 of 4)

Summary of Steps, continued:

9. On the next screen, select the appropriate utility from the *Requesting Utility* drop-down. H
10. Select appropriate *Transfer from* account (EEI or Performance Payment). I
11. Enter the transfer amount in the *Amount* field. J
12. Click *Complete Application*.
13. You will receive an A confirmation; your B Request will be sent to the BPA Budget Analyst for review and approval. L
14. Click on *Return to Account overview* to return to your submitted applications page. M

Continued on next page....

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bpa.gov

My Account Submit Transfer Request

Utility Budget Reallocation Request

Utility Budget Reallocation Request

Requesting Utility

H Expedition

Transfer from (EEI/Perf Pmt)

I EEI

Amount

J 100

Application - OR - Save & Complete Later

**PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS**

bpa.gov

My Account Submit Transfer Request

L

Application submitted

Project number BPBTVA1550346449

M [Return to Account overview](#)



Submitting a Budget Reallocation Request (4 of 4)

Summary of Steps, continued:

15. You will be taken to the *Submitted Applications* page.

16. To view your application, click on *Date Created* sort arrows to view most recent Budget Reallocation Requests.

17. Your submittal will be in *Pending Development* status.

18. Once reviewed by the EER, you will receive an email notification.

a) You will receive an email notification confirming your Budget Reallocation Request is complete.

b) The status on the *My Account* page will change to *Transfer Completed*.

19. If revisions are required, proceed to the [Performing a Budget Reallocation Request Revisions Required](#) instructions on the next page. **END**

The screenshot shows the 'My Applications (19)' page with filters for 'Incomplete Applications (5)' and 'Submitted Applications (14)'. A table lists applications with columns for Project Number, Project Name, Contact, Status, Date Created, Program, Messages & Tasks, and Action. One application is highlighted with a 'P' icon. An email notification is shown below, titled '[EXTERNAL] Budget Reallocation Request Completed'.

PROJECT NUMBER	PROJECT NAME	CONTACT	STATUS	DATE CREATED	PROGRAM	MESSAGES & TASKS	ACTION
BPBTVA1550346449	BUDGET TRANSFER EXAMPLE	-	Budget Reallocation	Sep 27, 2022, 4:26:00 PM	Budget Management	-	View Application
BPBTVA1550345873	EXPEDITION Budaet	-	Budaet	Sep 27, 2022.	Budget nagement	-	View Application
					udget nagement	-	View Application

[EXTERNAL] Budget Reallocation Request Completed

Retention Policy: BPA Capstone - 7 Year Policy (7 years) Expires: 9/27/2029

BPBTVA1550122151 - asdfda

Expedition: Your Budget Reallocation application in the amount of 100 has been reviewed and processed. Please review your budget and if any issues, please contact your EER.

Budget Reallocation: Performing a Budget Reallocation Revisions Required

***PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS***

Performing a Budget Reallocation Request Revisions Required (1 of 3)

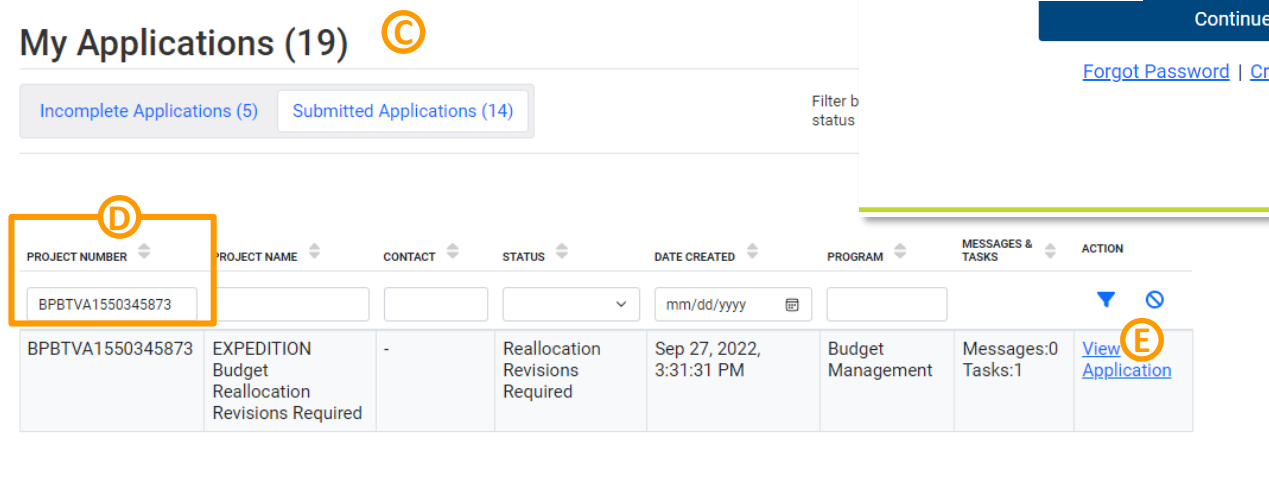
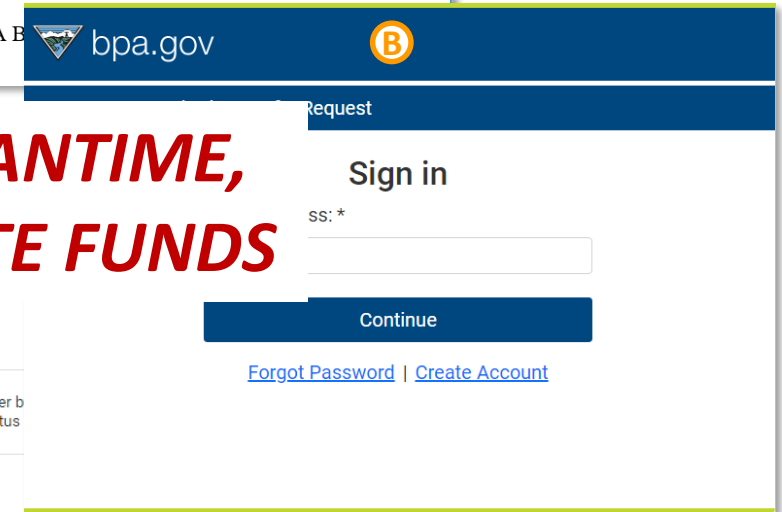
If a Budget Reallocation Request is submitted, but the requested budget has insufficient funds, you will be sent an email notification including instructions on revisions that need to be made before your request can move forward. See guidance below on how to make these revisions.

Summary of Steps:

1. If revisions on your Budget Reallocation Request are needed, you will be sent an email notification including a Project Number and details around requested changes. **A**
2. Log in to the [BEETS Budget Management Portal](#). **B**
3. You will be taken to the [Applications](#) page. **C**
4. Copy and paste *Project Number* from email notification into the *Project Number* header field. **D**
5. Press *Enter* on your keyboard to filter request.
6. Click on *View Application*. **E**



**PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS**



Summary of Steps, continued:

7. You will be taken to the *Application Page*; your *Project Status* will be *Reallocation Revisions Required*. (F)

The screenshot shows the bpa.gov website with a dark blue header. Below the header, there are navigation links for 'My Account' and 'Submit Transfer Request'. The main content area is titled 'Application' and includes a 'Print Application' button. A table of project details is displayed:

Project #	BPBTVA1550345873
Project Name	EXPEDITION Budget Reallocation Revisions Required
Program	Budget Management
Application Date	Sep 27, 2022, 3:31:31 PM
Project Status	(F) Reallocation Revisions Required

**PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS**

8. Scroll all the way down the page to the *Your Assigned Tasks* section.

9. Click on the *Application Form Entry Task – Revise Budget Reallocation* task. (H)

Continued on next page....

Equipment

No equipment added.

Your Assigned Tasks

The following items need action by you. Click each item to complete.

Application Form Entry Task (H)
Revise Budget Reallocation Request



Summary of Steps, continued:

- 10. The *Utility Budget Reallocation Request* form will open. ⓘ
- 11. Adjust *Amount* as requested in the revisions required email. ⓘ
- 12. Click *Save* button. Ⓚ
- 13. Your application *Status* will change back to *Budget Reallocation* for the BPA Budget Analyst to approve. Ⓛ

***PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS***

- 15. Once reviewed by the BPA Budget Analyst, if approved:
 - a) You will receive an email notification confirming your transfer is complete.
 - b) Your transfer status on the *My Account* page will change to *Transfer Completed*.

END

Budget Reallocation:

Creating a Budget Management Portal Account

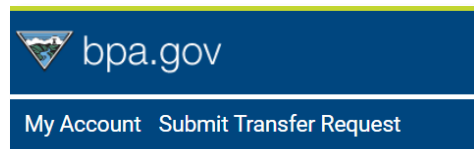
***PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS***

Creating a Budget Management Portal Account (1 of 2)

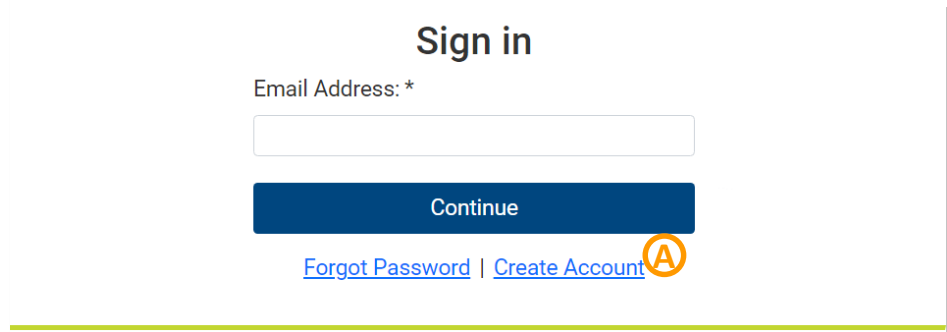
In BEETS, EEI and Performance Payment funds are both managed in separate budgets and are invoiced separately. Before invoicing, you must ensure that you have enough funds in that budget, and if not, you have the option to reallocate funds between the two (up to your rate period cap). Budget Reallocation requests are submitted outside of VisionDSM in the BEETS Budget Management portal. NOTE: These are request only and will be individually reviewed and approved by a BPA Budget Analyst.

Summary of Steps:

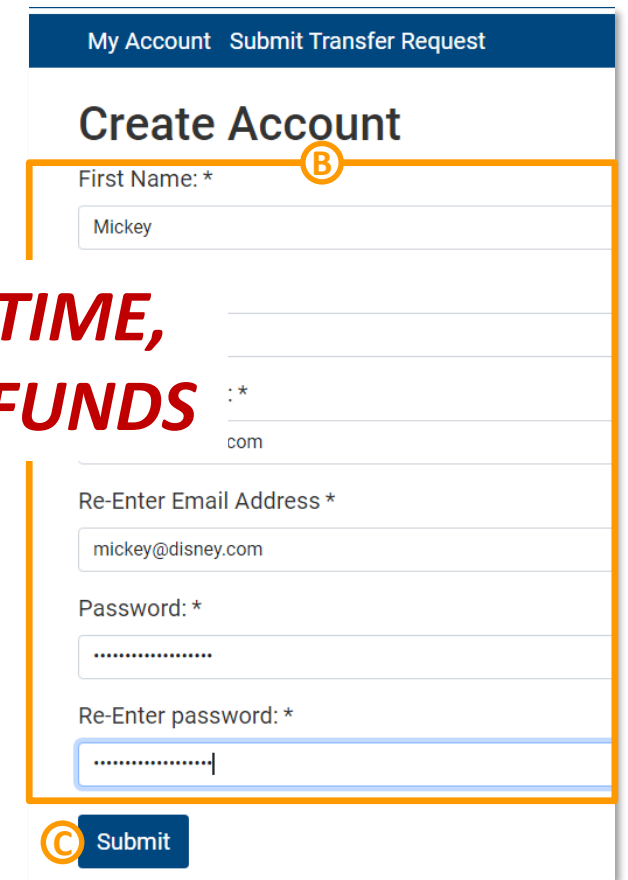
1. Go to the [BEETS Budget Management Portal](#) page.
2. Click on *Create Account*. A
3. The *Create Account* form will appear; complete the required fields (as noted by B).



**PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS**



Continued on next page....

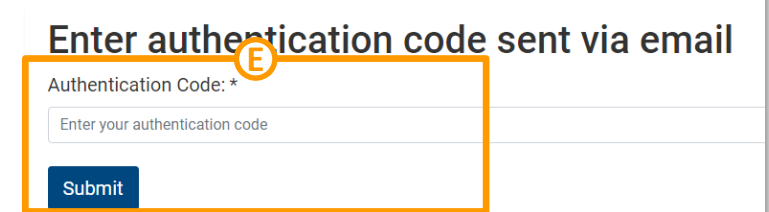
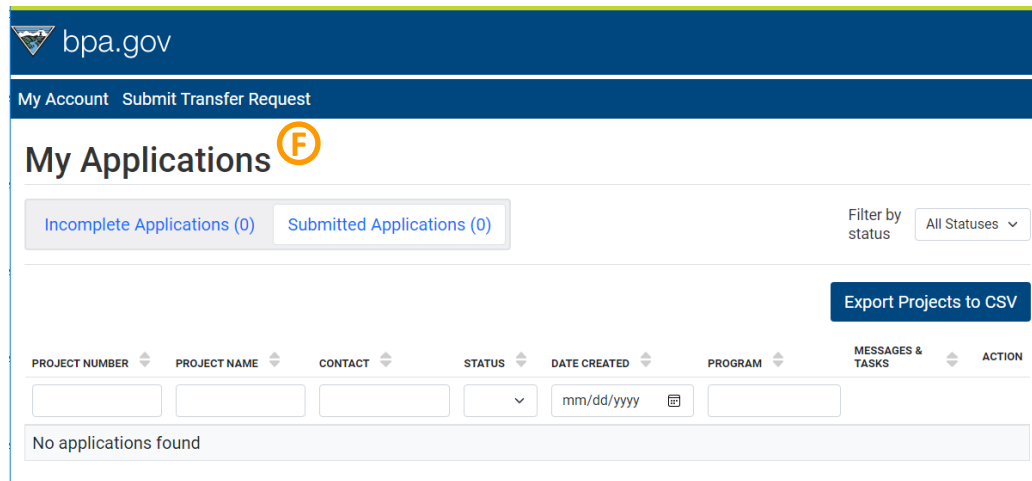
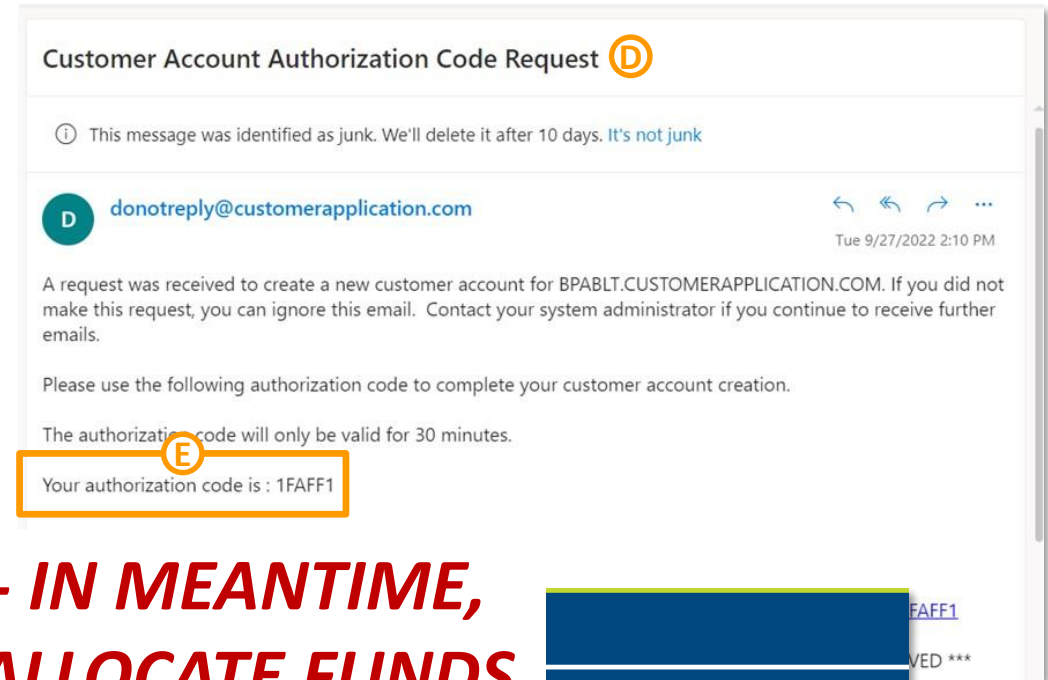


Summary of Steps, continued:

5. You will be requested to enter an *Authentication Code*.
6. Check your email to find the *Customer Account Authorization Code Request* email (be sure to check your junk folder if you do not receive it in a few minutes). ^(D)
7. Copy and paste the authorization code from the email into the Authentication Code field and click the Submit Button. ^(E)
8. You will be taken to t
9. If ready, follow instr

**PENDING DEVELOPMENT - IN MEANTIME,
CONTACT YOUR EER TO REALLOCATE FUNDS**

[Request.](#)



Invoicing Dashboard Set-up

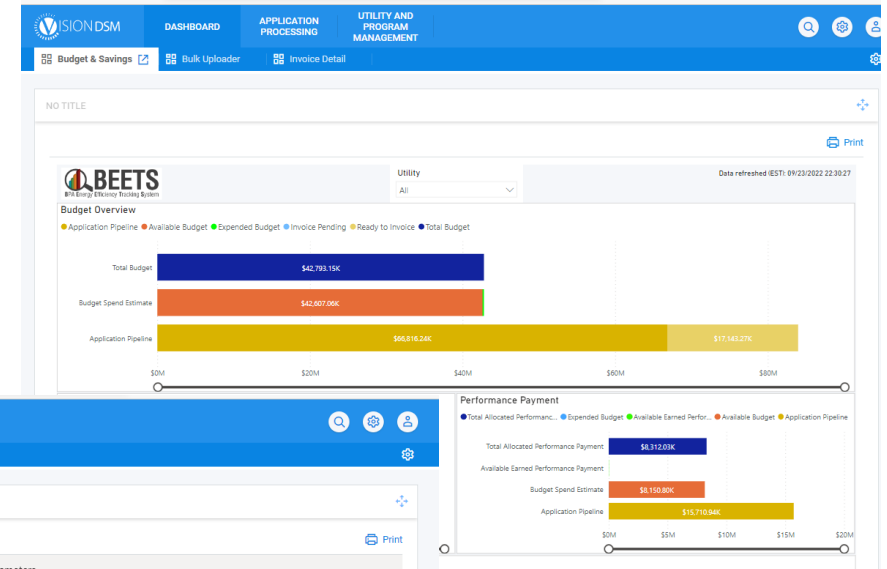
Setting up key dashboards needed for invoicing



There are many dashboard widgets, or components designed to facilitate access to the most used functions, that are available to users within the BEETS system. The following Dashboard Widgets are needed to perform the invoicing process.

Key Invoicing Dashboard Widgets:

Budget & Savings Dashboard (i.e. PowerBI Report): Summary of Utility EEI and Performance Payment budgets and savings data; referenced to ensure utility has enough funds prior to invoicing. *One-time set-up instructions [here](#).*



Invoice Dashboard (i.e. Paginated Report): Provides visibility into the invoice status and line item detail of applications included in a particular invoice. *One-time set-up instructions [here](#).*

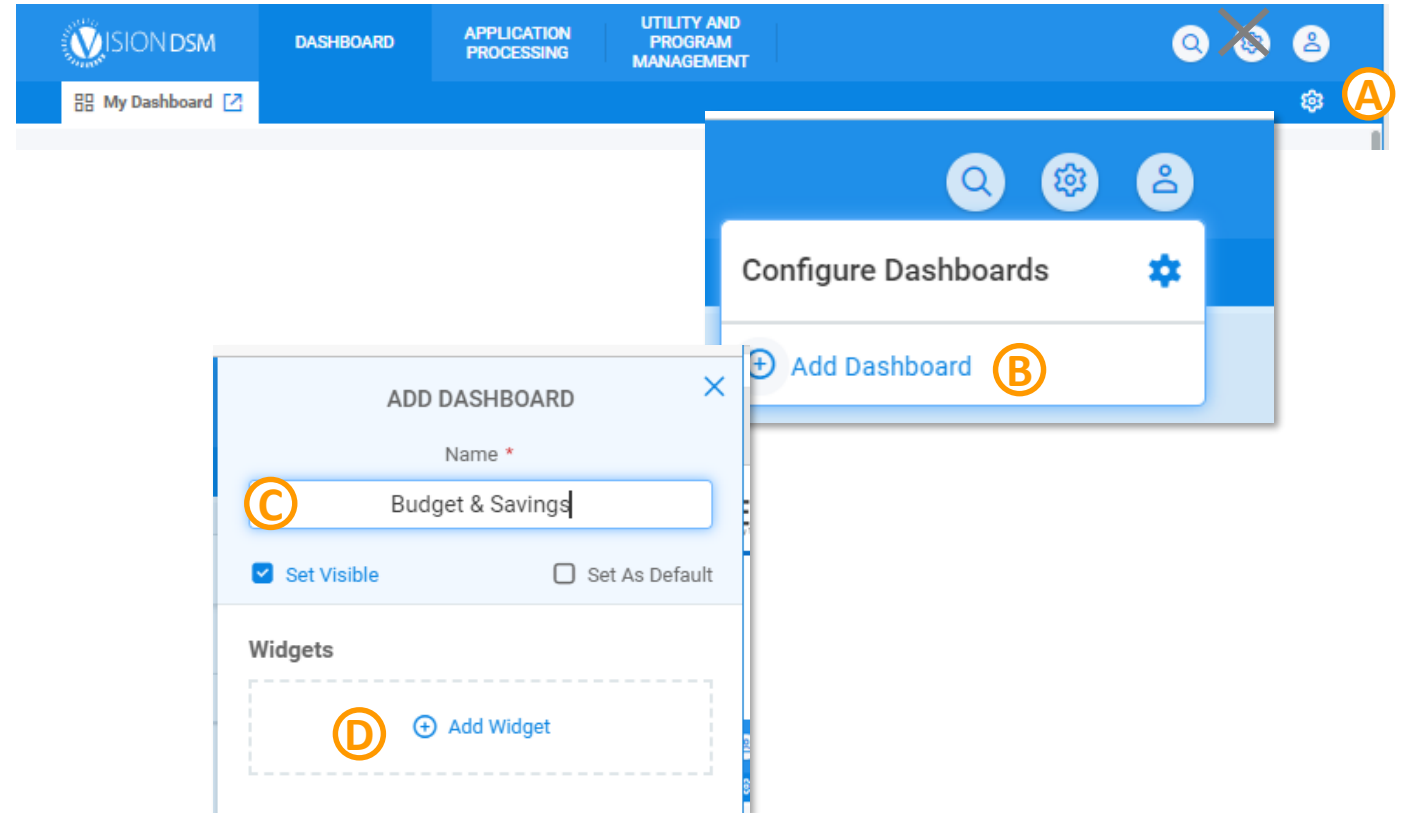
Utility	BEETS Invoice	Invoice Description	Invoice Status	Invoice Total	Invoice Date
BPA-Snohomish	10354-07192022-00001	BPA-Snohomish-07192022-EEI	Payment in Progress	\$517.83	07/19/2022
BPA-Snohomish	10354-08012022-00001	BPA-Snohomish-08012022-EEI	Invoice Completed	\$19,226.51	08/01/2022
BPA-Snohomish	10354-08252022-00001	BPA-Snohomish-08252022-EEI	Invoice Completed	\$64,462.11	08/25/2022
BPA-Snohomish	10354-09062022-00001	BPA-Snohomish-09062022-EEI	Invoice Completed	\$150.00	09/06/2022
BPA-Snohomish	10354-09072022-00001	BPA-Snohomish-09072022-PERF	Invoice Cancelled		09/07/2022
BPA-Snohomish	10354-09092022-00001	BPA-Snohomish-09092022-EEI	Invoice Completed	\$3,472.00	09/09/2022

Setting up Invoicing Dashboard Widgets (1 of 3)

Guidance for setting up dashboards that are key reference points in the Invoicing Process.

Summary of Steps:

1. From the Dashboard tab on the BEETS landing page, click on the white *Gear* icon in the upper right-hand corner. **(A)**
2. Click on *Add Dashboard*. **(B)**
3. Type in *Name* field to create unique dashboard name (i.e. 'Budget & Savings Dashboard' or 'Invoice Dashboard'). **(C)**
4. Click on *Add Widget*. **(D)**



Summary of Steps, continued:

5. Select PowerBI Report from *Type* and BPA Dashboard from *Report*. NOTE: you do not need to enter data in *Title*, *Entity Type*, or *Entity Number*. (E)
6. Click the *Save* button. (F)
7. The *Budget & Savings Dashboard* will appear on your home screen. (G)

Continued on the next page....

ADD DASHBOARD

Name *

Budget & Saving

Set Visible Set As Default

Widgets

Type *

PowerBI Report

Title

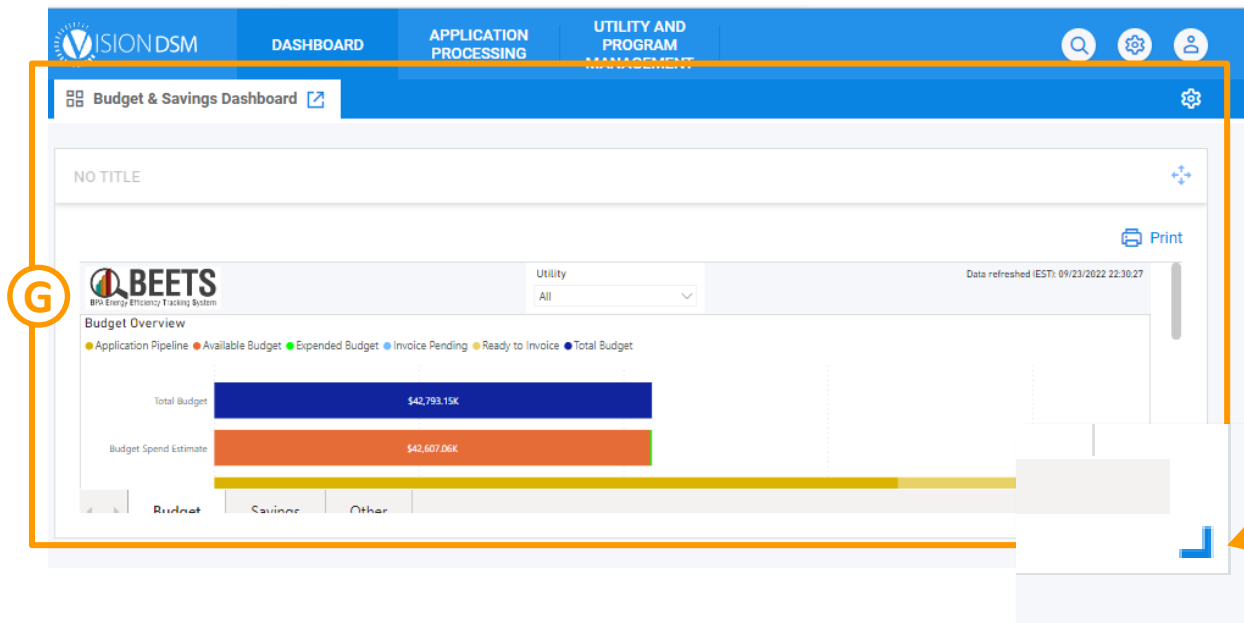
Report *


BPA Dashboard

Entity Type

Select Entity Type

Entity Number



‘Click and Drag’ on the  symbol to resize and optimize the dashboard view.



Summary of Steps, continued:

- Repeat steps 1 – 4.
- Select Paginated Report from *Type* and BPA Invoice Dashboard from *Report*. NOTE: you do NOT need to enter data in *Title*, *Entity Type*, or *Entity Number*.
- Click the *Save* button.
- The ***Invoice Dashboard*** will appear on your home screen (shown below). **END**

BEETS Key Links and Support Resources

Key links and information on finding help using BEETS



[BEETS Landing Page](#) – *Main BEETS informational site on BPA.gov including announcements, information, and links to training and support resources.*

[BEETS Site](#) – *Submit EEI reporting and invoices*

[BEETS Reports Portal](#) – *Run reports on EEI reporting and invoice data; recommend using Google Chrome browser*

[BEETS Training Materials and Support Resources](#) – *Find answers to common questions and access training resources*

Additional questions? Email BEETS@bpa.gov or contact your EER.

Appendices

Additional Resources

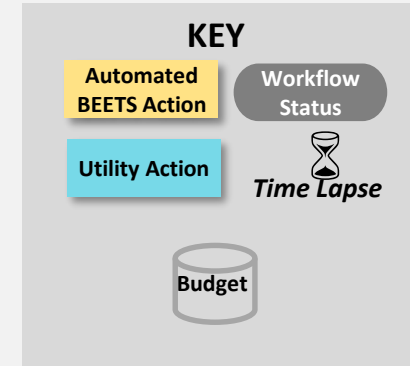
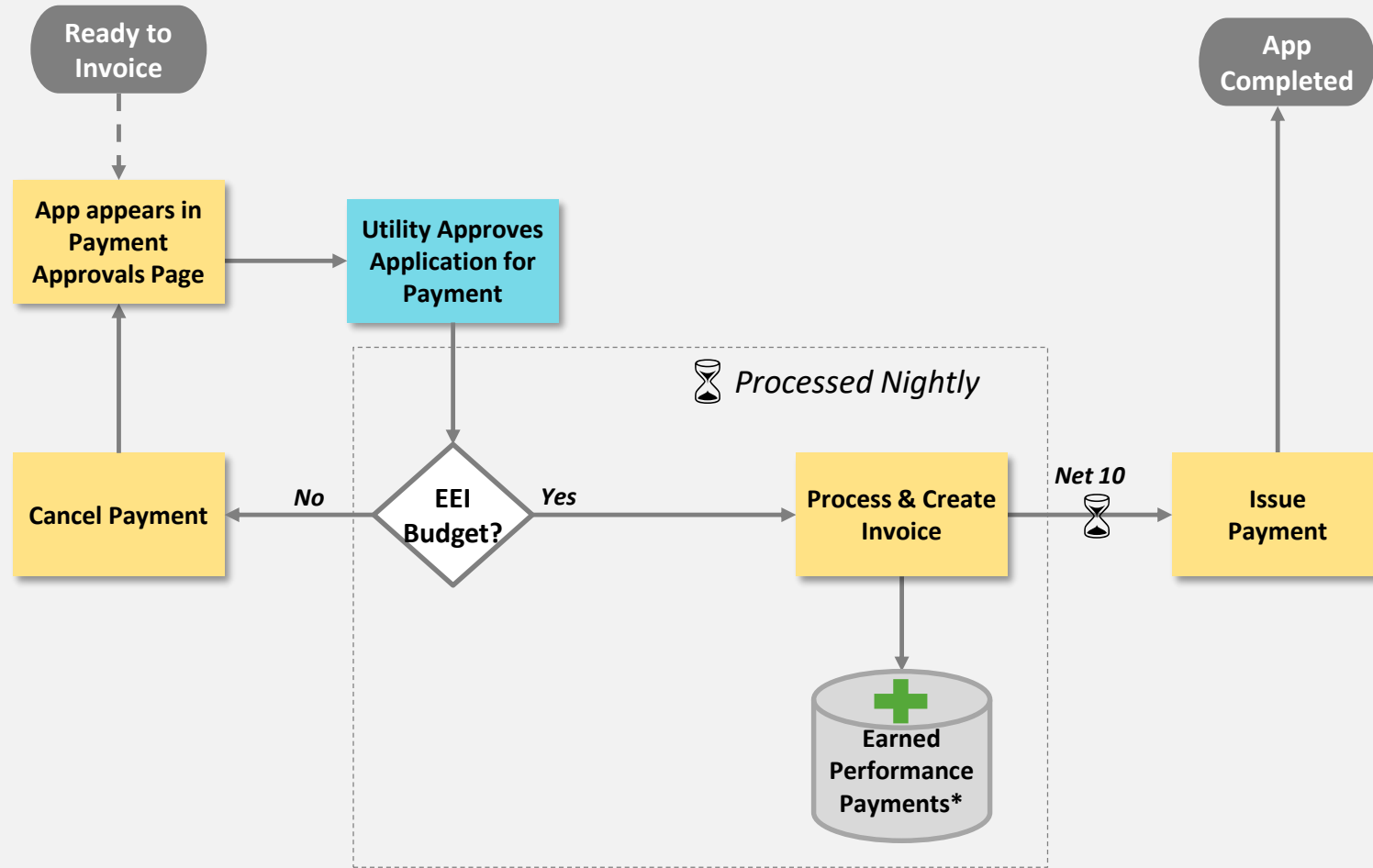
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See below for a reference of common terminology in BEETS. NOTE: Due to some constraints around the off-the-shelf, some terminology could not be adjusted for BPA, so some may be different than in the past.

Term	Definition
Application	Reported measure or project
Equipment	Equipment = Measure; used interchangeably in BEETS
Form	Component of BEETS that stores application data
Invoice	Request for reimbursement (and/or documentation of self-funding); this is now a separate step from the application approval process in BEETS
Program	Types of reported measures/projects that share common reporting requirements, calculations, and business rules (i.e. group of UES related measures now encompass the UES program)
Premise Address	Address of site where measure is installed or facility where project is located
Widget	Dashboard components designed to facilitate easy access to common functions and reports
Workflow	Sequence of tasks included in the application process from submittal to invoicing where data is passed between users and/or systems

EEl Payment Approvals (Invoicing) Process Flow

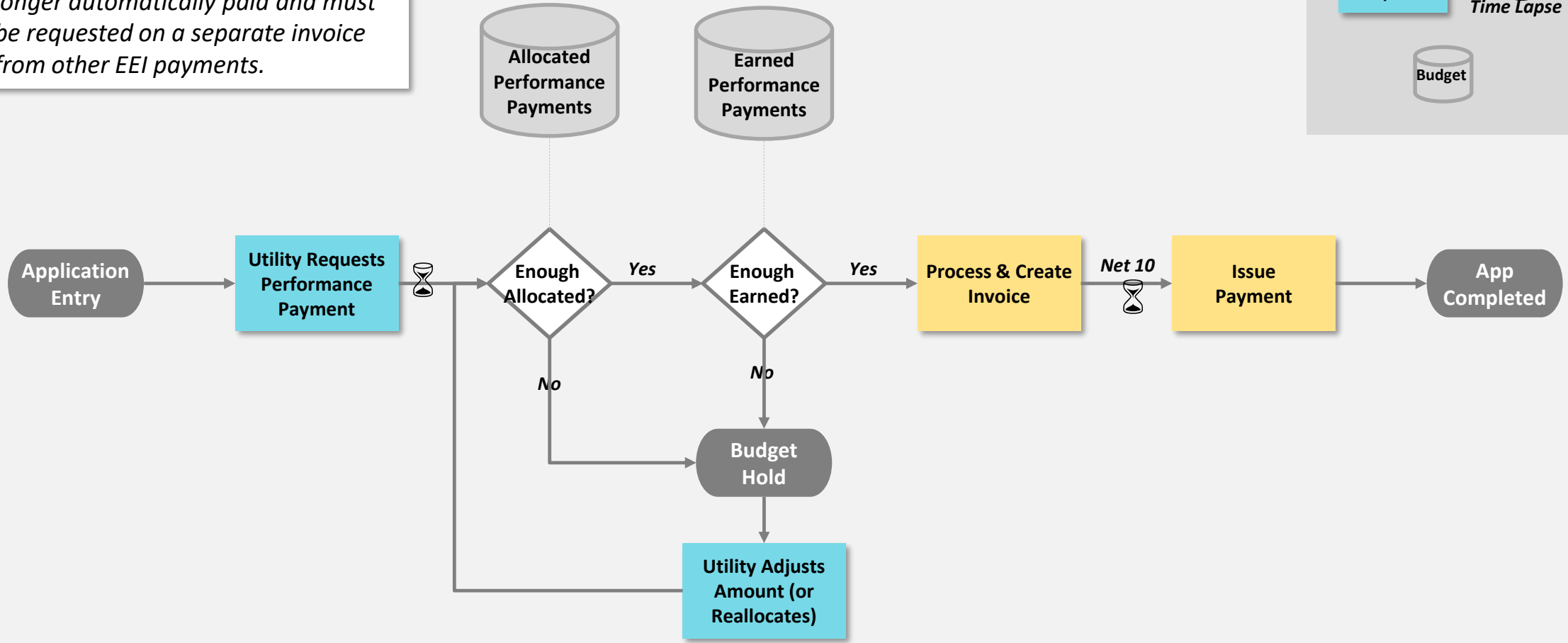


*NOTE: Performance payments are no longer automatically paid and must be requested on a separate invoice from other EEl payments.

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Performance Payments Invoicing Process Flow

NOTE: Performance payments are no longer automatically paid and must be requested on a separate invoice from other EEI payments.



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Date	Version	Change	Change made by:
10/3/22	1.0	Original Publishing Date	Jen Mancke
11/22/22	2.0	Published Changes: <ul style="list-style-type: none"> • Added some additional clarity on the Invoicing and Performance Payment processes • Noted Budget Allocation Process as 'Pending Development' • Updated Invoicing and Performance Payment Process Flows 	Jen Mancke