BONNEVILLE POWER ADMINISTRATION



BPA Online Lighting Calculator User Manual



Table of Contents

Purpose	1
Scope	2
Glossary of Terms	2
How To	2
Log into Hancock Cloud	2
Create Administrator Account	3
MINT	4
Installing MINT: Mac and App	5
Installing MINT: Microsoft Windows	5
Current Installations	5
Starting a Project	5
MINT	5
Adding Measures	10
Trade Ally in Hancock Cloud	15
Utility Work	
Utility Incentive Costs Adjustments	
New Construction in MINT	19
Administrative Account Functions	
Miscellaneous Tips	

Purpose

The document is a master training manual for the Bonneville Power Administration (BPA) Online Lighting Calculator (OLC). It has detailed instructions for utilities to submit a lighting calculator (LC) to BPA.

Scope

This document provides essential information and training for all user types in the OLC. User roles define the content each individual can view and interact with. Here is an overview of each role, including a brief description and their corresponding access permissions.

- Hancock Software personnel: full access, with the ability to make code changes.
- BPA Administrators: set incentive rates, add BPA users, add utilities and trade allies, and create their administrators.
- BPA Users: add projects, edit, and regular use.
- Trade Ally Users: add projects, edit, and regular use.
- Utility Administrators: add utility users, set utility incentives, and regular use.
- Utility User: edit and approve projects, and regular use.

Glossary of Terms

The new OLC has been built on an existing cloud-based platform. As a result, some of the names used in the past with LCs are different in the new OLC.

Previous Lighting Calculator	Online Lighting Calculator	
Trovious Lighting Odiodiator	Hancock Cloud	MINT
Incentive	Project cost	
Invoiced (e.g. sent to BEETS)	Status of Submitted to Utility or Submitted to BEETS	
Measures		Items
Project	Application	
Project Name	Customer Name	
Report		Proposals
Spaces (e.g. walk-in cooler)		Areas
Utility	Energy Consumption	

Hancock Cloud vs. MINT

The Online Lighting Calculator consists of two parts: Hancock Cloud, and MINT.

- Hancock Cloud is Hancock Software's home platform (website). This is where you start projects, manage them, and submit them to a utility or ultimately to BPA Energy Efficiency Tracking System (BEETS).
- MINT is an application that can be downloaded to a tablet or laptop for use in the field when Internet connections may or may not be available. MINT is the engine that runs energy saving calculations. The typical use-case is that projects are created in Hancock Cloud, then synched to MINT for data entry and calculations, and then synced back to Hancock Cloud to be finished.

How To

- Log into Hancock Cloud
 - Hancock provides an online Hancock Cloud, which is used to start every project. This is a website accessed with your internet browser. Hancock Cloud Bonneville Power Administration https://bpa.hancocksoftware.com/HEEC/#/login
- Create Administrator Account

BPA creates all utility and trade ally administrator accounts, and utility and trade ally provides the name and email address for the person who will serve as an administrator. The utility and trade ally administrators can create subsequent user accounts for their own organization. If your organization needs a new admin account, please email your request to <u>lighting@bpa.gov</u>.

- Utility or trade ally sends a request to <u>lighting@bpa.gov</u> setting up an administrator account.
- Utility or trade ally administrator adds new users for your organization.
- See administrative account functions for further instructions.
- Enter your username and password sent by BPA into the login screen.
- Hancock Cloud website: Bonneville Power Administration Production

HANCOCK" SOFTWARE		 Support 	🏟 Single Sign-On
	Hancock Cloud - Bonneville Power Administration - Production		
	Login Name		
	Login Name		
	Password		
	Password		
	Sign In		
	Change password Forgot password?		
	Copyright ©2025 Hancock Software Inc.		

What is MINT

MINT is an application available on Microsoft Windows and Apple iPadOS and MacOS, providing utilities and trade allies the ability to input lighting calculator details while offline supporting in the field usage. You will use MINT after you enter the project into Hancock Cloud based OLC.

Installing MINT: Apple iPad and Macintosh computers

You can download MINT on your tablet, but it is not compatible with an iPhone.

- Go to the app store and download Hancock MINT Mobile Intake Tool.
- The Apple app store will have the most recent version of the MINT app available. Ensure automatic

10:16 Search Hancock **MINT** MINT Û Get 3.1 4+ ***** Years Old Business Hancock So P Not Charging PM Mon Nov 28 2 PM Mon Nov 28 Welcome to MINT 1 Project Fill Your account is provided by Hancock Energy Efficiency Cloud Lily Demo NEW CONTRACTOR Size Assessment Date: 11/25/22 2 12:00 PM 0 Items: 30 Areas: 0 Measures: 0 Proposals: 0 Notes: 28 Open To Dos Password Service URL https://mint.hancocksoftware.com/ Finalize Account Setup Internet Connection Required Finalizing account setup... Processing step 10 of 10 Done hed load Activ ep 8 of 10 tos... hotos finished step 9 of 10 os finished step 10 of 10 5: ٩ E

updates are selected or be prepared to check for updates every time you use the app. If your settings do not allow automatic updates, choose to allow them manually when available.

Installing MINT: Microsoft Windows

- Go to the Hancock Software download page, link below, and select the Version appropriate for your system. <u>https://bpa.hancocksoftware.com/mint/</u>.
- Run the installation .exe, an install wizard will assist you with the process



Hancock Software Bonneville Power Administration MINT Production Support

MINT Installation Page: updated 3-9-2025 5PM ET - build 1510 Production Build

Windows 11 64-bit standard install kit

Windows 11 64-bit MSI for Managed Desktops

Apple MacBook installation package

Hancock MINT (Apple TestFlight)

AppStore iPad/iPhone Public build 1472

For organizations that do not allow individuals to install their own software, work with your organization's IT department to get the right version (usually the MSI one) installed.

Starting a Project

Once logged into Hancock Cloud, you'll see the ADMIN screen below or similar depending on User type.

• Click the Application button on the left side of the screen to get started.

	ADM	lin					1 v	Villiam_Crabtre	e_BPA_Admin		😧 Suş	pport 🛃	Sign Out
Admin	Org	anization Intak	e Template User L	ogin Details	Failed Login De	tails MINT Da	ta Mapping BO M	anagement	Bulletin Board	Audit Log	More *		
Application	G	Process ALL 142	Records	er Name						Add	Delete	Clear Search	Export
Allocation	0	Short Name	Organization Name	Inactive	Org Code	Business Type	Business Function	FED Tax ID	State Tax ID	Email	Can Cr	reate Organizati	ions
Container		٩	Q	(AJI) -	٩	Q,	Q.	Q	۹	Q	(All)		- C
Burlant	0 >	Richland	Richland		10089	Utiliity							- î
Project		USN Bangor	USN Bangor		10409	Utility							
Invoice	0 >	Okanogan Coop	Okanogan Coop		10285	Utility							
Configuration	0 >	KTU	кти		13927	Utiliity							
Evenet Data	0 >	Albion	Albion		10055	Utility							
Export Data	0 >	Ellensburg	Ellensburg		10072	Utility							
Vendor	0 >	Monmouth	Monmouth		10083	Utility		ð	5				
Project Approval	0 >	Northern Lights	Northern Lights		10278	Utiliity							
	0 >	Whatcom	Whatcom		10451	Utility							
		MEC	UEC		10388	Utiliity							
	0.0	Mason 1	Mason 1		10246	Utiliity							
	0 3	Bonners Ferry	Bonners Ferry		10062	Utility							_
	0.	DOE-RL	DOE-RL		10426	Utiliity							_
	0 >	Missoula	Missoula		10259	Utiliity							
	0 >	Minidoka	Minidoka		10082	Utility							
	0 >	Big Bend	Big Bend		10027	Utility							
	0 >	Lillamook	Tillamook		10376	Utility							
	0.0	Idaho Falls Power	Idaho Falls Power	.0.	10204	Utility							
	10	50 100						Page 1	of 8 (142 items)	< 1 2	3 4	5 6 7	8 >

	APPLICATION					William_Cra	btree_BPA_Admin	MINT	Support	🖌 Sign Out
Admin	Weatherization								-	
Application	🔓 More + 🗌 Pre	ocess All 232 Records			Create Project	All	* Filters	Clear Search	Save Profile	New Application
Allocation	Client Number	Client Status 👻 🛛	Customer Name	Customer Name 2	Total Monthly Income	Applied Date	Project Street Address	Project City	Project Zip Code	Phone
Container	Q	Q. (All) + (Q	Q	Q	۹ 🖬	Q	Q	Q	Q
Project	274282671	Job Created	/24 BPA End to End	MM		1/24/2025	7878	Portland	54321	(\$03) 000-0000
Invoice	1769185231	Job Created	Girk - BPA Test			1/24/2025	wrgwrg	Acequia	55555	(444) 444-4444
Configuration	1574582443	Job Created	indsey Ellis	Test 1/23		1/23/2025	123 Nowhere ave.	Portland	97202	(555) 555-5555
comparation	181631773	Job Created	IPA	1/23 End to End		1/23/2025	1234	Portland	98000	(222) 222-2222
Export Data	1423302311	Job Created 1	Matt McLatchie	BPA Child Test 1/22		1/22/2025	2525 NE	Portland	98000	(503) 230-0000
Vendor	1257874970	Job Created	Grk Assembly 2			1/13/2025	11111 Street	Avalon	77777	(777) 7777-7777
Project Approval	1239722518	Job Created	Grk Test BPA Client			1/17/2025	3333 Walnut	Bandon	66666	(444) 444-4444
	1201864029	Job Created	/16	Child End to End		1/16/2025	117	Portland	12345	8888-888 (888)
	1385852417	Job Created 1	/16	End to End		1/16/2025	12345	Portland	12345	(111) 222-3333
	832164965	Job Created	William Crabtree	e2e test		1/15/2025	27 Elm st.	Cannon Beach	97123	(222) 333-4444
	690650532	Job Created 1	2/14	End to End		1/14/2025	1377	Portland	98000	(111) 222-3333
	2115611683	Job Created	Matt	12/14 Test		1/14/2025	111	Portland	12345	(111) 222-3333
	209904980	Eligible f	Matt 12/14	Test		1/14/2025	1234	Portland	99999	(111) 222-3333
	1901347367	Job Created 1	/14	Matt Test		1/14/2025	1111	Portland	12345	(111) 222-3333
	901063111	Job Created	New Construction	1/13 Test		1/13/2025	1234 E Main	Portland	90000	(111) 222-3333
	1534454047	Job Created	I/13 Test	Nonstandard measu	ires	1/13/2025	2200 99th Ave	Portland	98000	8888-888 (888) 4
	10 20 50 100						Page 1 of 12 (23	2 items)	2 3 4	5 12 >

• Click the New Application button on the far right top of the screen.

• Complete the application **Contact** information. Please note that "Customer Name" is the Project Name (and will be transferred to MINT), Customer name 2 is any additional info related to the project, and Customer Contact name is the actual name of a person at the site. (Note: the asterisk (*) identifies required fields).

lew Application				New Ap	plication Client	Letter More +	- 0
New Application 🗙							
Application Info							
			C	ancel Save	Verify Address	Save Settings	Unit Info
Contact							^
Customer Name*	Customer Name 2		Customer Contact Name		Email		
Project Street Address*	Project City*]	Project State*		Project Zip Code*		
	Select	•	Select	•			
Phone*	Alternate Phone		Service Address Status		Federal Building		
Mailing Same As Project Address		3					
Mailing Street Address*	Mailing City*		Mailing State*		Mailing Zip Code*		
	Select	•	Select	•			
Application							~
Energy Consumption							~
Comments							~

- Click the Energy Consumption bar
- In the Energy Consumption (Utility) section, click New and select Utility Name.
- Energy Consumption = Utility in this section

• Click Save when complete.

BC test 2/4 [02/04/2025] ×						
Application Info Application Qualificati	on design					
			Cancel Save	Verify Address	Save Settings	Unit Info
(111) 222-3333		Unverified				
Mailing Same As Project Address						
Mailing Street Address*	Mailing City*	Mailing State*		Mailing Zip Code*		
101 Main	Select	← Select	*	98888		
Energy Consumption					Remove	New
Utility	/		Comment			
D D BPA - Electricity	d'					
Comments						~
Change History						~

- Switch tabs by clicking the Application Qualification tab.
- Click the **Qualify** button, enter and pick the correct **Allocation (Rate Period)** by checking the box next to the allocations available and then close the window. Doing so connects the Allocation (Rate Period) to the project.

pplication - BC te	est 2/4		New Application	Client Letter	More 🕶	- 0
BC test 2/4 [02/04	4/2025] ×	/				1
Application Info	Application Qualification				~	
						Qualify
Client Allocations					ß	1
Pequested A	llocations					
	Allocation					Wap Rank
☑ × ☑	<u>RP FY24 FY25</u>					
Messages						
Allocation Name		Messages	Date/Time			
		Client is Eligible	2/4/2025 1-42-01 PM			

Create Project

- Check the box next to the application you want to make into a project, then click Create Project.
- Click OK on Information popup.

G		More 👻 🗌 Proc	ess All 169 Records		-	Create	Project		* Filters	Clear Search	Save Profile	New Application
		Client Number	Client Status	Customer Name	Customer Name 2	Total Monthly Income	Applied Date	Project Street Address	Project City	Project Zip Code	Phone	Alternate
		Q	Q (All) 👻	Q	Q	Q	۹ 🖬	Q	Q	Q	Q	Q
0	m	1034443391	Job Created	BPA Child	E2E		12/16/2024	1	Portland	12345	(111) 111-111	1
d	C	2138930097	Application received	BPA Child	E2E		12/16/2024	1	Portland	12345	(111) 111-111	1
		1321006213	Information missing	Bill Crabtree	Bill Crabtree		12/16/2024	143 Main St.	Canby	97123	(503) 111-22	22

• After creating the project move to the **Project** tab on the left hand side of the screen, double click on the **Project Number** to open the project detail screen.

= HANCOCK SOFTWARE	PROJEC	CT 🖉						1 w	lliam_Crabtree_	BPA_Admin	MINT	0 Su	ipport 者	Sign Out
Admin		Nore • Proces	s All 1 Records			Invoice	Validate	Delete	Save Profile	All	٣	Filters	Clear Search	Export
Application	0	Client Name	Project Number	Јов Туре	Allocati	on(s)			Agency	Addres	s	c	ounty	
Allocation		٩	all: 0000000203	Q	Q				Q	Q,		C	2	
Container	00	BC test 2/4	000000203		RP_FY24	_FY25			BPA	101 Mai	n, Aberdeen, WA	98888		
Project 🔶			1			2	5							
Invoice														
Configuration														
Export Data					_									

- In the Project Detail screen
 - o Select the Funding Source (usually EEI)
 - o Select the Sector (e.g. commercial or industrial)
 - o Click on the Schedule bar, then New to add a scheduled activity
 - o In the Task dropdown select Assessment
 - Add the person who will do the assessment (usually from the same Trade Ally/Utility): this is required to get the project to sync to MINT.
 - o Input Scheduled Date
 - Click Save (Note: must complete all fields in order to Sync to MINT)

Project Detail

lient Name:	BC test 2/4		Address:	101 Main, Aberdeen, WA 98888		County:		
lotal Cost:	\$ 0.00		Completed Date:		Ö	Allocations:	RP_FY24_FY25	i -
roject Name:	000000203		Unique Site ID:	203		Sector:	Select	
unding Source:	Select	*						
Notes: Add Note(s) here	1							
Notes: Add Note(s) here chedule	1	Ţ	ţ				1	New Save
Notes: Add Note(s) here	Task	Person	Scheduled Date			Duration Hou	irs Status	New Save Last Date

This completes all the required inputs for the project initiation in the Hancock Cloud and will allow the project to sync to the MINT application.

Copying and Fixing a Project

• When projects are not approved by BPA in BEETS, the project needs to be reworked in the Hancock Cloud and/or MINT.

If a copy is wanted (for reference purposes) proceed as follows, begin as above, starting with **New Application**.

• Once the new application is made double, click on the Project Number.

= HANCOCK	PROJE	ст		2				1 Wi	lliam_Crabtree_	BPA_Admin 🛛 MINT	
Admin	G 1	Nore * Process All 209 Records	- K			Invoice	Validate	Delete	Save Profile	All	Fi
Application	0	Client Name	Project Number	Job Type	Allocation(s)		A	gency	Addres	s	Cou
Allocation		Q	٩	Q	٩		0		Q		Q
Carthing	00	BC Copy 2/12/25 BC Copy 2nd	000000222		RP_FY24_FY25		BI	PA	101 Mai	n St., Aberdeen, WA 98888	
Concainer	0 0	BC Copy 2/12 BC Copy	000000221		RP_FY24_FY25		BI	PA	101 Ma	n St., Aberdeen, WA 98888	
Project	0 0	2/12 Grocery Store Upload Test	000000220		RP_FY24_FY25		BI	PA	1111. Po	rtland, OR 12345	
Invoice	0 0	2/12 Invoice Test	000000219		RP_FY24_FY25		BI	PA	1234', F	ortland, OR 12345	
Configuration	0 0	BC 2/1 NC Test New Construction in MINT	000000218		RP_FY24_FY25		BI	PA	101 Ma	n St., Aberdeen, WA 98888	
	0 0	Lindsey School K-12 Test	000000217		RP_FY24_FY25		BI	PA	777 He	aven Ave., Portland, OR 97222	2

• Click on the More drop-down menu, then click Copy Project.

Project Detai					~		ð×
Project Info	Client Info Building Info Validate Invoice				Project History: Current *	More * All Reports * San	e Cancel
Clent Name	BC Copy 2/12/25 BC Copy 2nd	Address	101 Main St, Aberdeen, WA 98888	County:		Copy Project	
Total Cost:	\$ 0.00	Completed Date:	c	Allocations	187_9Y24_9Y25 ()	Upload Project	
Project Name:	0000000222	Unique Site ID:	222	Sector	Select		
Funding Source	Select.						
Notes:							

• From the **Copy Project** screen, search for the application to copy the project into (recommend to sort by name); then click the checkbox and then click **Copy To**.

Сору	Project								,
G	i						Cle	ar Searcl	•
8	First Name	Last Name	Client Status	Street	Apartment	State	City	Zip	c
	G bc copy 3 2/12	Q	9	Q,	٩	Q	9	Q	¢
	BC copy 3 2/12	copy atempt 3 BC	Eligible	101 Main S	t.	WA	Aberdeen	98888	
						•			
-						_		100.00	

Cancel

• Click OK.

Project Info	Sient Info Building Info Validate Invoice			
Client Name	BC Copy 2/12/25 BC Copy 2nd	Address	101 Main St., Aberdeen, WA 96888	County
Total Cost	\$ 0.00	Completed Date		Allocations:
Designet Manage	0000000222	Unique Site IDt	222	Sectors
radeccastate.				
Funding Source	Select	•		
Funding Source Notes: Add Note(s) have	Select	•		
Funding Source Notes: Add Note(s) here ichedule	Select	•	Information	

MINT

Open MINT on your tablet or laptop, sign in with username and password, and press Finalize Account Setup the first time you use those credentials. You will also need to finalize Setup if you sign in with a different combination of username and password (e.g., an admin account vs. user account.)

• Note: this could be the same person who started the application in Hancock Cloud or a different person assigned the assessment. Only people who are scheduled to do an assessment will can see the project after it's "synced."

	Welcome to MINT	
	Your account is provided by QA build 1485 (12-4-2024)	
Username	William_Crabtree_BPA_Admin	
Password	****	
Service UR	https://bpa-acceptance.hancocksoftware.com	

- The MINT app will show that it's connecting, then show all the projects assigned to you.
 - Ensure you are connected to the internet.
 - To get the project from the Hancock Cloud to MINT, click the Sync button on the MINT main page
- > After sync, locate the project and click ViewProject.



Click on **Building Info** to begin entering the project information.

Signed in as William_Crabtree_BPA_Admin All Files Project Overview: Site Assessment IN PROGRESS Site Assessment IN PROGRESS BC test 2/4 Address- Aberdeen, 98988 Project 0000000203 Tree_FY24_FY25* Image: Client Info Building Info Date Date Date Date Date Done Done This Project has no proposals Image: Date Done Done This Summary (0) Default: default On for 12 hours per day Documents (0) To Do List Do List Documents (0) <lidocuments (0)<="" li=""> Documents (0)<</lidocuments>	Hancock MINT	-	- 🗆 ×
Project Overview: Site Assessment IN PROGRESS BC test 2/4 Address- Aberdeen, 98888 Project 000000203 Image: Client Info Building Info Assessment Dore This Project has no proposatis Image: Client Info Image: Client Info Building Info Assessment Date This Project has no proposatis Image: Client Info Image: Client Info Building Info Assessment Date This Project has no proposatis Image: Client Info Image: Client Info Aberdeen, 98888 This Project has no proposatis Image: Client Info Image: Client Info Aberdeen, 98888 This Project has no proposatis Image: Client Info Image:	Signed in as William_Crabtree_BPA_Admin		All Files
BC test 2/4 Addresss Aberdeen, 98888 Project: 0000000203 Image: Client Info Building Info Assessment Date Image: Client Info Building Info Date Image: Client Info Building Info Date Image: Client Info Building Info Date Image: Client Info Im	•	roject Overview: Site Assessment	
BC test 2/4Address Merdeen, 98888 Project: 0000000203 \mathbb{F}_{2}		IN PROGRESS	
Client Info Building Info Date RP_FY24_FY25" Image: Client Info Building Info Date Image: Client Info Date Image: Client Info Building Info Date Image: Client In	SC test 2/4 <address> Aberdeen, 98888 Project: 0000000203</address>	Assessment	Mark Project as Done
Items (0/0) Image: Construction of the second s	"RP_FY24_FY25"	Client Info Building Info Date	
Operating Schedules (1) Default: default On for 12 hours per day Documents (0) To Do List	Items (0/0)	This Project has no proposals.	
Operating Schedules (1) Default: default On for 12 hours per day Documents (0) To Do List		Notes Summary (0)	
To Do List	Operating Schedules (1) Default: default On for 12 hours per day	Documents (0)	
	To Do List		
Project Results Missing Items Completed	Project Results Missing Items		

Enter **General** information and answer the 4 questions that will determine if the job is considered a retrofit or new construction.

Ec	General		
	MINT Message	Sunday is empty!	
	Mode	Deemed	▼
	OM Savings (%)	3	
	Baseline Elegibility		
	Is the facility or exterior lighting system newly constructed?	Νο	▼
	Is the facility anewly constructed addition to an existi facility?	^{ing} No	▼
	Is there a change in the occupancy type as part of the lighting project?	e No	▼
	Is the project a major renovation for reasons other th lighting?	nan No	•
	Based on your responses the project is defined as:	Retrofit	▼
Enter • E • E • S	Project Information including: Building type (from the drop-down list) Estimated project cost Space Conditioning (Heating, Ventilation	, Air Conditioning (HVAC) information).	
Proj	ject Information	•	
Build	ing Type	Hospital	
Estim	ated Project Cost	500	
Spa	ce Conditioning		
Heati	ng Type	Gas/Oil or Biomass	

Air cond./ Heat pump

Cooling Type

> Enter **Operating Schedule** (baseline for the entire site):

• Note: if you check the "Full Year" box the total will be 8760 hours and the days will disappear.

Operating Schedule	-
Full Year	
Sunday	0
Monday	12
Tuesday	12
Wednesday	12
Thursday	12
Friday	12
Saturday	10
Weeks per Year	52
Annual Hours	3640

Click the **Return Arrow** in the upper left corner to return to the main project screen.

	Building Info BC test 2/4			
tes				
Jtility Bills	Saved Notes	Save Last Note	Ne	ew Note
Electricity Vendor: BPA				
Account Number:			Û	

Adding Measures

- Now that the overarching building characteristics are identified, move to adding specific items (Measures) to each area.
 - Click into the Items bar, add Measures which are called Items in MINT.



> You will see the Area slider is not green or ready to go

- Move the Area slider and it will turn green
- Click on the Plus sign circle

t	Bill Crab	Items tree Bill Crabtree			
0 Items	Area Existing Item	Recommended Item	0 / 0 (100.00% complete)		
	- H	~	Items Bill Crabtree Bill Crabtre		
		0 Items Area	Existing Item Reco	ommended Item	0 / 0 (100.00% complete)
			No areas have been added to thi	a file yet.	

- Now you can begin entering Area, existing (assuming retrofit) and replace equipment
 - Enter the Area Name where it says Area. For this example, we will use "office".
 - After entering "office", click the **Plus** sign across from **Lighting Existing**. This will allow the user to begin entering the existing equipment to be retrofitted.

Office	9 X 1		
earch Existing Items and Measures		Q X	Dow
ghting Existing			
ghting Existing isting Catalog Item - (Lighting)		+	

The new screen shows the Name of the Item and Measure (change if needed to track area/installations. For example, the assessor might have other items in the office and to clarify which one they could add "exit sign," "overhead," or "wallpacks," as needed to clarify.)

• Enter the general information including Name, Type (of lamp), and quantity.

Item info for Lighting Existing in office		
This is a generic item and MUST be changed. It also must ha	ave a unique name.	
Notes		
	Saved Notes Save L	ast Note New Note
Q General		T
Existing Item: Lighting Existing in office		
General		
Name	Lighting Existing in office	
MINT Message	Class is empty!	
Туре	Deemed	¥
Quantity	1	

- After updating the Quantity in the previous step, start entering the Measure Details (for the example below, we'll do a fluorescent to LED retrofit).
 - Note: the ballast factor is brought up automatically after the top sections are completed.

so must have a unique name.	
Saved Notes Save Last Note	New Note
	V
•	
T10	▼
6 ft	▼
VHO Lamp/ Mag Ballast	▼
0160	•
	Saved Notes Save Last Note T10 6 ft VHO Lamp/ Mag Ballast 0160

- > Enter the **Controls** detail (if applicable)
 - For this example, we'll use an occupancy sensor that saves 10 percent. If the Area has different HVAC or Hours, check the appropriate box and enter the appropriate information.

Controls	
Control	✓
Control Class	Occ. Sensor
Quantity of controls	1
Percent Reduction in Hours	10

Item info for Lighting Existing in Office						
Notes						
_	Saved Notes Save Last Note New Note					
General						
HVAC						
Different HVAC?						
Different Hours?						
HVAC						
Different HVAC?	\checkmark					
Heating Type	No heating					
Cooling Type	No cooling					
Different Hours?						
Sunday	24					
Monday	24					

After all the existing equipment is entered, click the **Recommend** button (bottom left corner) to open up the **Replacement/Retrofit** info window.



- Best practice for tracking existing and replacement items: It is highly recommended that the Name be updated. In this case, an update to add "in office" (so Lighting Replacement in Office) would be appropriate. This helps other people who look at the project connect existing and replacement equipment.
- If this is a decommissioning project, check the Decommission box and enter the appropriate information including FEWER lamps than before to complete the **Measure Details** section.

Recommended Measure: Lighting Replacement	
General	
Name	Lighting Replacement in office
MINT Message	Class is empty!
Туре	Deemed V
Quantity	1
Decommission	
Measure Details	
Class	LED
Category	Gen. Indoor / Outdoor
Subcategory	Standard 🛛 🔻
Lamp Wattage (Deemed)	0020
Lamps per Fixture (Deemed)	0001
Ballast Factor	1

- Note: if the project is adding controls, check that box for the existing equipment regardless of whether they're present or not at that time. This will automatically show the controls information in the recommended section.
- For example, the same controls type and percent reduction have been entered. When the existing and retrofit equipment has been entered, MINT will show the Measure Level Results.

• When complete, click **Done** button, at lower right corner.

Measure Level Results	+			
HVAC Interaction Factor		1		
Reduction in Watts (%)		89		
Total Incentives (\$)		110		
Adjusted Annual Savings (kWh)		1534		
Controls		10		
Recommend			-	Done

- Repeat adding Measures as needed for all retrofits and better than code installations for New Construction.
 - As noted before, to move to the previous screen use the white arrow in the upper left hand corner of the page.
 - If the Lighting Replacement (in office for our example) is wrong and needs to be redone, click the 3 dots and then Remove to redo the entry.

Hancock MINT		-		\times
∽ ←	Area and Item BC test 2/4			
Office	9 X 1			
Lighting Replacement in office Image: Complexity of the second		-		
Installed			MOR	E

Hancock MINT		- 0	×	
•	Area and Item BC test 2/4			
Office	×			
Lighting Replacement in office Replaces "Lighting Existing in Office" Installed		-	More	
			,	
Search Existing Items and Measures		Q X	Down	
Lighting Existing in Office Existing Project Item - (Lighting) Generic item, must be changed		+		
Lighting Replacement in office		This Area		
Recommended Project Item - (Lighting) Generic item, must be changed		This Area		
Lighting Existing in Office				
Change Operating Schedule				
Item Info				
Remove			S	
Photos			,	
> Lighting Replacement in office	_			
T Remove				
• To see the results, click the P	roposals button.			
Bill Crabtree Bill Crabtree				
<city>, <zip> Project: Canby</zip></city>		N		
"DP 1-1-24 to 12-31-24"				Client Info Building I
	1			

Proposals (1)

Items (1/1)

Assessment Date > Reports: there are 3 reports available.

The first two reports are identical to the reports from the prior lighting calculator and each is shown in a screenshot below. The third report is a way to check the kilowatt-hour (kWh) and incentive if needed.

• Important: These reports can be accessed in the Hancock Cloud, open each report and click the "Save and Submit" button in the lower left corner of the page.

A	[marked]							
t from the list	Client Report							
_	Summary Report Calculation Overla							
<i>.</i>	Concentration of the second							
			Lighting Project Pro	posal				
						Project Na	mar BC tart 2/A	
						riojectito	ine. De test 2/4	
			Project Detail S	Summary	*			
						lassativa	Tetal	
		Measure	Measure Description	Quantity***	Units	per Unit	Incentive	
		Lighting Replacement in office	Gen. Indoor / Outdoor	1	fixture(s)	110	110	
						Total	111	3
		B. To	A. Itemized Incentive Total: tal Estimated Project Costs:	\$	111 500			
	6.10	tal Estimated Project Costs:	5500					
		C. 70% of Estima	ted Project Costs Incentive		1.4.4			
		C. 70% of Estima	ted Project Costs Incentive Cap:	N	I/A			
		C. 70% of Estima D. Maximum \$0	ted Project Costs Incentive Cap: 0.50 per kWh (Project Level)	N	I/A I/A			
		C. 70% of Estima D. Maximum \$0 E. Total Incenti	Ited Project Costs Incentive Cap: 50 per kWh (Project Level) Incentive Cap: ve = Lesser of "A", "C", and	N	I/A I/A			
		C. 70% of Estima D. Maximum \$0 E. Total Incenti	ted Project Costs Incentive Cap: .50 per kWh (Project Level) Incentive Cap: ve = Lesser of "A", "C", and "D" above:	N N \$	I/A I/A 111			
		C. 70% of Estima D. Maximum \$0 E. Total Incenti	ted Project Costs Incentive Cap: .50 per kWh (Project Level) Incentive Cap: we = Lesser of "A", "C", and "D" above:	N N S	I/A I/A 111			
		C. 70% of Estima D. Maximum \$0 E. Total Incenti * The dollar amounts listed in the Pro	ted Project Costs Incentive Cap: .50 per kWh (Project Level) Incentive Cap: ve = Lesser of "A", "C", and "D" above:	N S based on the avail	I/A I/A I111	centives for w	which this	
		C. 70% of Estima D. Maximum \$0 E. Total Incenti * The dollar amounts listed in the Pro project may qualify. Actual incentive:	ted Project Costs Incentive Cap: .50 per kWh (Project Level) Incentive Cap: ve = Lesser of "A", "C", and "D" above: oject Detail Summary estimated s paid may vary based on, but not I	N S based on the avail imited to, the follow	//A //A l111 lable utility ind wing factors: 1	centives for w	which this	
		* The dollar amounts listed in the Proproject may qualify. Actual incentive measures must be approved by BPA; project	ted Project Costs Incentive Cap: (50 per kWh (Project Level) Incentive Cap: ve = Lesser of "A", "C", and "D" above: oject Detail Summary estimated s paid may vary based on, but not I and 2) utility incentives may be cap	N S based on the avail imited to, the follow oped based on a pr	//A //A lable utility ind wing factors: 1 redetermined	centives for w) all non-sta maximum in	which this ndard centive per	
		* The dollar amounts listed in the Proproject may qualify. Actual incentive measures must be approved by BPA; project.	ted Project Costs Incentive Cap: Cap: Cap: Cap: Incentive Cap: ve = Lesser of "A", "C", and "D" above: Description of Lamba and point Detail Summary are estimated s paid may vary based on, but not L and 2) utility incentives may be cap savings is 3% of the project cost. Y	N S based on the avail imited to, the follow oped based on a pr four utility can over	I/A I/A lable utility inu ving factors: 1 redetermined ride this value	centives for v) all non-sta maximum in	which this ndard centive per	
		* The dollar amounts listed in the Proproject may qualify. Actual incentive measures must be approved by BPA; project. ** The default value for annual O&M *** The kWh savings reported in the	ted Project Costs Incentive Cap: Cap: Cap: Cap: Incentive Cap: ve = Lesser of "A", "C", and "D" above: Digect Detail Summary are estimated s paid may vary based on, but not I and 2) utility incentives may be cap savings is 3% of the project cost. Y Project Detail Summary may differ	N N S based on the avail imited to, the follow pped based on a pr four utility can over from those reporte	I/A I/A lable utility ind wing factors: 1 redetermined ride this value d above in the	centives for v) all non-sta maximum in t. e Project	which this indard centive per	
		C. 70% of Estima D. Maximum \$0 E. Total Incenti The dollar amounts listed in the Pro project may qualify. Actual incentive measures must be approved by BPA; project. The default value for annual O&M *** The kWh savings reported in the Overview due to adjustments made	ted Project Costs Incentive Cap: Cap: Cap: Cap: Cap: Incentive Cap: ve = Lesser of "A", "C", and "D" above: Digect Detail Summary above: spect Detail Summary above: savings is 3% of the project Cost. Y Project Detail Summary may differ to savings in the Project Detail Sum or that a network and the project Detail Summary may differ to savings in the Project Detail Summary may differ	N S based on the avail imited to, the follow oped based on a pr from those reporte many. Savings figur i a cuiner former	//A //A lable utility ind wing factors: 1 redetermined ride this value d above in the res in the Proj o the project	rentives for w) all non-stai maximum in 5. e Project ect Durbil	which this indard centive per	
		* The dollar amounts listed in the Proproject may qualify. Actual incentive measures must be approved by BPA; project. ** The default value for annual O&M *** The kWh savings reported in the Overview due to adjustments made Overview are estimated on-site savin Summary have been adjusted for fee	ted Project Costs Incentive Cap: Cap: Cap: Cap: Cap: Cap: Incentive Cap: ve = Lesser of "A", "C", and "D" above: oject Detail Summary Cap: and 2) utility incentives may be cap savings is 3% of the project Cost. Y Project Detail Summary may differ to savings in the Project Detail Sum rigs that a customer may realize, wh leral standards and BPA busbar.	N S based on the avail imited to, the follow pped based on a pr four utility can over from those reporte imary. Savings figures i ile savings figures i	//A //A l111 edetermined ride this value d above in the res in the Proj n the Project	sentives for w) all non-stat maximum in s. e Project ect Detail	which this ndard centive per	
		C. 70% of Estima D. Maximum S0 E. Total Incentiv The dollar amounts listed in the Pri project may qualify. Actual incentive measures must be approved by BPA; project. The default value for annual O&M *** The kVM savings reported in the Overview due to adjustments made I Overview are estimated on-site savin Summary have been adjusted for fec	ted Project Costs Incentive Cap: Cap: Cap: Cap: Cap: Incentive Cap: ve = Lesser of "A", "C", and "D" above: Digect Detail Summary we estimated s paid may vary based on, but not I and 2) utility incentives may be cap l savings is 3% of the project cost. Y Project Detail Summary may differ to savings in the Project Detail Sum rgs that a customer may realize, wh leral standards and BPA busbar.	N S' based on the avail imited to, the follow oped based on a pr four utility can over from those reporte imary. Savings figures i avings figures i	//A //A 111 able utility in: wing factors: 1 redetermined d above in the res in the Project i	centives for w) all non-stat maximum in s. e Project ect Detail	which this ndard centive per	
		C. 70% of Estima D. Maximum S0 E. Total Incentive measures must be approved by BPA; project. The default value for annual O&M *** The kWh savings reported in the Overview due to adjustments made I Overview are estimated on-site savin Summary have been adjusted for fee	ted Project Costs Incentive Cap: Cap: Cap: Cap: Cap: Incentive Cap: ve = Lesser of "A", "C", and "D" above: opect Detail Summary cap estimated s paid may vary based on, but not I and 2) utility incentives may be cap I savings is 3% of the project cost. Y project Detail Summary may differ to savings in the Project Detail Sum ugs that a customer may realize, wh leral standards and BPA busbar.	N S' based on the avail imited to, the follon oped based on a pr four utility can over from those reporte mary. Savings figures i ile savings figures i	//A //A 111 mable utility in wing factors: 1 edetermined d above in the Project i n the Project i	centives for w) all non-stat maximum in b b Project ect Detail	which this indard centive per	
		C. 70% of Estima D. Maximum S0 E. Total Incenti The dollar amounts listed in the Pri project may qualify. Actual incentive: measures must be approved by BPA; project. The default value for annual O&M "The dvMn savings reported in the Overview due to adjustments made I Overview are estimated on-site savin Summary have been adjusted for fect	ted Project Costs Incentive Cap: Cap: Cap: Cap: Cap: Incentive Cap: ve = Lesser of "A", "C", and "D" above: opect Detail Summary we estimated s paid may vary based on, but not I and 2) utility incentives may be cap I savings is 3% of the project cost. Y project Detail Summary may differ to savings in the Project Detail Sum ugs that a customer may realize, wh leral standards and BPA busbar.	N S' based on the avail imited to, the follow pped based on a pr four utility can over from those reporte mary. Savings figures i ile savings figures i	//A //A 111 wing factors: 1 edetermined d above in the Project i n the Project i	centives for w) all non-stat maximum in b b Project ect Detail	which this indard centive per	
		C. 70% of Estima D. Maximum 50 E. Total Incenti The dollar amounts listed in the Prr project may qualify. Actual incentive: measures must be approved by BPA; project. The default value for annual O&M "** The default value for annual O&M *** The default value for annual O&M *** The default value for annual O&M *** The default value for annual O&M summary have been adjusted for fee updated 1/27/2025 13:47 (EST)	ted Project Costs Incentive Cap: Cap: Cap: Cap: Locentive Cap: ve = Lesser of "A", "C", and "D" above: Descention of "A", "C", and "D" above: opect Detail Summary we estimated spaid may vary based on, but not I and 2) utility incentives may be cap savings is 3% of the project cost. J' Project Detail Summary may differ to savings in the Project Detail Sum igs that a customer may realize, wh leral standards and BPA busbar.	N S based on the avail imited to, the follow pped based on a pr four utility can over from those reporte mary. Savings figures i ile savings figures i	//A //A 111 mable utility ini wing factors: 1 edetermined adetermined ad above in the Project i n the Project i	centives for w) all non-sta maximum in s. e Project ect Detail	which this ndard centive per	

• When done, use the return arrow and get back to the main page, click the **Sync** button, then the information will be sent to the Hancock cloud.

When done in MINT

- > When the project is 100 percent completed in MINT, click the Mark Project as Done button.
 - Note: this will remove the project from the front page of MINT.
 - You'll have one more chance to back out if needed.

Bill Crabtree Bill Crabtree		
143 Main St. <city>, <zip> Project: Canby</zip></city>	Assessment	Mark Project as Done
"DP 1-1-24 to 12-31-24"	Client into Building Into Date	
Items (1/1)	Proposals (1)	

Mark Project as Done, return to the main page, and sync MINT back to the Hancock Cloud. Please ensure you are connected to a network when you sync.

	Do you want	to mark t	he Project		
	Bill Cra	btree Bill Crabtr	ee		
143 Main St.					
Phone (503) 111-2222					
140					
140					
a	s done and read	dy for syn	chronization	?	
			_		
Cancel				Mark Project	as Done

Finishing in the Hancock Cloud

Now that the project has synced from MINT back to the Hancock Cloud, it is time to send it to the utility. Click on the **Project** button and find the project to be moved along (invoiced). Our example is project 0000000140. Double click the **Project Number** to open it.

	PROJEC	ст		
Admin		Nore • Process All 138 Records		[
Application		Client Name	Project Number	Job Type
Allocation		Q	Q	Q
Container		Trade Ally Utility Handoff	Trade Ally Utility	
Container	D D	Aaron 12.18.2024	Trade Ally Utility	
Project 🦰	D D	Recalc Test Project	Trade Ally Utility	
Invoice	D D	Project Name Test 12/18	Project Name Test	
Configuration		New Construction Reports Lindsey Test	000000146	
	D D	Peter Floyd	000000145	
Measure	0 0	Kirk Beets and kWh savings test	000000144	
Export Data	D D	Trade Ally 12/18	000000143	
Vendor		12/17 Project Name Test	Test Name	1
Project Approval		TA Invoice Test	000000141	
	D	Bill Crabtree Bill Crabtree	000000140	

Open the Measure Management bar and click on the Assign Allocation line from the drop-down menu to connect to the correct rate period.

Project Detail										ð
Project Info	Client Info Building Info Validate Invoice			ļ	Project H	History: Current	* More	 All Repo 	orts * Save	Cance
Client Name:	Bill Crabtree Bill Crabtree	Address:	143 Main St., Canby, OR 97123	County:						
Total Cost:	\$ 0.00	Completed Date:		Allocati	ons:	DP 1-1-24 to 12	31-24 🔇			
Project Name:	0000000140	Unique Site ID:	140	Sector	S	elect				्र
Funding Source:	Select 👻									
Notes: Add Note(s) here	4									
Schedule	-									~
Measure Mana	ngement									
Co Ass	ign Allocation	DP 1-1-24 to 12-31-2	4 🕲	A	pply	Clear Search	Save	Cancel	Save Profile	Total: 1

- > Choose the correct allocation (rate period), check the box, then click the **Apply** button.
 - Note: if not entered via MINT, enter the total costs to proceed.

Measure Management								
Assign Allocatio	n *	DP 1-	1-24 to 12-31-24 🚫			Apply	Clear Search	Save
Class Identify	Area Name	Measure Name	Invoice Status		Total Cost	R	emaining Amoun	nt
94	Q	٩	٩	Q	Q			Q
Ighting	office	Lighting Replacement			\$0.00		\$0.0	0

Click X in the upper right to return to the **Project** section, click on the small box next to the project, then click the **Invoice** button.

	P	ROJEC	ст						L v
Admin	6		Nore 🔻	Process All 138 Records		\rightarrow	Invoice	Validate	Delete
Application			Clien	t Name	Project Number	Job Type	AII	ocation(s)	
Allocation			Q		Q	Q	Q		
Container			Trade	Ally Utility Handoff	Trade Ally Utility		DP	1-1-24 to 12-	31-24
Container			Aaron	n 12.18.2024	Trade Ally Utility		DP	1-1-24 to 12-	31-24
Project			Recal	c Test Project	Trade Ally Utility		DP	1-1-24 to 12-	31-24
Invoice			Proje	ct Name Test 12/18	Project Name Test		DP	1-1-24 to 12-	31-24
Configuration		Ш	New	Construction Reports Lindsey Test	000000146		DP	1-1-24 to 12-	31-24
			Peter	Floyd	000000145		20	24, DP 1-1-24	to 12-31-
Measure			Kirk E	Beets and kWh savings test	000000144		DP	1-1-24 to 12-	31-24
Export Data		Ш	Trade	Ally 12/18	000000143		DP	1-1-24 to 12-	31-24
Vendor			12/17	Project Name Test	Test Name		DP	1-1-24 to 12-	31-24
Project Approval		C	TA In	voice Test	000000141		DP	1-1-24 to 12-	31-24
r oject Approval			Bill C	rabtree Bill Crabtree	000000140		DP	1-1-24 to 12-	31-24

Confirm the correct allocation has been entered, then pick an invoice number or New Invoice checkbox (used for our example), then click the Save button.

Create Invoice	×
Allocation	
DP 1-1-24 to 12-31-24 🚫	
New Invoice 🕑 🚽	
Reporting Month	
2024-12	
Invoice Number	
Select Month 👻	
Save	Cancel

- Go to the Invoice page, find the project, double click on the invoice number to get the Direct Costs View screen.
 - Click the **Check Box** and then press the **Submit** Invoice button.

Invoice	□ ∨ DP 1-1-24	25 2024-12 Invoice (fr \$500.0
Configuration	Direct Costs View :	Direct Cost 🗸	Submit Invoi
Measure	Job Number	Client Name	Contractor
Export Data	Q	٩	Q
Vendor	✓ > <u>000000140</u>	Bill Crabtree Bill Crabtree	

> The Status will be **Invoiced** (From TA to Utility).

Utility Work

- After the trade ally submits the package/project to the utility, it is the utility's turn to review and process it.
 - From the **Invoice Sidebar** menu, the options vary depending on the user and their type (i.e. Invoice screens will be different for Trade Allies vs. Utilities).
 - Click on the Invoice bar, then click on the Invoice Number.

	INVO	DICE				William_Crabtre	e_BPA_Admin		MINT 🔞 Su	upport 🔥 S	ign Out
Admin	G	More - Project Number	Contractor	New	Save Ca	encei All		Filters	Clear Search	Save Profile	Export
Application	a	Allocation Invoice	Number Report	Status	Direct Cost	Indirect C To	al Cost Invoi	ce D Pa	iyment Payme	ent Agency	Atta
Allocation		Q Q	Q	Q.	Q,	Q Q	Q	i 0	Ö	Q	
	\bigcirc	RP_FY24	42 2025-01	Invoiced (from TA to Utility)	\$110.00	\$0.00	\$110.00 02/05	/2025		BPA	
Container	\circ	RP_FY24	41 2025-01	Submitted to BEETS	\$28,389.16	\$0.00 \$28	.389.16 02/05	/2025		BPA	- 222
Project	$\Box \rightarrow$	RP_FY24	40 2025-01	Submitted to BEETS	\$27,446.00	\$0.00 \$27	446.00 02/05	/2025		BPA	
Invoice	\circ	RP_FY24	39 2024-12	Submitted to BEETS	\$360.00	\$0.00	360.00 01/31	/2025		BPA UAT T	f
	\bigcirc	RP_FY24	38 2025-01	Submitted to BEETS	\$574.91	\$0.00	5574.91 01/31	/2025		BPA Child	
Configuration	\bigcirc	RP_FY24	37 2024-12	Invoice (from Utility to BEETS)	\$22,579.82	\$0.00 \$22	.579.82 01/30	/2025		BPA	
Export Data	\circ	RP_FY24	36 2024-12	Submitted to BEETS	\$360.00	\$0.00	360.00 01/28	/2025		BPA	
Vendor	\Box >	RP_FY24	35 2024-12	Submitted to BEETS	\$360.00	\$0.00	360.00 01/24	/2025		BPA	
	\Box >	RP_FY24	34 2024-12	Submitted to BEETS	\$788.40	\$0.00	788.40 01/14	/2025		BPA Child	
Project Approval	0 >	RP_FY24	33 2024-12	Invoiced (from Tempo Utility)	\$800.00	\$0.00	800.00 01/13	/2025		BPA	
	\circ	RP_FY24	32 2025-01	Submitted to BEETS	\$342.25	\$0.00 1	342.25 01/10	/2025		BPA Child	-

With the Direct Costs View screen open, check the box next to the job number and click on the arrow (caret) to get to Job Cost Details.

	IN	/OICE														1	William_	Crabtree_BPA_Ac	dmin	D N		Support :	🖌 Sign Out
Admin	G	More	Project I	Number		ontractor							Net	w	Save	Cancel	IA		•	Filters	Clear Search	Save Profile	e Expor
Application	0	Allo	cation	Invoice	Num	Reporting M	Status	D	irect Cost	Indirect C	ost	Total Co	ost I	Invoice	Date	Payme	nt Date	Payment Nu	Agen	icy.	Attached In	voice	
Allocation		Q		Q		Q	Q	Q		Q	Q		1	٩	Ċ.	Q			Q				
Container		✓ RP_F	Y24_FY25		42	2025-01	Invoiced (fro		\$110.00	\$0	.00	\$110.	00 0	02/06/2	025				BPA				
Project		G Dir	ect Costs 1	View :	Direct C	ost 👻	Submit Invoic	e Mo	ore 🕶							Save	Cancel	Clear Search	Expo	rt U	pload Projects	Check Result	Total: 1
		Jo	b Number		Clie	nt Name	Contractor		Submi	t Status				Messa	ige	+	Address					Total Cost	
Configuration		۹ م			Q		Q		Q					Q		(2				Q		
Export Data	0	> 00	00000203		BC	est 2/4			Invoice	d (from TA to	Utility)					,	01 Main,	Aberdeen, WA 988	88			\$110.00	•

Select the Job with the checkbox in the Job Cost Details section, go to the Submit Status (drop down menu) box and select Approved, then click the Apply button.

	INVOICE			William_Crabtree_BPA_Admin	🛯 MINT 🛛 Ø Support 🔥 Sign Out
Admin	G More • Project Number Contractor		New	Cancel All 👻	Filters Clear Search Save Profile Expor
Application	Allocation Invoice Num Reporting M	Status Direct Cost I	ndirect Cost Total Cost Invoice Date	Payment Date Payment Nu Ager	ncy Attached Invoice
Allocation	Q Q Q	Q Q Q	Q Q 🖬	० 🖬 ०	
Container	○ ∨ RP_FY24_FY25 42 2025-01	Invoiced (fro \$110.00	\$0.00 \$110.00 02/06/2025	BPA	
Project	Direct Costs View : Direct Cost	Submit Invoice More +	Sa	ve Cancel Clear Search	rt Upload Projects Check Result Total: 1
	Job Number Client Name	Contractor Submit Sta	tus Message	Address	Total Cost
Configuration	Q Q	۵ ۵	٩	Q	9
Export Data	BC test 2/4	Invoiced (fr	om TA to Utility)	101 Main, Aberdeen, WA 98888	\$110.00
Vendor	Job Cost Details			bubmit Sta	itus Apply Clear Search Total: 1
Project Approval	Allocation Measure	Submit Status	In Allocation Invoice Budget Typ	e Contractor Open	Total Cost Comment
	Q Q	Q	۹. ۹	Q Invoiced (fr	rom TA to UI
-	RP_FY24_FY25 Lighting Replacement in office	Invoiced (from TA to Utility)	NoBudget	Rejected	\$110.00 😐
				Approved	
	> RP_FY24_FY25 41 2025-01	Submitted to \$28,389.16	\$0.00 \$28,389.16 02/05/2025		

- > Return to the **Invoice** side menu area, then double-click on the **Invoice Number**,
 - Click the **checkbox** next to the **Job Number** and click on the **Upload Projects** button. This will change the status and confirm it was uploaded.

= HANCOCK SOFTWARE	INVOICE INVOICE
Admin	More * Project Number Contractor New Save Cancel All * Filters Clear Search Save Profile Exp
Application	Allocation Invoice Num Reporting M Status Direct Cost Indirect Cost Total Cost Invoice Date Payment Date Payment Nu Agency Attached Invoice
Allocation	
Container	□ V RP_FY24_FY25 42 2025-01 Approved \$110.00 \$0.00 \$110.00 02/06/2025 BPA
Project /	Direct Costs View : Direct Cost v Submit Invoice More * Submit Invoice More * Save Cancel Clear Search Export Upload Projects Check Result Total: 1
Invoice	Job Number Client Name Contractor Submit Status Message Address Total Cost
Configuration	
	<u>> 0000002033</u> BC test 2/4 Approved 101 Main, Aberdeen, WA 98888 \$110.00

> You will note the **Submit** status has been changed to Submitted to BEETS.

■ HANCOCK SOFTWARE	INV	DICE														1	William,	Crabtree_BP4	Admin	۵	MINT 0	Support 4	🖌 Sign Out
Admin	G	More 🕶	Project Nu	mber][ce	ntractor						_	Ne	w	Save	Cance	IIA]		•	Filte	rs Clear Search	Save Profile	e Export
Application	O	Allocat	tion	Invoice Nu	um	Reporting M	Status		Direct Cost	Indire	ct Cost	Total C	ost	Invoice	Date	Paym	ent Date	Payment N	u Ag	ency	Attached In	voice	
Allocation		٩		۹		٩	۹	1	Q,	Q	33	2		Q	۵	٩,			Q				
Container	0	RP_FY2	4_FY25		42	2025-01	Submitted to	***	\$110.00		\$0.00	\$110	0.00	02/06/2	025				BP	A			
Project	G	Direc	ct Costs Vi	ew: Di	irect Co	st 💌	Submit Inv	olce	More +							Save	Cancel	Clear Searc	in Exp	ort	Upload Projects	Check Result	Total: 1
	0	Job	Number		Clie	ent Name	Contra	ctor	5	Submit Stat	tus		Me	ssage		Add	lress		h			Total Cost	
Configuration	-	Q			Q,		Q			a,			Q,			Q			~		Q		
Export Data	0	> 000	0000203	_	BC	test 2/4			\$	iubmitted t	o <mark>BEETS</mark>					101	Main, Abe	rdeen, WA 988	88			\$110.00	•

Congratulations! Your Project has been submitted to BEETS!

Utility Incentive Cost Adjustments

To review and edit Utility's incentive costs, log into the Hancock Cloud as a utility admin and click the More button.

	A	DM	N							-	L Wi	lliam_Crabtre	e_BPA_Admin		0 s	upport 🛃 Sigi
Admin 📃		Orga	nization Intal	ke Template	User Log	gin Details	1	Failed Login De	tails MINT Da	ta Mapping	BO Ma	nagement	Bulletin Board	Audit Log	More *	
Application	G	1	Process ALL 14	2 Records	User	r Name								Add	clete	Clear Search
Allocation	0		Short Name	Organizatio	n Name	Inact	ive	Org Code	Business Type	Business Fr	unction	FED Tax ID	State Tax ID	Email	Can	Create Organizations
Container			Q,	Q		(All)	٠	Q	Q	Q		Q	Q,	Q,	(All)	
	0	>	Richland	Richland				10089	Utility							
Project		>	USN Bangor	USN Bangor				10409	Utility							
Invoice	O	>	Okanogan Coop	Okanogan C	oop			10285	Utility							
Confermation	0	>	KTU	кти				13927	Utility							
Configuration	0	>	Albion	Albion				10055	Utility							
Export Data	0	>	Ellensburg	Ellensburg				10072	Utility							
Vendor	0	>	Monmouth	Monmouth				10083	Utility							
	0	>	Northern Lights	Northern Lig	hts			10278	Utility							
Project Approval	0	5	Whatcom	Whatcom				10451	Utility							

> Click on Simple Tables, select to see the tables available, then click on the Rate Period desired.



The utility administrator is able to adjust the Utility Incentive amounts in the Utility Incentive column.
 Note: utility incentives may be equal to or less than the standard (BPA) incentive.



New Construction in MINT

- > Enter the project in Hancock Cloud as described above and sync with MINT.
 - Click the View Project button in MINT.
 - Note: using the customer name or project name to ID the project as new construction is very helpful in identifying the project in MINT.

Hom Projects Currenti	e v Assigned			
r ojeco ourona	, rosigned			
3 Projects	Filter Projects		۹	1
William Crabtree e2e test	Û	୧ଚି	1	Accou
Cannon Beach Date: 1/15/2025 2:08:00 PM () ToDo: (0) Completed: (0) Items: (0) Photos: (0) Notes: (0)	Delete Measures: (1)	Directions Docs: (0)	View Project	
William Crabtree e2e test 2	Û	99	1	
IN PROGRESS Site Assessment File. Date: 1/31/2025 10:41:00 AM () ToDo: (0) Completed: (0) Items: (1) Photos: (0) Notes: (0)	Delete Measures: (1)	Directions Docs: (0)	View Project	
BC New Consruction 2/7 BC NC 2/7	Û	66	6	
IN PROGRESS Site Assessment File, Date: 2/7/2025 2:31:00 PM () ToDo: (0) Completed: (0) Items: (0) Photos: (0) Notes: (0)	Delete Measures: (0)	Directions Docs: (0)	View Project	

> Click on the **Building** Info button and start the entries to make it a **New Construction** Project.

Hancock MINT		-	
ligned in as William_Crabtree_BPA_Admin			All Files
←	Project Overview: Site Assessment IN PROGRESS		
BC New Consruction 2/7 BC No <address> Aberdeen, 98888 Project: 0000000210 "RP. EV24. EV25"</address>	Client Info Building Info Date		Mark Project as Done
Items (0/0)	This Project has no proposals.		

> Selecting "yes" to any of the **Baseline Eligibility** questions will make the project New Construction.

BC New C	ionsruction 2/7 BC NC 2/7	
	Saved Notes Save I	Last Note New Note
Mode	Deemed	_
OM Savings (%)		
Baseline Elegibility	1	l≽
Is the facility or exterior lighting system newly constructed?	Yes	•
Is the facility anewly constructed addition to an existing facility?	No	¥
Is there a change in the occupancy type as part of the lighting project?	No	T
Is the project a major renovation for reasons other than lighting?	No	•
Based on your responses the project is defined as:	New Construction	•

When all required info is entered (Note: red box and red asterisks indicate required items), MINT will do its calculations.

	Building Info
•	3C New Construction 2/7 BC NC 2/7
05	
	Saved Notes Save Last Note New Note
Exterior-Power (Watts)	2500
Exterior-Affected Square Footage	1000
Exterior-Incentive	1577.46576
Exterior-Code Baseline (kWh)	21900 MINT Calcs
Exterior-Proposed (kWh)	10950
Exterior-Unadjusted Savings (kWh)	10950
Exterior-Savings %	50
Exterior-Adjusted Savings (kWh)	12134.352

Administrative Account Functions

Adding Users by Administrators. Only users with administrative rights can add others to their respective utility or trade ally. To add a user to your organization, log in with the administrative username and password. Then, click on the Admin Bar, locate the appropriate organization Name and click the Short Name.

	ADMIN				-	L William_Cra	btree_BPA_Admin	MINT	Ø St	upport 🖈	Sign Out	
Admin 🛌	Organization Intake T	emplate User Login Details	Failed Login D	etails MIP	(T Data Mapping	BO Management	Bulletin Board	Complete P	roject Expo	rt Mapping	More *	
Application	Process ALL 3 Reco	ords bpa 🛞						Add	Delete	Clear Search	Export	
Allocation	Short Name	Organization Name	Inactive	Org Code	Business Type	Business Functio	n FED Tax ID	State Tax ID	Email	Can C	reate Organic	
Container	🕸 bpa	Q	(All) *	Q.	Q	٩	Q	٩	٩	(Ali)		
Project	BPA Child Bonneville Expedition	BPA Child Bonneville Expedition		12345	Utility						0	
Invoice		Bonneville Power Administration		13738								
Configuration												
Export Data	G User Roles									Ad	id Expoi	
Vendor	Role Name	Role Description										
Project Approval	BPA User	Same as BPA Admin role.	but can't chang	e budget								
	BPA Admin	BPA Administrator for We	atherization, wi	th access to all	low income workfle	ow and configuration	screens					
	Trade Ally User	Basic user privileges, abili	ty to view user p	projects regard	less of utility associ	ation						
	Utility View Only Same as Utility User role, but can't edit											
	Trade Ally Manager Trade ally Manager for Weatherization, with access to admin screens											
	Users						_	Add	Edit	Clear Searc	h Export	
	D Login Name	Full Name Ex	ternal User ID	Address	Zip City	State E	mail	Phon	ie1	User Role	Active	
	۹	۹. ۹		Q.	Q Q	٩. (2	Q	30	Q	Q	
	W_Crabtree_BPA_User	W_Crabtree_BPA_User			97201 United	States v	ecrabtree@bpa.gov	5032	303279	BPA User	Yes	

	ADMIN						1	William_Crabtree_B	PA_Admin		O Support	Sign Out
Admin 🛻	Organization Intake Te	mplate User Login Details	Failed Login Details	MINT Data	Mapping BO	Management	Bulletin Board	Audit Log More	*			
Application	G Process ALL 142 Rev	cords Otar Narra								Add	Delete Clear Search	Export
Allocation	Short Name C	Organization Name	Inactive	Org Code	Business Type	Business Fu	nction FED Tax ID	State Tax ID	Email	Can	Create Organizations	Allows
Container	Q (a,	(AI) *	Q,	Q,	а,	9,	Q,	0,	(AI)		Q,
Project	C > Farmers F	armers		10174	Utility							
	Nespelem N	lespelem		10273	Utility							
Invoice	> Lakeniew L	akeview		10235	Utility							
Configuration	> K ⁰	ionneville Power Administration	0	13738							8	
Export Oata												
Vendor	User Roles									Adv	Export Total: 5	
Project Approval	O Role Name	Role Description										
	BPA User	Same as 8PA Admin n	sle, but can't change budge	e .							1.1	
	BPA Admin	8PA Administrator for	Weatherization, with acces	is to all low incom								
	Trade Ally User	Basic user privileges ability to view user projects regardless of utility association										
	Utility View Only	Same as Utility User n	xle, but can't edit	124								
	Trade Ally Admin	Trade ally Manager for Weatherization, with access to all non-admin screens										
	Users							A	dd Edit	Clear Search	Export Total: 43	
	🗇 Login Name	Full Name	External User ID A	ddress Zip	City	State Er	nail	Phone 1	User Role	Active	User ID	
	0,	Q.	Q. Q	. a	Q.	a a		Q.	Q	Q	Q	
	W_Crabtree_BPA_User	W_Crabtree_BPA_User		9720	United States	w	ecrabtree@bpa.gov	5032303279	8PA User	Yes	38e13fb5-a99e-4f19-8	
	Brice_Lang_BPA_USER	Brice Lang				be	lang@bpa.gov		BPA User	Yes	\$b0c9cb2-af0b-41a6-a	

Click the Add button, you will see the ADD/Edit Organization User screen (which has been completed and ready to save below). Note: all the fields with the red asterisk are required. The Field Role is also required in order to move projects between Hancock Cloud and MINT. Click Save and the new person has been added. The only Program Template is "Primary."

Add/Edit Organization User	
Authentication Type"	la sur esta
Sql Authentication	
Login Name*	Password*
Bill_C_BPA_User	
Full Name*	Required Reset Password Inactive Unlock User
Bill E Crabtree	
Phone	Email
	wecrabtree@bpa.gov
Address	ZIP
City	State
BPI Number	BPI Expiration Date
User Role*	Field Role Required!
BPA User	✓ Auditor ⊗
Program Templates*	
Primary 🕲	

Save Cancel

Miscellaneous Tips

The Hancock Cloud has a quick link to resources in the bottom left of the screen called Release Notes. Click it to activate, you will see the direct connection to the Commercial Lighting page on bpa.gov.

SOFTWARE				Antonio anto		2012/2012/01/00	10.01	6.93 o - 7840	101010 ADD20203		· ··	iniam_craber	e_DPA_Admin	U MINI	U S	upport a	sign Out
dmin	Or	rgan	ization Intalo	e Template U	ser Log	in Details		Failed Login De	tails MINT	Data Mapping	80 Ma	inagement	Bulletin Board	Audit Log	More *		
pplication	G		Process ALL 142	Records	User	Name]						Add	Delete	Clear Search	Export
llocation	0		Short Name	Organization N	me	Inact	live	Org Code	Business Typ	e Business I	unction	FED Tax ID	State Tax ID	Email	Can	Create Organizat	tions
ontainer			Q	٩		(All)	*	Q	Q	Q		Q	Q	٩	(AII)		*
	0	>	Richland	Richland				10089	Utility								
ject	0	>	USN Bangor	USN Bangor				10409	Utility								
oice	0	>	Okanogan Coop	Okanogan Coop				10285	Utility								
nfiguration	0	λ.	KTU	KTU				13927	Utility								
	0	>	Albion	Albion				10055	Utility								
port Data	D	>	Ellensburg	Ellensburg				10072	Utility								
ador	0	>	Monmouth	Monmouth				10083	Utility								
	0	>	Northern Lights	Northern Lights				10278	Utility								
yect Approval	0	>	Whatcom	Whatcom				10451	Utility								
	0	>	UEC	UEC				10388	Utility								
	0	>	Mason.1	Mason 1				10246	Utility								
	8	Σ	Bonners Ferry	Bonners Ferry				10062	Utility								
	0	>	DOE-RL	DOE-RL				10426	Utility								
	0	>.	Missoula	Missoula				10259	Utility								
	0	Y	Minidoka	Minidoka				10082	Utility								
	0	>	Big Bend	Big Bend				10027	Utility								
	0	>	Tillamook	Tillamook				10376	Utility								
N	0	>	Idaho Falls Power	Idaho Falls Powe	r			10204	Utility								
	-	-										1.000					•
	10	20	50 100									Page 1	of 8 (142 items)	2	3 4	5 6 7	8 >
	242.03	(Feb	06, 01:09)												Copyrigh	t ©2025 Hancock	k Software

Release Notes

For the LC Program Requirements and LC Program Offerings, please click the link below to go to the BPA Commercial Lighting website.

Commercial Industrial Lighting

5

ок

×