User Guide - How to view and access bid information and submit a proposal

Begin by logging in to your PEPMA account.

If you do not have an account you can self-register on the Home page.

Once you have logged into your account you should see the bid information* for the bid you received an invitation to from the Investor Owned Utility IOU.
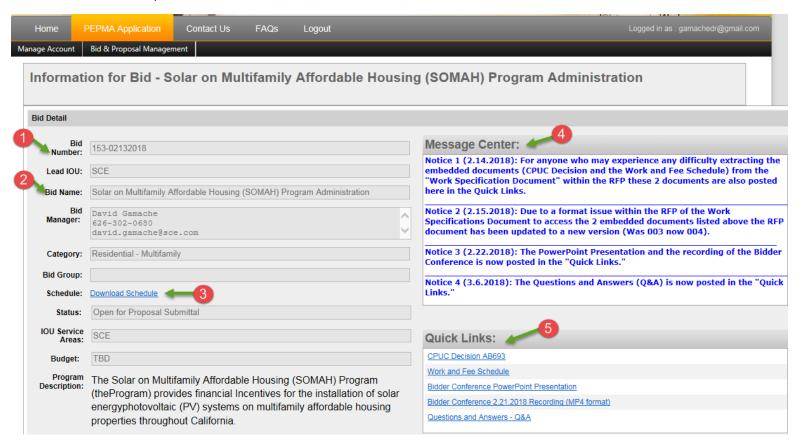
> ***Note:** If you do not see the bid information as shown in the sample bid below then contact the appropriate IOU to have access granted to the bid. IOU contacts are listed under the "Contact Us" section on the PEPMA Home page.

When logged into your account and you see the name of the bid **(A)** there are 3 options to choose. The first option is to access the bid information and documents to bid **(B)** on the "Bid Page". The second option is to submit a bid proposal **(C)** on the "Manage Proposals" page and the last option is to delete or "Remove" the bid from your account **(D)** that will be explained at the end of this document.
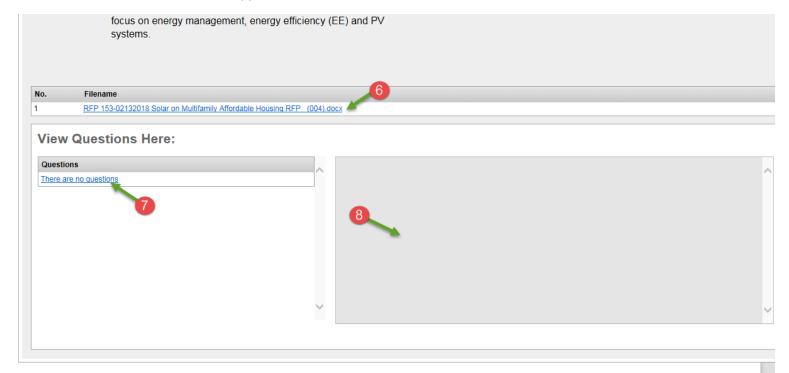
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When selecting to go to the **Bid Page (B)** the following information is available:

(1) **Bid Number:** Unique bid identification number
(2) **Bid Name:** Full name of the bid
(3) **Schedule:** A schedule overview with key dates may be available for download here. A full schedule is generally available in the actual Request for Proposal (RFP or other type of request RFx).
(4) **Message Center:** Messages relating to the Quick Links.
(5) **Quick Links:** Contains additional information available throughout the RFx process. This can include Addendums announcing changes to the RFx, additional documents, Question and Answer (Q&A) responses by the IOU, bidder conference presentation, etc.

(6) **Filename:** This is a link to the actual RFx document. Click on the link for the option to download the document.
(7) **Questions:** Allows a bidder to enter a question about the bid up until the RFx schedule end date for question submittal. Questions can be typed in or pasted in from another document, such as a Microsoft Word doc.
(8) **Text box:** Questions entered will appear in this text box.

focus on energy management, energy efficiency (EE) and PV systems.

No.	Filename
1	RFP 153-02132018 Solar on Multifamily Affordable Housing RFP (004).docx

View Questions Here:

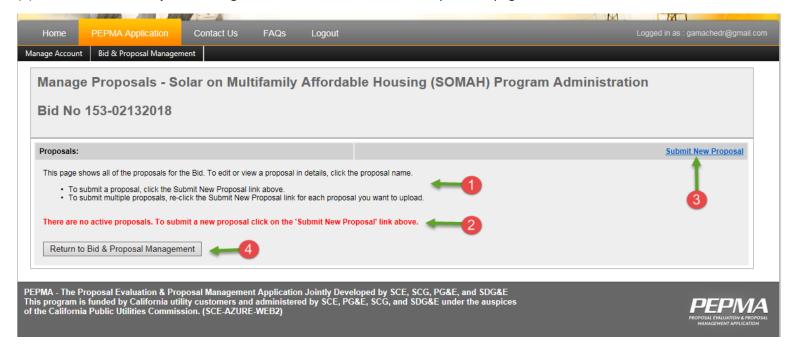| Questions |
|-----------|
| There are no questions |

PEPMA - The Proposal Evaluation & Proposal Management Application Jointly Developed by SCE, SCG, PG&E, and SDG&E
This program is funded by California utility customers and administered by SCE, PG&E, SCG, and SDG&E under the auspices of the California Public Utilities Commission. (SCE-AZURE-WEB2)

PEPMA
PROPOSAL EVALUATION & PROPOSAL
MANAGEMENT APPLICATION

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When selecting to go to **Manage Proposals (C)** the following options are available:
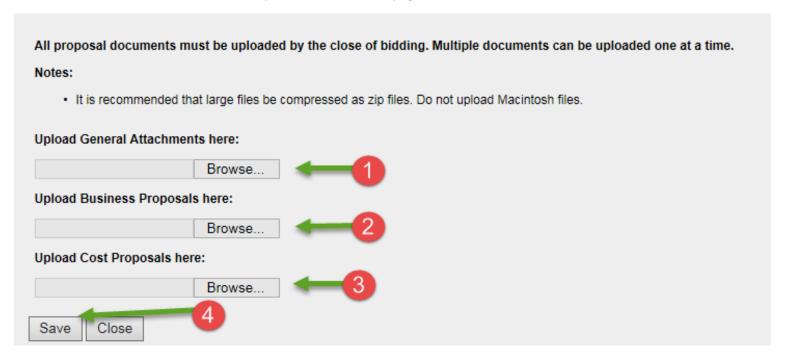
(1) Brief proposal submittal instructions.
(2) Indicates if a proposal has or has not yet been submitted.
(3) **Submit New Proposal:** Clicking on this link takes the bidder to the bid submission page to upload a proposal.
(4) **Return to Bid & Proposal Management:** Returns the bidder to the previous page.

When choosing to **Submit New Proposal**, (3) as shown above, the bidder is taken to the bid submission page where there are 3 or 4 sections to upload each specific part of a proposal.

> **Note:** For third-party program bids there is an additional or 4th section requiring an upload. The added section (not shown here) is for the Cost Effectiveness requirements and will require the Cost Effectiveness Tool (CET) information and related documents.
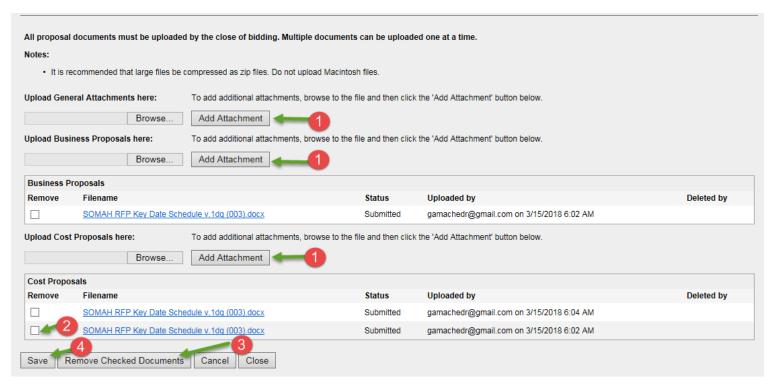
(1) **General Attachments:** This upload is Optional. If a bidder desires to provide additional information not required of the RFx the information can be uploaded here.

(2) **Business Proposal:** This section is REQUIRED. The portion of the bidder's proposal containing the technical written descriptions of the proposed work and other responses to the bid requirements of the RFx excluding any cost elements – See Cost Proposal.

(3) **Cost Proposal:** This section is REQUIRED. The portion of the bidder's proposal containing all commercial terms or cost for the bid are uploaded here. This can include labor rates and tables, program budgets, and any other cost only.

(4) When done "Browsing" and uploading the appropriate portions of the bid proposal click on **Save** to complete the submission. Additional details are provided on the next page below.

All proposal documents must be uploaded by the close of bidding. Multiple documents can be uploaded one at a time.

Notes:

- It is recommended that large files be compressed as zip files. Do not upload Macintosh files.

Upload General Attachments here:

[   ] [Browse...] ← ①

Upload Business Proposals here:

[   ] [Browse...] ← ②

Upload Cost Proposals here:

[   ] [Browse...] ← ③
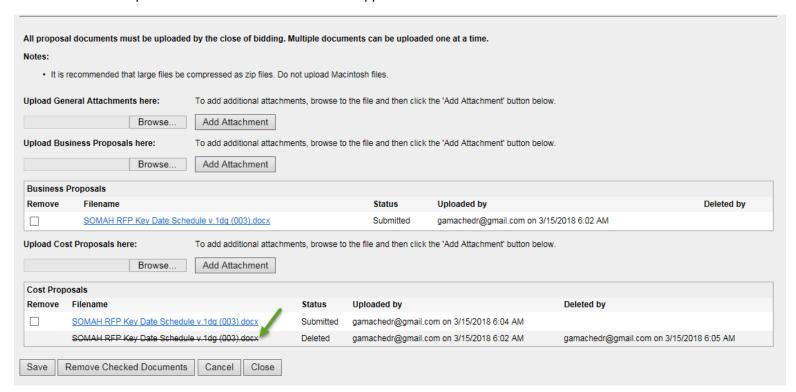
[Save] [Close] ← ④

Details of Attaching a Bid Proposal: For each section, General Proposal (Optional), Business Proposal, and Cost Proposal after selecting "Browse" to locate a file click on Add Attachment **(1)** to add the file. When added the file will appear with details directly below each of the Browse and Add Attachment sections.

Deleting an uploaded file: If a document is uploaded and needs to be removed click on the box below the Remove **(2)** then click on "Remove Checked Documents" **(3)** and when done click Save **(4)**.

> **Note: If any errors occur to uploading the bid proposal documents, such as failure to include a document in a required section, an error notice will appear at the top of the page (not shown).**

All proposal documents must be uploaded by the close of bidding. Multiple documents can be uploaded one at a time.

Notes:

- It is recommended that large files be compressed as zip files. Do not upload Macintosh files.

Upload General Attachments here: To add additional attachments, browse to the file and then click the 'Add Attachment' button below.

[Browse...] [Add Attachment] ⬅ ①

Upload Business Proposals here: To add additional attachments, browse to the file and then click the 'Add Attachment' button below.

[Browse...] [Add Attachment] ⬅ ①

Business Proposals

Remove	Filename	Status	Uploaded by	Deleted by
☐	SOMAH RFP Key Date Schedule v.1dq (003).docx	Submitted	gamachedr@gmail.com on 3/15/2018 6:02 AM	

Upload Cost Proposals here: To add additional attachments, browse to the file and then click the 'Add Attachment' button below.

[Browse...] [Add Attachment] ⬅ ①

Cost Proposals

Remove	Filename	Status	Uploaded by	Deleted by
☐	SOMAH RFP Key Date Schedule v.1dq (003).docx	Submitted	gamachedr@gmail.com on 3/15/2018 6:04 AM	
☐ ②	SOMAH RFP Key Date Schedule v.1dq (003).docx	Submitted	gamachedr@gmail.com on 3/15/2018 6:02 AM	

④ ③

[Save] [Remove Checked Documents] [Cancel] [Close]

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When a document uploaded is deleted or removed it will appear as crossed out as shown below.

Bid Proposal Conformation: Once you have completed the document required uploads and clicked Save the next page will appear providing details of the submission and a confirmation number. You will want to print this page for your records.

The next time you login into your PEPMA account and go to Manage Proposals the name of your bid proposal will appear along with your general contact information and the date/time of the submission. To return to the page you uploaded the proposal you can click on the "Proposal Name" link **(1)** if you need to add additional documents or remove a document.

Changes to bid proposal submissions can be performed until the scheduled RFx bid submission cut-off day and time.

Removing a Bid from Your Bid Page: As noted in the beginning of this document we will now review the bid offer "Remove" option **(D)**.

Use caution when removing a bid from view on your main Bid and Proposal Management page as once removed it cannot be undone. Selecting **Remove** will make the bid offer shown no longer appear. A pop-up screen will appear asking if it is OK to remove the bid offering (RFx) from view. You may "Cancel" or click "OK."

End of Document