

Updating WAP ARRA SERC Plans in PAGE

October 8, 2010

The following are general instructions for updating the WAP ARRA Plans to include information required for Sustainable Energy Resources for Consumers (SERC) plans. These instructions reflect the guidance issued in Weatherization Program Notice 10-19. The relevant sections of WPN 10-19 are noted in **bold** in the document below.

Create a WAP ARRA plan revision and copy documents:

- Select WAP from the left menu panel, and select the WAP ARRA grant from the list of grants
- Select Application Documents from the left menu panel, and your ARRA plans will display under 'Approved Application Packages'
- Select the button in the lower portion of the screen to 'Create New Revision'
- You will be prompted to select a program year (keep the default '2009' for ARRA grants)
- This will setup the new revision, which will be displayed on the Application Documents screen under 'Pending Application Packages'
- To begin updating the revision, select the link for program year for new revision, and the Checklist screen will appear
- At the bottom of the Checklist screen, select the option to 'Add Document'
- Select only the documents that need to be updated for this revision to your plan:
 - o For the SERC revisions, this will typically be the SF424, Annual File, and Budget.
 - o Check the boxes, and click the Save button
- On the Checklist screen, under the list of documents, use the Copy icon in the Status column to copy information from the previous revision of the document (the WAP Annual will be copied automatically)

Update documents as necessary; the following are notes for SERC changes:

- SF424:
 - o Funding in Section 18 should only include new funds for SERC (the application is for new funding, and the WAP ARRA funds have already been approved)
 - o Update other information on the SF424 as necessary
 - o Save changes by clicking the Save button at the bottom of the screen.
- Budget: **(See Section 1 of WPN 10-19)**
 - o You will be adding SERC funds to your WAP ARRA budget, so that the total budget includes both WAP ARRA and SERC funds.
 - o Edit the DOE fund source in Section A
 - The SERC funds should be included in the column for New/Revised Budgets
 - The previously approved WAP ARRA funds should be included in the column for Estimated/Unobligated Funds
 - o Include SERC Funds in Section B
 - To add SERC columns to Section B, select the 'Edit Budget Columns' button just above section B
 - Four new 'SERC' budget categories will appear at the bottom of the list – check the SERC items that need to be added to your budget (leaving existing columns checked), and select the Save button
 - Add funds as required for each new SERC budget column
 - When completed, the totals for section B should match the totals for Section A
 - o Update Budget Justification (PF20A): **(See Section 2 of WPN 10-19)**

- To edit the budget justification, select the name of the 'Object Class' in section B. For example, to edit 'Personnel', click on the word 'Personnel' in the Object Class column of section B.
 - Update the budget justification for each applicable 'object class' to include SERC funds.
- WAP Annual File:
- Add SERC Subgrantees **(See Section 3a of WPN 10-19)**
 - A new section was added to section II.3 for SERC Subgrantees, immediately below the WAP ARRA subgrantee information
 - Click the 'Add New Record' button at the bottom of the SERC Subgrantee section to add a SERC subgrantee
 - Select the link at the top of the screen to 'Search for an existing organization'
 - Enter any portion of the subgrantee's legal name, and select 'Go search'
 - To select a subgrantee for the results of the search, select the green arrow in the left column
 - In the SERC Subgrantee Details screen, enter amounts for Tentative SERC Dollar Amount, and SERC Units.
 - Update counties served and congressional districts served
 - User the 'Remarks' field to capture any additional information for the SERC subgrantee
 - Section II.4 Production Schedule: **(See Section 3b of WPN 10-19)**
 - The Planned SERC Units will display the total for all SERC Subgrantees
 - The SERC Average Unit Cost calculation will display based on figures from the Budget (using the SERC Program Operations column), and the total Planned SERC Units
 - Section II.9 State Plan Hearings: **(See Section 3c of WPN 10-19)**
 - Select the 'Add New Record' button to add a new hearing date and description for publication of the hearing.
 - Section II.11 Miscellaneous **(See Section 3d of WPN 10-19)**
 - A new text field was added to section II.11 for 'SERC Miscellaneous' text.

Submitting WAP ARRA plan revision to DOE:

- After changes to the WAP ARRA Plan have been completed and reviewed, you are ready to submit to DOE for approval
- Under Application Documents in the left menu panel, select the option for 'Verify and Submit'
 - Select the button at the bottom of the screen to 'Verify Application Package'
 - A set of edits will be performed to validate the accuracy of the information in this plan revision.
 - If necessary, make changes to the plan to correct errors
- Sign and Submit
 - Select the button under Verify and Submit to 'Sign and Submit' your application to DOE
 - Enter your pin number (if you have forgotten your pin number, you may change it by selecting 'My Profile' from the blue horizontal menu bar.

If you have any questions or encounter problems, please email PAGE-Hotline@ee.doe.gov or call the PAGE Hotline at 866-492-4546.