

Validation guide (Diablito)

WIKI OVERVIEW

- **Wiki Purpose:** Ensure accurate determination of load requirements by cross-referencing CFE-installed and contracted load information within OPS NOTES to determine the necessity of potential load increase with CFE for eligibility and alignment with project proposals, while adhering to specific documentation criteria for CFE bills and proposal requests.
 - **Wiki Owner:** Joseph Canaan
 - **Validity:** n/a
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Approval Requirements for the Diablito Check

Follow the [Underwriting Criteria \(Mainstream Valid Rules\)](#)

- **Installed and contracted load by CFE info:** Needs to be in OPS NOTES, it is necessary to determine if the case will need a load increase with CFE
- **CFE bill:**
 - Complete and legible
 - No more than 120 days older
 - If there are more than 1 services, all the CFE bills need to be on the same PDF.
- **Proposal request:**
 - Consumptions listed in the proposal request have to be the same as the CFE bill, if not, the project can't be IDB eligible (add *idb_skip* tag) and we will need a write VoBo by the customer attached in OPS NOTES of PP made with estimated consumptions. 🚫
 - Check that the consumptions used for the proposal are correct, it doesn't matter if they're not in the right time period.
 - Check the dates of the readings to know if they correspond to a bimonthly period or more periods in one reading.
 - If there are more than one bimonthly period, you will have to divide it by the amount of bimonthly periods.
 - If the reading is a monthly period, you will have to sum the next period reading.
 - If there is more than one CFE bill, you will have to sum the consumptions of all the bills
 - Check that the "**actual reading**" doesn't have a "**Estim**" rather than a number.
 - **Identify there are not one or more death phases:**
 - It is spotted when the most recent reading, the "**actual reading**" and "**previous reading**" stay the same, so the sum is 0. Pointing out there was no reading for that phase.
 - Or if there are periods where the consumption is zero
- System size:
 - Number of panels > 4

- Solar cover < 105%
- IRR must be between 15%-25% (Only proposals made by Jonah can be under this rate)
- DAC buffer >1500 kWh/year or >15% use
- Tarifa: Must be the same as that on the CFE bill, except:
 - If it's a confirmed commercial case by the customer and the tarifa on the bill is residential (T1 or DAC), the proposal can be for a commercial (PDBT)
 - If it's a GDMTO tariff, the proposal can be for a commercial (PDBT)
- Postal code: Must be the same than the CFE bill and validated on the Installable zones [database](#), if not
 - The EE should upload the written confirmation in OPS NOTES of the Idev team that we can approve the project since there is **no extra** cost for travel expenses or the written confirmation of the Idev team that **we can absorb any extra cost** for travel expenses and we can move forward with the process
- In case the bill contains the legend **NETMET or PHOTOVOLTAIC** means that the client has already an installed PV system. It is necessary to follow the underwriting's disclaimer about installed solar system.

Process to Review and Approve/Reject the Diablito Check

1. Open [the Checklist Approvals](#) from Retool and click the top priority option
2. Open the **CFE bill**.
3. Check that it is no more than **120 days old**. If not, reject *with notes of the situation*.
4. Check that the receipt holder and RPU written in OPS match the bill, if not
 - There must be a SS of the new RPU and CFE service name in case of “Alta y baja” on the lead notes
 - Check on lead notes for an EE explanation (ex. “El servicio es nuevo así que se usó los consumos de su casa anterior para hacer la PP”)
 - If there's nothing on lead notes, reject with notes of the situation.
5. Go to the "Diablito Check" item, check there are the installed and contracted load by CFE info, if not reject with the note:

“Faltan notas de carga instalada para saber si se considerarán costos extra de planeación”
6. Go to the Proposal Request section and check with the CFE bill
 - Check the consumptions, if they are not OK then identify the written VoBo of the customer for PP with estimated consumptions on the diablito check evidences, if there is nothing then reject with the note:

“Casa Nueva / Recibo nuevo / PP con consumos estimados. Seguir wiki y obtener confirmación escrita del cliente: https://docs.google.com/document/d/1WQTkcvACEcDTHxhJ5Te1HxRW-t8O8n6IE0ZxqAyfd_w/edit#bookmark=id.n4qgj4v9hxp0 ¿Me apoyarían a subirlo a DIABLITO NOTES EVIDENCES por fis?

- Check there is not a dead phase, but if is then reject with the note:

“Se detecta fase muerta en el recibo, se debe revisar en RTVR. Es necesario agendar VT para tomar lecturas con egauge y revisar si hay presencia de ilícito.

TODAS LAS CIUDADES:

Agendar la visita usando el siguiente link:

<https://thinkbright.tryretool.com/apps/Scheduling/Schedule>

Importante: Agregar la siguiente información en las notas del evento:

Dirección de la casa del cliente.

Permisos especiales para entrar (en caso necesario).

Razón de la visita.

Especificaciones especiales de la instalación eléctrica del cliente”

- Check that the **Zip code** it's OK, but if it's not the correct ZIP Code and there is no comments in NOTES of the EE then, reject with the note:
"CP con viáticos: Agregar confirmación del equipo de Idev que esta zona no cuenta con viáticos. ¿Me ayudarían a subirlo a la custom item de TRAVEL EXPENSE, por fa? "
- Check the bill is not **NETMET or PHOTOVOLTAIC**, but if it is and is no comments in NOTES of the EE then reject with this rejection note:
EE: Sistema con paneles ya instalados. Seguir wiki y obtener confirmación escrita del cliente.: https://docs.google.com/document/d/1WQTKcvACEcDTHxhJ5Te1HxRW-t8O8n6IE0ZxqAyfd_w/edit#bookmark=id.ye5xlrokgxg2 ¿Me apoyarían a subirlo a diablito notes evidences, por fis?
- Check there no comments of the EE on NOTES about a diablito, but if it is then reject with the note:
"Es necesario agendar VT después de que el cliente retire el diablito / para corroborar que ya no hay presencia de diablito y tomar lecturas correctas.
TODAS LAS CIUDADES:
Agendar la visita usando el siguiente link:
<https://thinkbright.tryretool.com/apps/Scheduling/Schedule>

Importante: Agregar la siguiente información en las notas del evento:

Dirección de la casa del cliente.

Permisos especiales para entrar (en caso necesario).

Razón de la visita.

Especificaciones especiales de la instalación eléctrica del cliente"

2. Create the following custom items in the lead page:
 - "Travel expense approval"
 - "Installed/Contracted load information"
 - "Estimated Consumption Confirmation"
3. If everything is OK then approve the Diablito Check

Template:

Aprobación manual de diablito:

Carga instalada subida (YES/NO)

PP realizada con los consumos del recibo (YES/NO)

Código postal correcto y sin viáticos o absorbidos por algún equipo (YES/NO)

Tarifa en engine correcta (DAC, 01, 1A, 1B, etc) (YES/NO)

Sistema con paneles ya instalados (YES/NO)

Tiene fase muerta (YES/NO)

Propuesta sobrepasa el 105% (YES/NO)

DAC Buffer arriba de parámetros (YES/NO)

Notas importantes o notes de special request:

New Houses, CFE Bills, and New Residency Approval Process and Consumption Estimation

We can approve a project that is new construction or was recently moved into and thus has CFE billing period in the last 12 months of \$0 in certain periods in the following scenarios and WITH written confirmation from the customer per [this standard](#):

- **CFE bill with ≥ 4 months of consumption data:** follow the process below (new construction process)
- **CFE contract generated but no consumption data:** follow the process below (new construction process) and we will be able to proceed as long as we have a CFE signed contract that allows us to verify the address, name in the contract and type of tariff. The contract must be submitted in the CFE bill section with the note that the CFE bill is being processed. The Approval Analyst will review the data with our standard CFE bill process.
- **There is no CFE bill or contract:** we can move forward but only with a purchase paid upfront (i.e. 1 year financial lease pay 100% upfront). Follow the process below (new construction process)

New Construction Process:

1. Size the **system is sized** using Bright calculator ([link here](#) and benchmarks [here](#)) which has the best practices for how to estimate consumption following best practices based on the various scenarios we encounter
2. The sign off on this amount is given by the client with written confirmation that this is an estimation and the real consumption could be higher or lower and may result in additional cost if the system size needs to change (more below on how to do so).
3. Have a **written confirmation from the customer** acknowledging that this size system assumes x kWhs per year consumption and if it turns out differently then they acknowledge their CFE bill will be higher and they may need additional solar at additional cost,

IMPORTANT: This written confirmation can be done via mail or whatsapp. Please **DO NOT** request a signature from the client, just a confirmation of the previous statement.

- Once the written confirmation is received, request to Approvals to add the “Consumptions Estimation Confirmation” item in the checklist to store it.

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