Oracle® Utilities Opower Affordability Savings Hub Cloud Service

Affordability Savings Hub Configuration Guide

Latest Release

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Getting Started

This guide is used during the Oracle Utilities Opower launch process to provide product design information, collect utility configuration preferences for the products being launched, and track the finalization of these preferences. The preferences are then used to set up your Oracle Utilities Opower products and platform.

> **Note**
>
> This HTML documentation is for reference only. Your Delivery Team will give you an editable PDF or DOCX version of the document to capture your inputs. Once submitted to Oracle Utilities, all utility inputs recorded in the configuration guides are final and cannot be modified. Ensure that all configuration inputs are accurate before submitting them.

Product Overview

The Oracle Utilities Opower Affordability Savings Hub Cloud Service helps customers understand and apply for financial assistance programs at their utility. The Savings Hub web features are designed to educate customers about the programs that they are eligible for, describe the benefits of program participation, and provide direct access to enrollment instructions and the tools needed to begin the enrollment process.

Disclaimers

Your utility might not have all of the products or features described in this document. Contact your Delivery Team if you have any questions.

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Design and Configuration

The Oracle Utilities Opower platform allows for product configurations and customizations to meet the needs of each utility. A *configuration* is a simple change that can be made with no coding required. There are required configurations and optional configurations. A *customization* is a change that requires more in-depth technical work, design, or coding to alter the appearance or behavior of the product, or to create something new within the product.

This guide only provides a summary of configuration options. Customization options may be available for your program at cost as an Oracle Utilities Opower professional service offering. Ask your Delivery Team how customization options could enhance your program.

If an element is not listed as a configuration, you should assume that it cannot be configured and would require a customization. Contact Your Delivery Team if you have questions about this process or would like to make a customization request.

In this chapter:

Savings Hub Pre-Survey

The Savings Hub Pre-Survey page welcomes customers to the Savings Hub experience, and tells them what they must do to get their personalized assistance program results.

The Savings Hub Pre-Survey page aims to make the customer aware that they could benefit from available assistance programs, and to entice them to take the survey.

Customers will get the Pre-Survey experience if they are accessing for the first time from a promotional banner or search of their utility's website (or if they previously started their survey but never completed it). However, if customers access the Savings Hub from a marketing module promotion in their Email Home Energy Report or Home Energy Report, then they bypass the Pre-Survey and are directed to the first question of the main Savings Hub Survey.

Continue as a Guest

Customers can take the survey and see its results without logging in by using the option **Continue as a guest**.

Design

The image below is an example of the Pre-Survey page.

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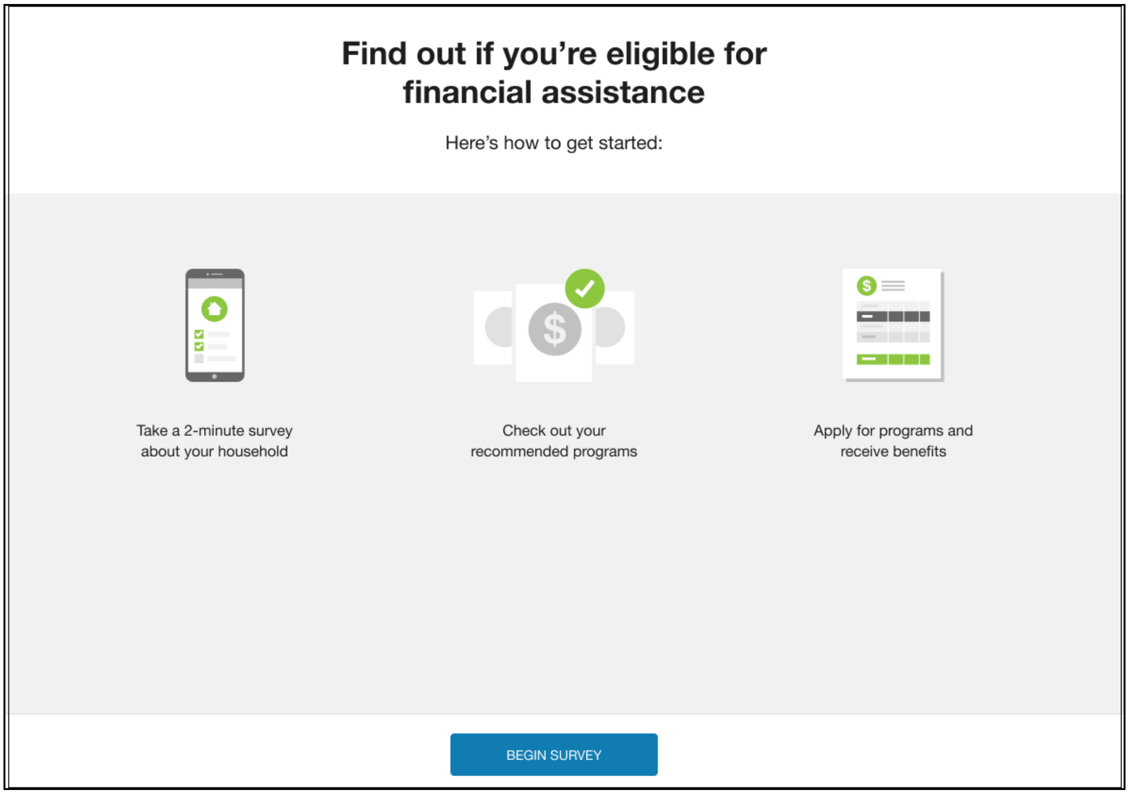

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Header The heading tells the customer that financial assistance is available. **Default:** Find out if you're eligible for financial assistance	**Optional** Choose one of the following: • Use the default. • Contact Your Delivery Team about customizing this element.
Subheader The subheader calls attention to how the customer can get started. **Default:** Here's how to get started:	**Optional** Choose one of the following: • Use the default. • Contact Your Delivery Team about customizing this element.
Getting-Started Steps Brief instructions that tell the customer what they need to do to get their survey results. **Default:** • Take a 2-minute survey about your household • Check out your recommended programs • Apply for programs and receive benefits	**Optional** Choose one of the following: • Use the default. • Contact Your Delivery Team about customizing this element.

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Configuration Option	Input Value
Survey Button The footer of the page includes a **Begin Survey** button that will redirect the customer to the Savings Hub Survey page. **Default:** Begin Survey	**Optional** Choose one of the following: • Use the default. • Contact Your Delivery Team about customizing this element.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Unstarted Survey

Customers who start the survey, leave, and return to it later will see an altered Pre-Survey screen with the following variations:

- **Survey Subheader**: The subheader encourages the customer to finish the survey.
- **Progress Indicator**: A progress indicator bar appears to show how many total questions are in the survey and how many questions have been answered.
- **Continue Button**: A **Continue Survey** button is located just below the progress indicator. When the customer clicks the button, they are redirected to the Savings Hub Survey page.
- **Getting-Started Steps**: The instructions for the survey are relocated to the bottom of the page in case the customer wishes to review the steps.

Savings Hub Survey

The Savings Hub Survey presents the customer with a series of questions about the customer's home and finances, and then uses the customer's answers to determine their eligibility for assistance programs.

A customer can follow several paths to reach the survey. The path taken depends on how the survey is promoted and the utility's setup and implementation. Below are some examples of common pathways.

- **Email Promotion**: If the customer accesses the Savings Hub from a marketing module promotion in their Email Home Energy Report or Home Energy Report, they bypass the Savings Hub Pre-Survey and are redirected to the first question of the Savings Hub Survey.
- **Web Portal**: If customers access the survey for the first time, or if they previously started their survey but never completed it, they are directed to the Affordability Survey after they complete the Savings Hub Pre-Survey.
- **Utility's Website**: If customers visit their utility's website, sign in to their account, and navigate to the survey by browsing the available links, they are directed to the Affordability Survey after they complete the Savings Hub Pre-Survey.
  Through the utility's website, customers can also have unauthenticated access to the Savings Hub page, where they get the option to either log in before taking the survey, or to take the survey without authenticating.
- **External Link (Unauthenticated Access)**: Customers can use an external link provided by their utility to access and complete their Savings Hub Survey without logging in. In such

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case, the results page prompts them to either log in, or continue viewing their results without authentication. If the customer logs in, they are redirected to a results page with a notification that confirms that the login was successful.

Design

The survey includes five required questions and one optional question:

- Do you rent or own your home?
- How many people live in your home?
- What programs are you currently enrolled in?
- What is your annual household income before taxes?
- Are there members of your household who fit in any of these categories?
- (Optional) Do any of these crisis situations currently apply to your household?

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Question 3: What programs are you currently enrolled in? Utilities must customize the listed programs to include a maximum of seven main programs and twelve "other programs." **Default:** N/A.	**Required** Contact Your Delivery Team about customizing this element.
Question 5: **Are there members of your household who fit in any of these categories?** The requirements to receive priority status or qualify for low income assistance programs vary from state to state. Utilities must work with their Delivery team to create a list of categories and customize the details text. **Default:** N/A.	**Required** Contact Your Delivery Team about customizing this element.
Question 6: Do any of these crisis situations currently apply to your household? Requirements to qualify for crisis funding varies by state. for low income assistance programs vary from state to state. Utilities must work with their Delivery team to create a list of qualifying crisis situations. **Default:** N/A.	**Required** Contact Your Delivery Team about customizing this element.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

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Data Retrieval Error

All elements on the page are data-dependent. If an error in this page results in a data retrieval failure, customers see a message telling them that something went wrong. The message encourages them to try again or refresh the page.

Last Question in the Survey

If there are only five questions in a survey, the **Next** button of the last question is replaced with a **Submit** button. Once the customer clicks **Submit**, they are directed to the Savings Hub Program Results page.

Savings Hub Program Results

The Savings Hub Program Results page educates customers about the assistance programs available to them based on their eligibility as determined by their survey responses and program participation data. The page includes a series of program cards that help build the customer's awareness of the breadth of programs available to them. The page only includes program cards for programs that the customer is eligible for.

Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Results Page Header Indicates that the page contains the customer's savings results. **Default:** Your Savings Hub	**Optional** Choose one of the following: • Use the default. • Contact Your Delivery Team about customizing this element.
Program Key Benefit A label that identifies the key benefit of the program to the customer in order to motivate them to enroll in the program. **Note**: This element must match what is configured in the Savings Hub Program Results page. **Default**: • One-time bill credit • Predictable bills • Ongoing bill discount • Emergency assistance • Improved insulation • Tax savings • Money back • Payment plan • One-time grant • No-cost appliance upgrades • Heating system repairs • Home energy audit	**Optional** • Use the default. • Contact Your Delivery Team about customizing this element.

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Configuration Option	Input Value
Program card - Bill Assistance Estimate or Rebate Amount Provides an estimated range of savings if the customer participates in the program. **Default**: $xx - $xx	**Required** Contact Your Delivery Team about customizing this element.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Targeting

Programs that the customer is already enrolled in or ineligible for will be hidden from the programs recommendations that appear in the Savings Hub results page.

Individual enrollment data for targeting is retrieved through the following:

- The Program Participation Files (PPF).
- The Customer Classification Files (CCF).
- The Savings Hub Survey results.

Program Card Key Benefits

The Program Card header highlights the key benefit that the program offers to the customer if they enroll in the program. Possible key benefits include:

- One-time bill credit
- Predictable bills
- Ongoing bill discount
- Emergency assistance
- Improved insulation
- Tax savings
- Money back
- Payment plan
- One-time grant
- No-cost appliance upgrades
- Heating system repairs
- Home energy audit

Savings Hub Program Details

The Savings Hub Program Details page provides customers with the opportunity to learn more about a particular assistance program highlighted in their Savings Hub Program Results page. The goal is to ensure that the customer receives all of the information they need to confirm their eligibility for a given program and to enroll in it successfully. Customers can access the

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program details for a specific program by clicking the **More Details** button located on each program card.

Design

This image shows an example of the Affordability Savings Hub Program Details page.

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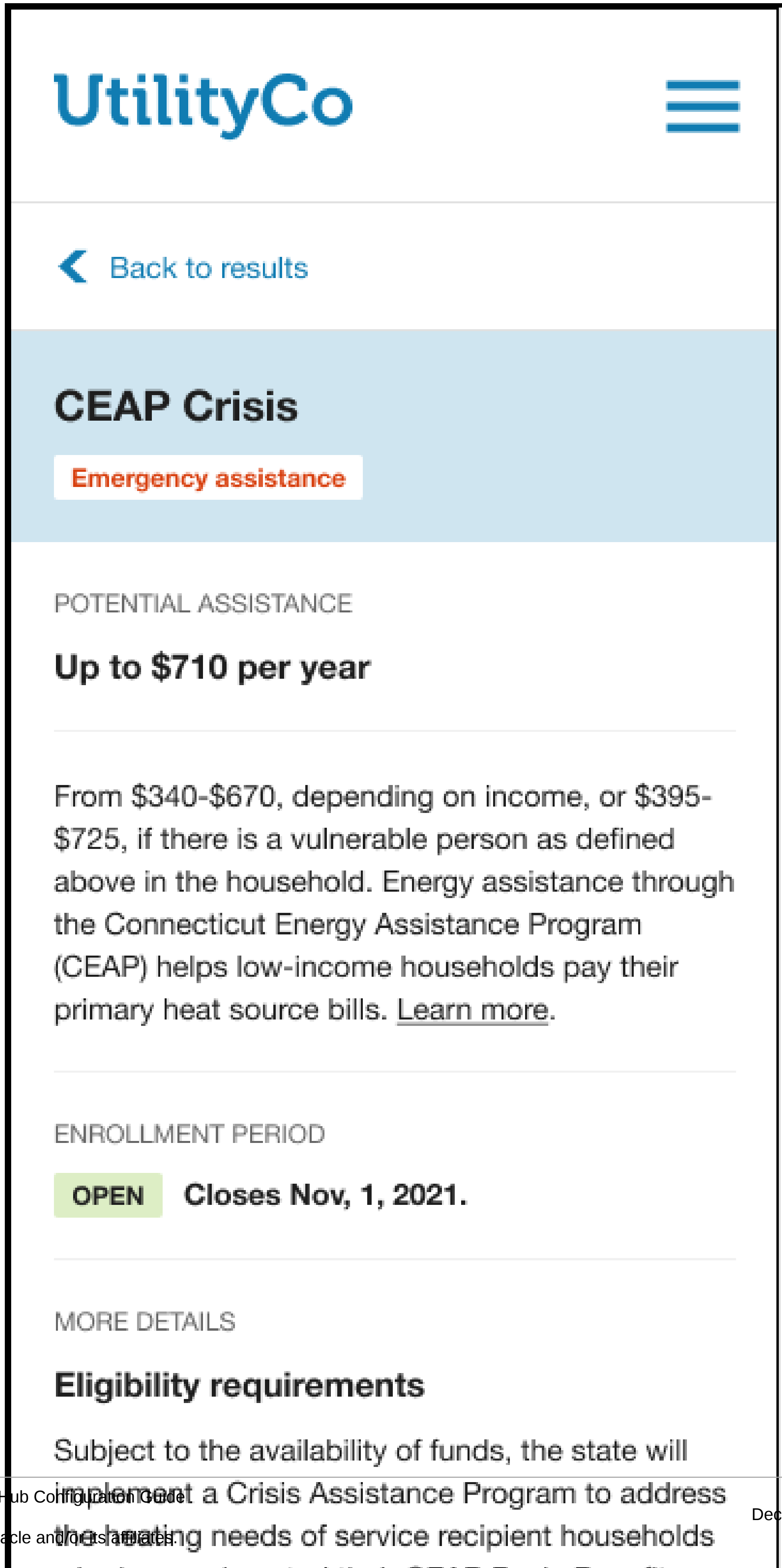

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Configuration Options

For each element listed in the table, indicate the desired configuration in the Input Value column. If you do not provide an input for optional configurations, the default will be used.

Configuration Option	Input Value
Program Name The name of the program the customer is eligible for. Program names must be provided by the utility. **Default:** N/A. **Note**: This element must match what is configured in the Savings Hub Program Results page.	**Required** Contact Your Delivery Team about customizing this element.
Program Key Benefit A label that identifies the key benefit of the program to the customer in order to motivate them to enroll in the program. **Note**: This element must match what is configured in the Savings Hub Program Results page. **Default**: • One-time bill credit • Predictable bills • Ongoing bill discount • Emergency assistance • Improved insulation • Tax savings • Money back • Payment plan • One-time grant • No-cost appliance upgrades • Heating system repairs • Home energy audit	**Optional** • Use the default. • Contact Your Delivery Team about customizing this element.
Program card - Bill Assistance Estimator or Rebate Amount Provides an estimated range of savings if the customer participates in the program. **Default**: $xx - $xx **Note**: This element must match what is configured in the Savings Hub Program Results page.	**Required** Contact Your Delivery Team about customizing this element.
How to Apply Header Instructions for eligible customers to apply to the program in-person, by mail, or online. **Default**: How to Apply	**Optional** • Use the default. • Contact Your Delivery Team about customizing this element.

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Configuration Option	Input Value
Required documentation Any additional documentation that must be supplied with the customer's application. **Default**: Possible documents may include one or more the following: • Your service disconnection notice or a letter from the utility company that states the service has been disconnected (if applicable) • Your most recent utility bills (or a copy) • A government-issued photo identification • Social Security cards for everyone in your home • Your government-issued identification • Proof of income for all household members • Social Security cards for everyone in your home • Your most recent utility bills (or a copy)	**Required** Contact Your Delivery Team about customizing this element.
FAQs Sub-header The FAQs section has a maximum of five frequently asked questions and their answers. **Default**: FREQUENTLY ASKED QUESTIONS	**Optional** • Use the default. • Contact Your Delivery Team about customizing this element.
FAQ headings and answers A maximum of five frequently asked questions and their answers can be added to the program details. FAQs do not repeat content that is elsewhere in the program card or program details. For example, How soon does the discount take effect? **Default**: N/A.	**Required** Contact Your Delivery Team about customizing this element.

User Experience Variations

The user experience varies for customers depending upon their service types, available data, costs, and locale. Note that the following list indicates the primary user experience variations, not all possible variations.

Recommended program

If the customer is viewing the program details for the program that was recommended on the Affordability Savings Hub Program Results page, a recommended header appears above the program header to remind the user that this is the best program for them as they review the program details.

Enrollment Closed

When a program is not currently accepting applications (closed), the enrollment information is marked as closed and the call-to-action button, **Apply Now**, is removed.

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3 Next Steps

After completing all required inputs in this configuration guide, complete the following next steps.

1. Complete any other product-specific configuration guides provided to you by your Service Delivery Manager.
2. Submit all configuration guides and required documents to your Service Delivery Manager as an email attachment. Be sure to include the following:
   - The Oracle Utilities Opower Platform Configuration Guide
   - Up-to-date HTML, CSS, and JavaScript files for your utility website
   - Utility branding guidelines
3. Update the Version table of this guide with your name, the date, and a descriptive comment. Complete this step using the PDF version of this guide.

> **Note**
>
> This HTML documentation is for reference only. Your Delivery Team will give you an editable PDF or DOCX version of the document to capture your inputs. Once submitted to Oracle Utilities, all utility inputs recorded in the configuration guides are final and cannot be modified. Ensure that all configuration inputs are accurate before submitting them.

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Contact Your Delivery Team

Your Oracle Delivery Team is the group responsible for setting up, configuring, launching, or expanding your Oracle Utilities Opower program. Contact your Delivery Team if you have any questions about your program products and implementation.

To contact your Delivery Team:

1. Sign in to Inside Opower (https://inside.opower.com). This is your portal for questions and information related to your program.
2. Go to the Community tab to see who is on your Delivery Team.
3. Contact any of the team members using the information provided.

If you need to report an issue or get technical support, contact My Oracle Support.

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