Welcome!

Thank you for joining SRP’s Demand Management Study. This Setup Guide provides an overview of the study and outlines steps to complete so you can manage your peak demand automatically, helping you to manage your monthly bill while minimizing the impact to your daily life.

Demand Management Study Overview

SRP is exploring a new demand management technology to help residential customers keep their electricity demand at manageable levels during on-peak hours. This is achieved by deferring the loads of major electric appliances, such as heating and cooling systems, which require significant power and can contribute to larger demand peaks.

For customers on the Customer Generation and Residential Demand Pilot Price Plans, managing demand peaks during on-peak hours is essential for lowering overall power consumption and managing electric bills.

To manage demand, each study participant will work closely with SRP to choose a peak demand target (i.e. 6 kilowatts). After the peak demand target is established in the Demand Management system, the system will monitor your home’s demand and control major electric appliances during on-peak hours. Appliances such as HVAC units (electric heating and cooling), electric water heaters, and electric dryers will automatically be turned on or off to help keep demand as close as possible to your selected peak demand target.

Steps to Complete

Following are steps to complete before using your new Demand Management System.

1. Equipment Installation
2. Learn about Your Smart Thermostat
3. Create Your Home Energy Manager Account
4. Manage Energy with the Home Energy Manager
5. Set Your Demand Threshold and Managed Device Priority
6. Download the Home Energy Manager Mobile App
7. Understand Managed Device Status
8. Get Answers to Your Questions

For immediate assistance with technical issues call (602) 236-2951 to receive 24/7 support. Otherwise please email demandmanagement@srpconnectedhome.com and we will respond during regular business hours, Monday through Friday, 7 a.m. to 7 p.m.
1. Equipment Installation Overview

During the installation process, an SRP-approved contractor will install a variety of equipment to support the Demand Management study.

Thermostat

A Radio Thermostat CT-32 with a Radio Wall Plate, known as a smart thermostat, will be installed on your wall. It will control the existing HVAC system, replacing your home’s current thermostat.

Load Controller Switch(s)

Load Control Switch(s) model # L530 will be installed for other large electric appliances included in the study. Load controllers measure the energy being used and enable the Demand Management System to control high energy use appliances such as electric water heaters or dryers to maintain your desired demand level.

Meter

In addition, if your existing meter is not compatible with the new equipment, a new compatible meter will be installed.
2. Learn About Your Smart Thermostat

Smart Thermostat Overview

Now that your installation is complete, it is time to learn about your smart thermostat. Let’s start with a quick tour of the thermostat to help you get acquainted with it:

1. During normal operation, the number displayed in the center of the screen is the current temperature in your home

2. The number displayed on the bottom left corner is your target temperature

3. Your device’s Fan Control is located at the top of the screen, toward the right. When the Fan Control is set to **Auto**, the fan will turn on only when the air conditioner or heater is running. When Fan Control is set to **On**, the fan is always running, even when the air conditioner or heater is not running.

4. The temperature adjustment arrows allow you to temporarily override your current programmed schedule to adjust your home’s target temperature

5. The Menu button is used to set items such as time of day and temperature display scale of Fahrenheit or Celsius

6. The Mode button sets the thermostat to **Heat**, **Cool**, **Auto**, or **Off** modes
Thermostat Features

- Use the touch-screen arrow keys to temporarily override the current target temperature or use the “Mode” button to temporarily change the cycle mode between Heat, Cool, Auto, or Off
  - All manual temperature adjustments and mode changes made at the wall thermostat are temporary and will be overridden by the program at the next scheduled transition point
- When a Demand Management Event is occurring; a green indicator light displays immediately below the “Save Energy” button
  - All manual temperature adjustments made at the wall thermostat when a Demand Management Event is occurring will cause the thermostat to opt out of the event for 30 minutes
- Important: Programs are not created at your wall thermostat; you will create programs through the Home Energy Manager (HEM) portal

Manual Temperature Adjustments to Your Smart Thermostat

Using the touch-screen arrow keys on the right side (4c), you can override a programmed schedule to adjust the target temperature in your home.

When adjusting, the target temperature (4a) is displayed in the center of the screen, and the current temperature (4b) is displayed on the bottom left.

After adjusting the target temperature, press the HOME button (4d) to return to the default display, showing the current temperature in the center of the screen.
3. Create Your Home Energy Manager Account

Next, you will create your Home Energy Management (HEM) account. The HEM account allows you to control your thermostat and managed devices from your computer.

Create Your HEM Account

Reminder: Call SRP Connected Home at (602) 236-2951 to assist you with the account setup process.

1. Open a web browser on your computer and go to the website SRPHEM.Consert.com
2. In the New Users Online Setup section, click the Setup Now button

3. On the screen titled Step 1 of 3: Look up Your SRP Account, complete the following items:
   - Enter your SRP Account Number (with dashes)
     - Your SRP account number is located on your monthly billing statement
   - Enter your address house number as it appears on your SRP bill
   - Enter your billing zip code
   - Type the text in the Captcha™ image
   - Click the Find Account button
4. On the screen titled **Step 2 of 3: Verify Your Information**, review the information associated with the account. If the information is correct, click the **Save and Continue** button.

![Step 2 of 3: Verify Your Information](image)

5. On the screen titled **Step 3 of 3: Create a Username and Password**, complete the following items:
   - Enter your email address
   - Create a user name and password (used to log into the account)
   - Create a Secret Question and Answer (used to reset your password should you forget your original password)
   - Click the **Save and Continue** button

![Step 3 of 3: Create a Username and Password](image)
6. Next, the Account Confirmation page is displayed. You may print the information for your records. When you are ready, click the Continue button.

7. The Terms of Use page is displayed next. Review the terms of use. If you agree with the terms, click the Agree and Continue button to finalize the account setup process.
4. Manage Energy with the Home Energy Manager

The Home Energy Manager (HEM) online portal is used to manage some of your high use appliances such as HVAC, water heater or dryer. From the HEM home page, select the menu options in the Main Menu sidebar to navigate to various system pages. Menu options include the following:

- **Home:**
  - View energy usage charts
  - View current program information
  - View device settings

- **Programs:**
  - View and edit SRP’s standard programs
  - Create and edit your own recurring or specific day programs
  - Temporarily override or permanently hold target temperatures
  - Remotely change program schedules

- **Demand Manager:**
  - Create and edit peak demand targets
  - Create and edit the order in which managed devices are turned on or off during on peak hours
  - View current, point in time demand data
  - Make a temporary override to your thermostat or managed device
    - *Remember:* Temporary overrides can impact your monthly bill

- **Help:**
  - Search content and learn about system functionality

**Program Management**

To streamline the Demand Management setup process, SRP has created a set of standard energy management programs that are available for your immediate use.

View the chart below for details of the SRP energy management programs.
Modify a Recurring Program

While participating in the Demand Management study, you can easily modify the SRP standard programs to meet your energy conservation goals or improve the comfort of your home. Examples of typical modifications include:

- Revising the program months
- Revising the program days
- Modifying the time or temperature associated with a program’s transition point (a time setting in the program that triggers a change in the operation of your controlled devices)

In the below step-by-step instructions, SRP’s Cooling Weekday program is revised to remove the months of July and August so that a new Summer Peak recurring program can be created for the months of July and August.

1. Open a web browser on your computer and log into your account at the following URL: [SRPHEM.Consert.com](http://SRPHEM.Consert.com)
2. From the Home page, click either the Programs menu item or the Manage Programs button.

3. In the My Programs section of the Program Management page, click on the program to be edited. In this example, the Cooling Weekday program was selected.
• To prepare for the creation of a new Summer Peak program, deselect July and August by clicking on the months displayed in the Select Month(s) section of the screen
  
  *Reminder:* Recurring programs can’t share the same months and days

  • When the system identifies an overlap, you will receive the error message “You already have a program scheduled for that month/day,” followed by the name of the program that includes the conflict

  • You must eliminate the conflict before your edits can be saved

4. Click the **Save Programs** button

  *Important:* Wait until the screen refreshes before making further changes!

**Create a Recurring Program**

You can create an unlimited number of recurring programs to achieve your energy conservation goals. Tips for creating recurring programs include:

  • Create separate heating and cooling programs that do not use the Auto mode
    • Separate programs eliminate the use of certain appliances during warm or cool seasons
  
  • Create only one transition point for your heating and cooling programs
  
  • Create only one transition point for water heaters and dryers and set to “On” during the study

  • Do not overlap months and days in multiple recurring programs
    • *Example:* The **Cooling Weekday** program can not include the same months as a newly created program for the summer peak period of July and August

In the below step-by-step instructions, a recurring program for **Summer Peak** is created.

*Reminder:* Call SRP Connected Home at **(602) 236-2951** to assist you with program setup.

1. From the **Home** page, click either the **Programs** menu item or the **Manage Programs** button.
2. In the **My Programs** section of the Program Management page, click the +Add Program button.

3. A pop-up window titled Add Program is displayed. Type the name of your new program in the data entry field and click the OK button.
   - *Example:* Summer Peak

4. Your new program is added to the **My Programs** section of the screen.

5. Click on the **Recurring** tab and select the months and days applicable to your program.
   - *Example:* Months = July - August
   - *Example:* Days = Monday – Friday

6. Next, review the right side of the Program Management screen. Your managed devices are displayed here. You will set transition points for each device.
- **Note:** A transition point is a time setting in the program that triggers a change in the operation of your equipment.

7. Click the **Add Transition Point** button to create transition points for each managed devices. Transition settings vary per managed device. Please review the chart below to determine the required entries per managed device.

<table>
<thead>
<tr>
<th>Transition Setting</th>
<th>Device Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Thermostats</td>
</tr>
<tr>
<td>Transition Time</td>
<td>Required</td>
</tr>
<tr>
<td></td>
<td>You may add up to seven transition points per device</td>
</tr>
<tr>
<td>Target Temperature</td>
<td>Required</td>
</tr>
<tr>
<td>Mode</td>
<td>Required</td>
</tr>
<tr>
<td></td>
<td>Modes = Cool, Heat, Auto, Off</td>
</tr>
<tr>
<td></td>
<td>Reminder: Select ON for water heaters and dryers included in the study</td>
</tr>
</tbody>
</table>

8. To adjust the transition time, click the time field and move the sliders to the desired time. To save your changes, click the **Save** button.
   - **Example:** Set time to 1:00 PM
   - **Hint:** If you have difficulty moving the sliders with your mouse, click anywhere on the slider bar and use the arrow keys to manually adjust the slider.

9. To adjust the temperature, click the temperature field and move the slider to the desired temperature. To save your changes, click the **Save** button.
   - **Example:** Adjust temperature to 86°F
10. To adjust the mode, click the mode until the desired setting is displayed
   - *Example: Select Cool*

11. Continue to add transition points for all your device to minimize energy use during on-peak hours.
   You may add up to seven transition points per device.

12. After all transition points have been added for the program, click the **Save Programs** button.
    *Important:* Wait until the screen refreshes before making further changes!

13. You have successfully created a recurring program! Continue to create recurring programs to
    achieve your demand management goals. You can add an unlimited number of programs.

14. To return to the **Home** page, click the **Menu** icon and select **Home**
Create a Specific Days Program

A Specific Days program overrides the normally scheduled recurring program. Specific Days programs are useful when planning for vacations, working from home, or any situation that requires a temporary change to your regular scheduled programs.

Follow the steps below to create a Specific Days Program.

1. From the Home page, click the Manage Programs button

2. In the My Programs section, click the +Add Program button

3. A pop-up window titled Add Program is displayed. Type the name of your new program in the data entry field and click the OK button.
   a. Example: Vacation

4. Click on the Specific Days tab and then click the +Dates or Range button. Use the pop up calendar to select the date range for your program.
   b. Example: 10/20/2017 – 10/26/2017
5. Review the right side of the Program Management screen where your managed devices are displayed. Click the **Add Transition Point** button for one of your managed devices.
   - **Example:** Click the **Add Transition Point** button for a thermostat
c. You may add up to seven transition points per managed device

![Image of Program Management screen]

6. To adjust the transition time, click the time field and move the sliders to the desired time. To save your changes, click the **Save** button.
   - **Example:** Set time to 8:00 AM
   - **Hint:** If you have difficulty moving the sliders with your mouse, click anywhere on the slider bar and use the arrow keys to manually adjust the slider

![Image of time slider]

7. To adjust the temperature, click the temperature field and move the slider to the desired temperature. To save your changes, click the **Save** button.
   - **Example:** Adjust temperature to 82°

![Image of temperature slider]

8. To adjust the mode, click the mode until the desired setting is displayed
   - **Example:** Select Cool

![Image of temperature slider]

9. Continue to add transition points for all your device to minimize energy use during on-peak hours. You may add up to seven transition points per device.

10. After all transition points have been added for the program, click the **Save Programs** button. **Important:** Wait until the screen refreshes before making further changes!

**Schedule a Specific Days Program**

When you need to override your recurring program with a Specific Days program, you can change programs quickly through the Home page.

Follow the steps below to change programs.

1. From the **Home** page, click the **Change Programs** button. Select the desired program from the displayed list.
   - **Example:** Vacation
2. After selecting the program, a pop-up window titled **Change Program** is displayed. In the **Change Program** window, select the duration of the change.

![Change Program](image)

3. Next, click the **OK** button in the pop-up message to confirm your selection. The Specific Days program is now scheduled and will override your normally scheduled programs for the selected dates.

5. **Set Demand Threshold and Managed Device Priority**

During initial installation, SRP’s Connected Home Team will contact you to review and create your initial demand target and managed device priority.

Over time or with seasonal changes, you may determine that revisions are needed. You can quickly revise your demand target and device priority through the HEM online portal.

Follow the steps below to revise your demand target in the HEM online portal.

1. From the **Home** page, click the **Demand Manager** menu option. The **Home Demand Management** page is displayed.

2. In the field titled **Set Demand Target**, enter your desired demand target (kilowatts).

3. Click the **Save** button.
To revise your managed device priority in the HEM online portal, follow the steps below.

1. From the Home page, click the Demand Manager menu option. The Home Demand Management page is displayed.

2. In the section of the screen titled Set Priority, click the Move Up or Move Down buttons located in the Actions column to re-order your managed devices to the desired priority order.

3. Click the Save button.

To temporarily override the Demand Management system and return controlled devices to normal operating status, follow the steps below.

1. From the Home page, click the Demand Manager menu option. The Home Demand Management page is displayed.

2. In the section of the screen titled Set Priority, click the Opt Out buttons located in the Opt Out column to return your in-control devices to normal operating status.

3. Click the Save button.
6. Download the Home Energy Manager Mobile App

With the HEM mobile app, you can monitor and adjust your thermostats from any Apple or Android phone or tablet. You can also create recurring and specific day programs to achieve your energy management goals. To download the app, click the appropriate link below.

- Google Play® App:
  - Compatible with Android devices

- Apple™ app (iTunes®):
  - Compatible with iPhone, iPad, and iPod touch

Mobile App Features

- Create and edit recurring or specific day programs
- Remotely change program schedules
- Use the touch-screen arrow keys to temporarily override the current target temperature
- Use the Mode button to change the cycle mode between Heat, Cool, Auto, or Off
- Turn on or off electric appliances included in the study
- Monitor energy usage of your managed devices

Follow the instructions below to log into the mobile app and navigate through available screens.

1. At the login screen, press the Tap to Select button and choose Salt River Project from the list.
2. Enter the same Username and Password used to sign into your HEM account and press the Submit button.

![Image of the HEM user interface showing the login screen.]

3. Review the Current Settings page to monitor the current settings of your managed devices. The page displays the current target temperature for your devices, the current program running, and the name of the next scheduled program with start date.

![Image of the HEM user interface showing the Current Settings page.]

4. While on the Current Settings page, rotate your mobile device to landscape mode to view a graph with details of usage. To return to the previous screen, simply rotate your device back to portrait mode.

![Graph showing usage details.](image)

5. Press the Control icon in the lower portion of the screen to view your thermostats and other devices.
   - To see multiple devices, swipe right or left
   - Press the Refresh button to bring forward the most current data
   - Modify settings for all your managed devices through this screen
     - Changes made are temporary and will be overridden at the next transition point

![Thermostat control screen.](image)

6. Press the Options icon to verify that the temperature units are set to Fahrenheit.

![Options screen showing temperature unit.](image)
7. Press the **Account** icon to display your account data. You can also log out of the mobile app on this screen.

![Account icon](image1)

Modify Standard Recurring Programs

Similar to the online HEM, you can modify the standard recurring programs in the mobile app to achieve your energy conservation goals. Examples of modifications include:

- Modify selected months and days of default programs
- Modify existing transition points

In the below example, a standard recurring program is revised to deselect the months of March and April so that a new recurring program can be created for those months.
1. From the Current tab, press the **Programs** button in the upper left corner of the screen and then select the program to be edited.

2. After selecting the program, select the months and/or days that must be removed from the program. In this example, the new program will run in March and April on Mondays and Wednesdays only.
   - Deselect March and April
   - Deselect Monday and Wednesday

3. Press the **Save** button
Create a Recurring Program with the Mobile App

With the mobile app, you can create recurring programs to help you achieve your energy conservation goals. Tips for creating recurring programs include:

- Create separate heating and cooling programs that do not use the Auto mode
  - Separate programs eliminate the use of certain appliances during warm or cool seasons
- Create only one transition point for your heating and cooling programs
- Create only one transition point for water heaters and dryers and set to “On” during the study
- Do not overlap months and days in multiple recurring programs
  - Example: The default Cooling Weekday program can not include the same months as a newly created program for the summer peak period of July and August
  - When the system identifies an overlap, the error message “You already have a program scheduled for that month/day” is displayed, followed by the name of the program that includes the conflict

Follow the steps below to create a recurring program with the mobile app.

1. From the Current Settings page, press the Programs button
2. A list of your programs is displayed. Press the + New Program button.

3. The Edit Program screen is displayed. Complete the following steps.
   - Enter the name of the program in the Name field
   - On the Recurring tab, select the months and days when the program should run
   - Press the Edit Transitions button

4. A list of managed devices is displayed. Complete the steps below to add at least one transition point for each managed device.
   a) Press the Add Transition Point button for the managed device
   b) For thermostats, select the temperature, operating times, and mode (Cool, Heat, Auto, or Off) and then press the Save button
   c) For other managed devices such as water heaters or dryers, set the mode (on or off) and operating times and then press the Save button
Create a Specific Days Program with the Mobile App

1. On the Current Settings screen, press the Programs button.

2. A list of your programs is displayed. Press the + New Program button.

3. The Edit Program screen is displayed. Complete the following steps.
   a) Enter the name of the Specific Days program in the Name field.
   b) On the Dates Range(s) tab, press the + Add Date Range button.
   c) In the From section, press to view a pop-up calendar and select the start date for the program.
   d) In the To section, select the end date for the program.
   e) Repeat steps 4c and 4d to add more start and end dates to your program.
   f) After dates are selected, press the Edit Transitions button.
4. A list of managed devices is displayed. Add at least one transition point for each managed device.

5. After transition points are created, press the **Save Programs** button.

7. Understand Managed Device Status

Determine Managed Device Status

The Demand Management system turns off your managed devices during on-peak hours when the system forecasts that your usage will exceed your demand target. When you temporarily override the system by returning your managed devices to normal operating status, *your usage may exceed your demand target and potentially impact your monthly bill*.

Wall Thermostat:

To determine if your HVAC system is under control of the Demand Management system, look at your wall thermostat. A flashing green indicator light is displayed immediately below the “**Save Energy**” button.

HEM Online Portal:

You can easily view the status of all your managed devices in the **Set Priority** section of the online portal’s **Home Demand Management** page. Devices with a status of In-control are being controlled by the Demand Management system.

HEM Mobile App:

To determine if your managed devices are under control, look at the status of the managed device on your mobile app. The status will indicate “OFF”.

![Wall Thermostat Image]

![HEM Online Portal Image]

![HEM Mobile App Image]
Process to Temporarily Override the Demand Management System

Short Term Override

When the Demand Management system is causing discomfort or inconvenience, you may temporarily override the system by making temporary adjustments to your managed devices.

Temporary adjustments to temperature can be made at the wall thermostat or through your HEM on-line account or mobile app.

Managed devices such as your water heater or dryer can be temporarily turned back on through your HEM on-line account or mobile app.

Because the Demand Management system monitors demand levels in 30 minute increments, the override only lasts until the next 30 minute period is reached. If demand levels are still high, the system will once again turn off equipment to reduce demand.

Changes to Your Peak Demand Level

As seasons change, your demand for energy may also change. If Demand Management Events are occurring routinely and your home is uncomfortable, perhaps your peak demand level has been set too low. Follow the steps in Section 5 of this document to change your demand target.

8. Get Answers to Your Questions

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For more information about the study, please check Srpnet.com/DMStudyHEM.