

# User Manual for State Designated Agency (SDA)

PATNET Portal

Version 1.3





## Table of Contents

1. About this Document .....	3
Intended Audience .....	3
2. New SDA Registration Process .....	3
3. Initial Login Process .....	7
4. Forgot User ID? .....	10
5. Forgot Password? .....	12
6. Reset Login Details for SDA .....	15
7. SDA Profile Update by the Nodal Officer .....	19
8. Review and Provide Comments on Form 1 .....	21
9. Review and Provide Comments on Form A .....	23
10. Review and Provide Comments on Form B .....	27
11. Review and Provide Comments on Form C .....	31
12. Review and Provide Comments on Form D .....	35
13. Review and Provide Comments on Form 2 .....	39
14. Review and Provide Comments on Form 3 .....	43
15. Reversal of comments by Nodal Officer .....	48
16. Updation of Comments by Technical Officer as suggested by Nodal Officer .....	50



## 1. About this Document

The purpose of this document is to fully describe how the users of **State Designated Agency (SDA)** can use the PAT NET Portal.

### Intended Audience

This document is intended for the following list of users:

#### PATNet Portal Users

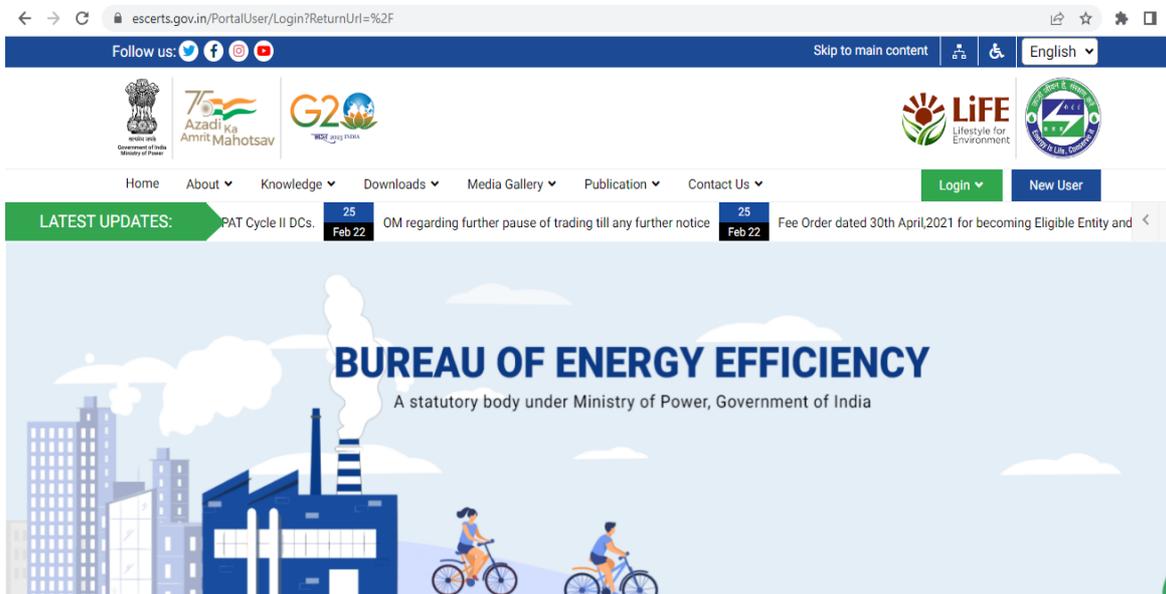
##### State Designated Agency

- **Technical Officer - TO**
- **Nodal Officer - NO**

## 2. New SDA Registration Process

This section explains the registration process for a new State Designated Agency users with the PAT NET portal. Below are the step-by-step information on the activities to perform this operation.

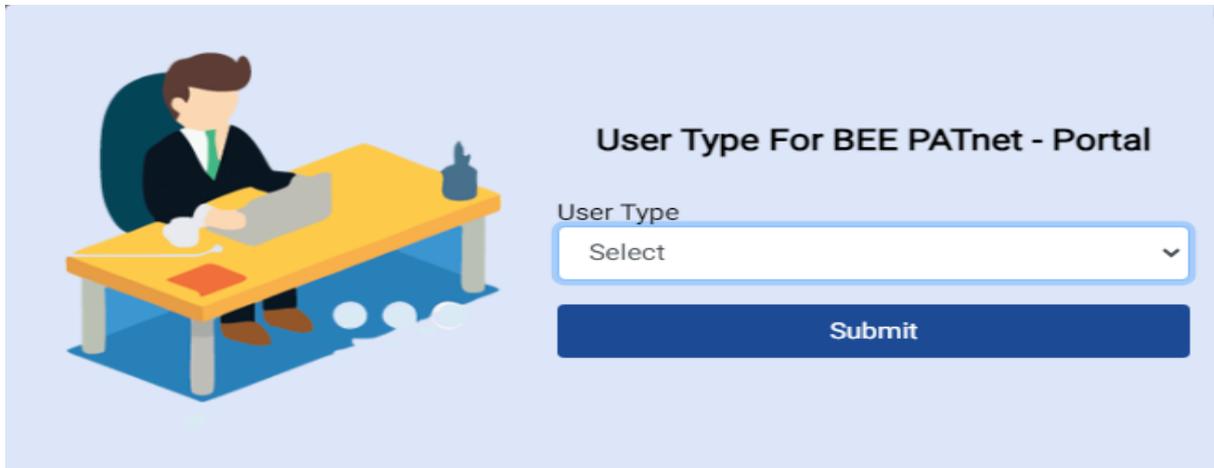
1. Open e-filing portal (<https://escerts.gov.in>).  
(The 'BEE PATNET portal Login' page appears).
2. Click on **New User** button on the login page as shown in below image.



**Figure 1: Login Link Page**



- The system redirects the user to select **User Type** page. Select **SDA** from the User Type drop-down and then click on **Submit** button.



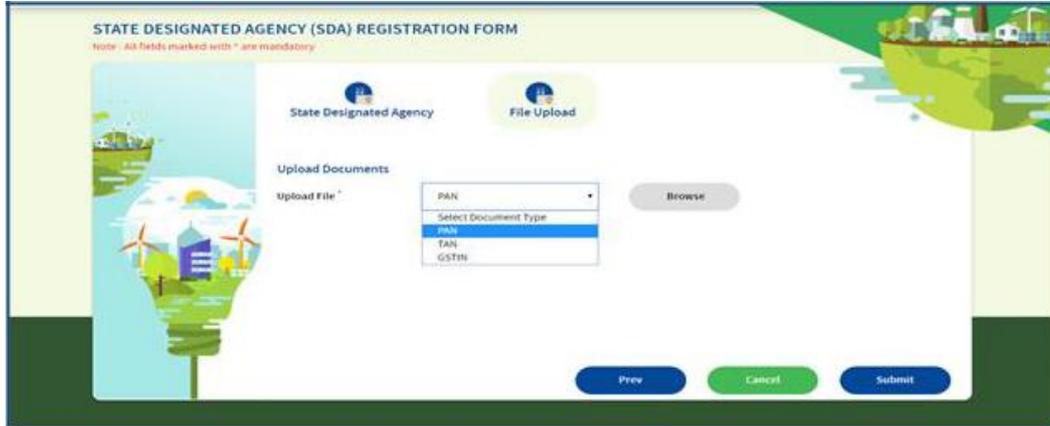
**Figure 2: User Type selection**

- The **State Designated Agency (SDA) Registration** section appears as shown in below image, perform the following action:
  - Select the **State** name from the drop-down to auto populate the **SDA name**, **Recovery email Id** and **Address line** details.
  - Enter the **Technical Officer Details**.
  - Enter the **Nodal Officer Details**.Click on **Next** button.

**Figure 3: SDA Registration Page**

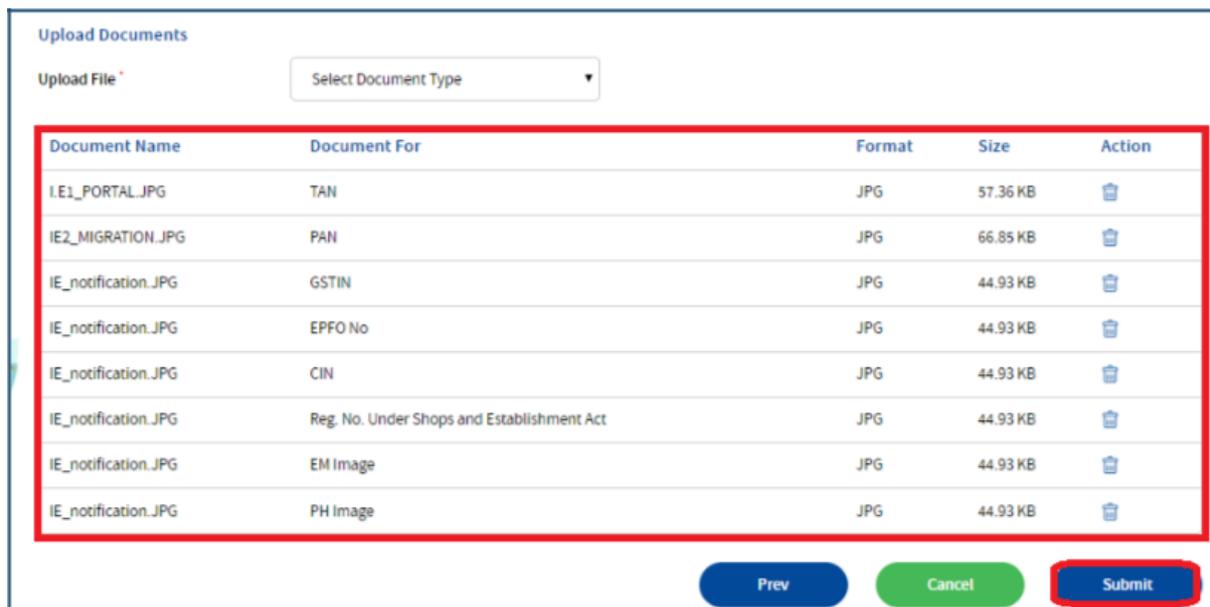


1. In the **File Upload** section, under **Upload File** field, select the file name from the drop-down to upload a file. Click on the **Browse** button to browse and select a specified file from your system.



**Figure 4: File Upload Section**

2. The selected file will be added to the list under **Upload Documents** section as shown below. Click on **Submit** button.



**Figure 5: Document List**

3. The confirmation pop-up message appears, click on the **OK** button to proceed.



**Figure 6: Confirm Proceed Message**

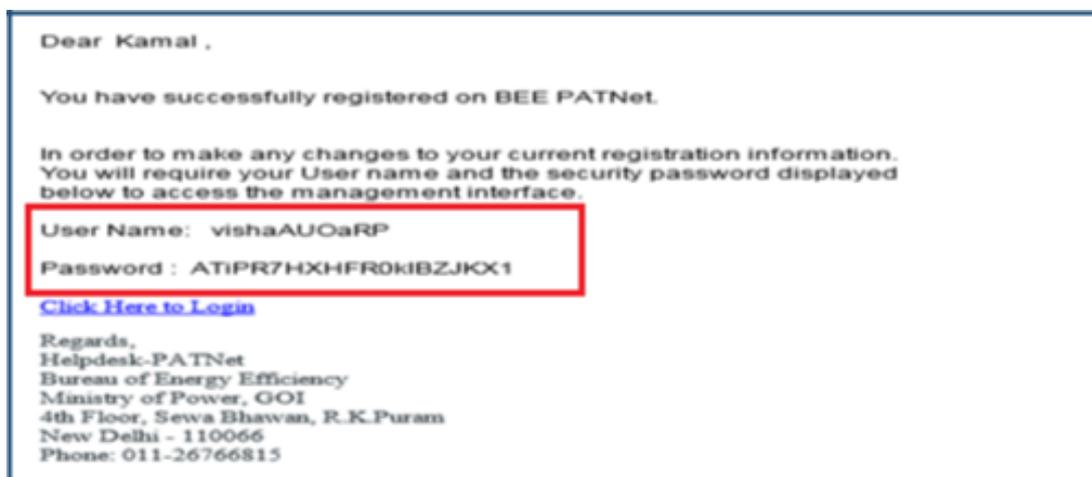
- The message **Successfully Registered** appears on the page and that indicates successful registration process for SDA as shown in below image.



**Figure 7: Successful Registration Message**

**Notes:**

- Mandatory fields to fill are marked with (\*) mark.**
  - The SDA Record will be assigned to 'SDA Head'.**
- After completion of registration, SDA user will receive login credentials in his/her official email Id as shown in below image.



**Figure 8: Registration completion email with login credentials**



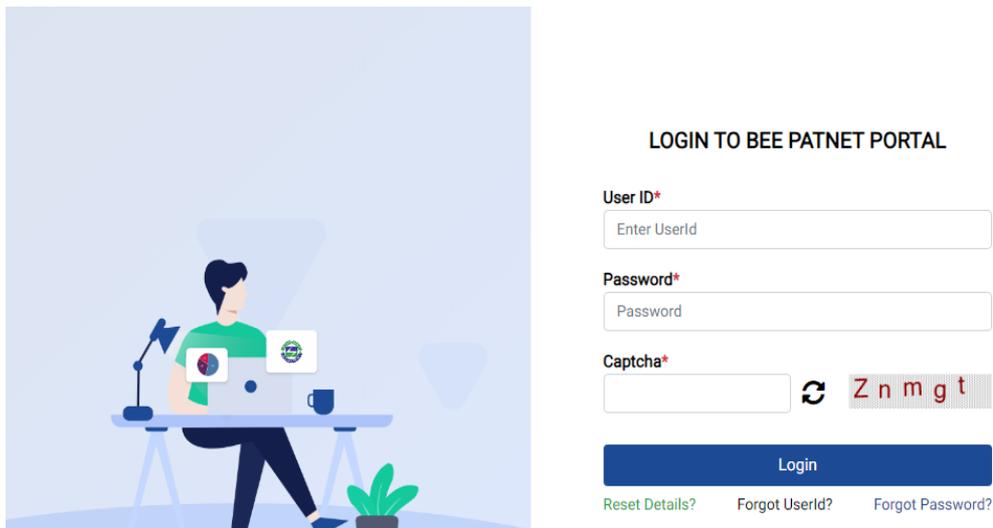
### 3. Initial Login Process

This section explains the first time log in process of SDA.

1. Open e-filing portal by clicking the link (<https://escerts.gov.in>). (The 'BEE PATNET portal Login' page appears).
2. Enter the **User ID** and **Password** which is received via email, enter the **Captcha** and then click on **Login** button as shown in below image.



**Figure 9: Login Link Page**



**Figure 9.1: Login Page**

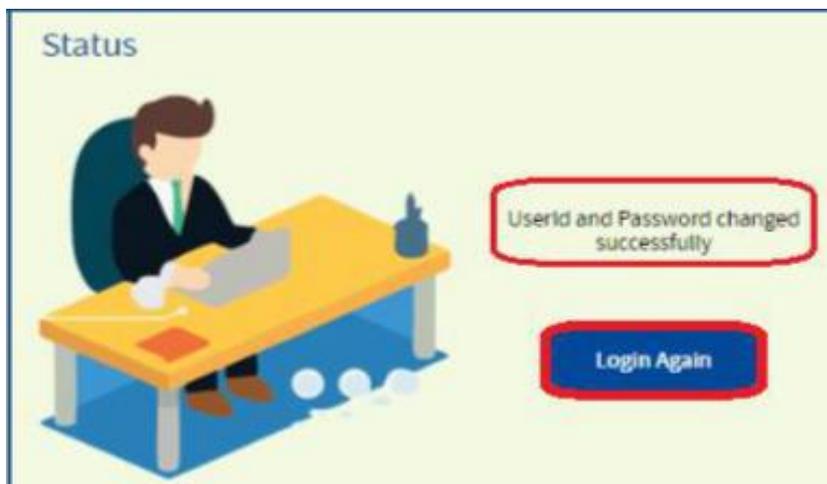


3. After successful login, **Change Credentials** page appears and user has to enter the new **User ID**, Enter the new **Password**, **Confirm Password** and then click on **Submit** button as shown in below image.

A screenshot of the 'Change Credentials' web form. The form has a light green header with the title 'Change Credentials'. On the left, there is a decorative illustration of a green landscape with wind turbines and a sun. The main form area contains three input fields: 'New UserId \*', 'New Password \*', and 'Confirm Password \*'. A red rectangular box highlights these three input fields. Below the input fields is a blue 'Submit' button with a red border.

**Figure 10: Change Initial User Id and Password**

4. Success window appears as shown in below image. Click on **Login Again** button.



**Figure 11: Password Change Success Message**



5. Login page will be displayed again, enter the **new User Id** and **new Password**, enter the **Captcha** and then click on **Login** button.

LOGIN TO BEE PATNET PORTAL

User ID\*  
Enter UserId

Password\*  
Password

Captcha\*  
Z n m g t

Login

[Reset Details?](#) [Forgot UserId?](#) [Forgot Password?](#)

**Figure 12: Login Page**

6. 'One Time Password' page will be displayed. User has to enter the **OTP** received on his/her registered mobile number and click on **Submit** button as shown in below image.

One Time Password

One Time Password\*

Re-Send OTP

Submit

**Figure 13: One Time Password Page**

**Note:** If SDA is not receiving the OTP on the registered mobile number then click on **Re-Send OTP** button to receive the new OTP.

One Time Password

One Time Password\*

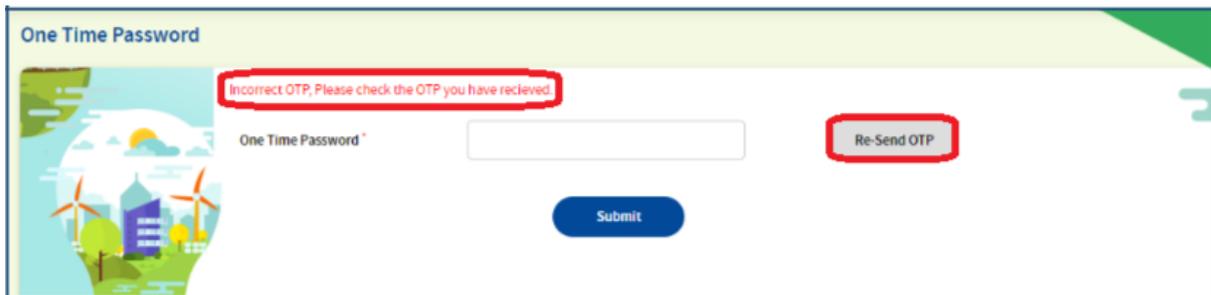
Re-Send OTP

Submit



**Figure 14: Re-Send OTP Button**

7. If the entered OTP is wrong, an error message will show as shown below. Click on **Re-Send OTP** to receive a new OTP.



**Figure 15: Incorrect OTP Message**

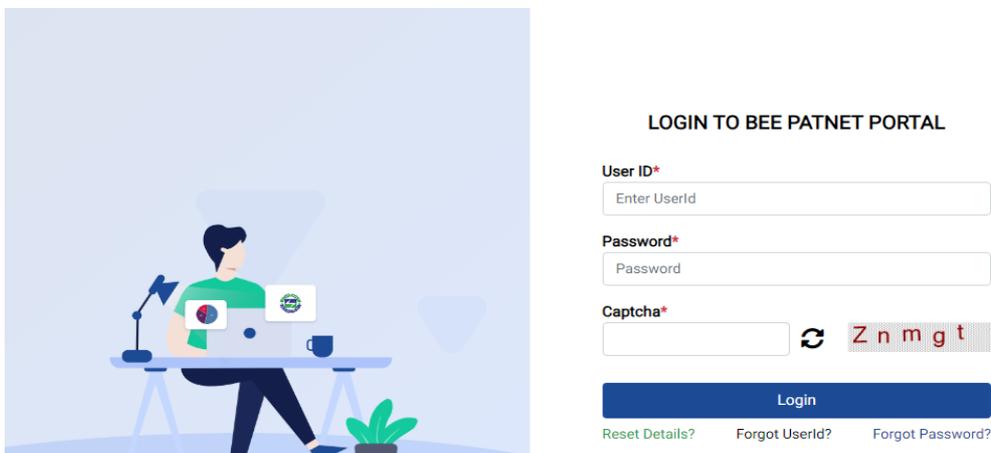
## 4. Forgot User ID?

This section explains the step-by-step procedure for **SDA** users to reset their login user ID in case they forgot the user ID.

**Note:** *Forgot User ID feature can be used in case if the user remembers the registered email address.*

Below given is the detailed steps to perform this operation from the PATNET portal.

1. Open e-filing portal by clicking the link (<https://escerts.gov.in>).  
(The 'BEE PATNET portal Login' page appears).
2. Click on **Forgot User ID** link which is present in the login page as shown in below image.



**Figure 16: Forgot User ID**



- The system navigates to **Forgot User ID** page. Enter the **Email Id**, enter the **Captcha** and then click the **Submit** button.

Forgot User ID?

Enter your email ID\*

Captcha\*

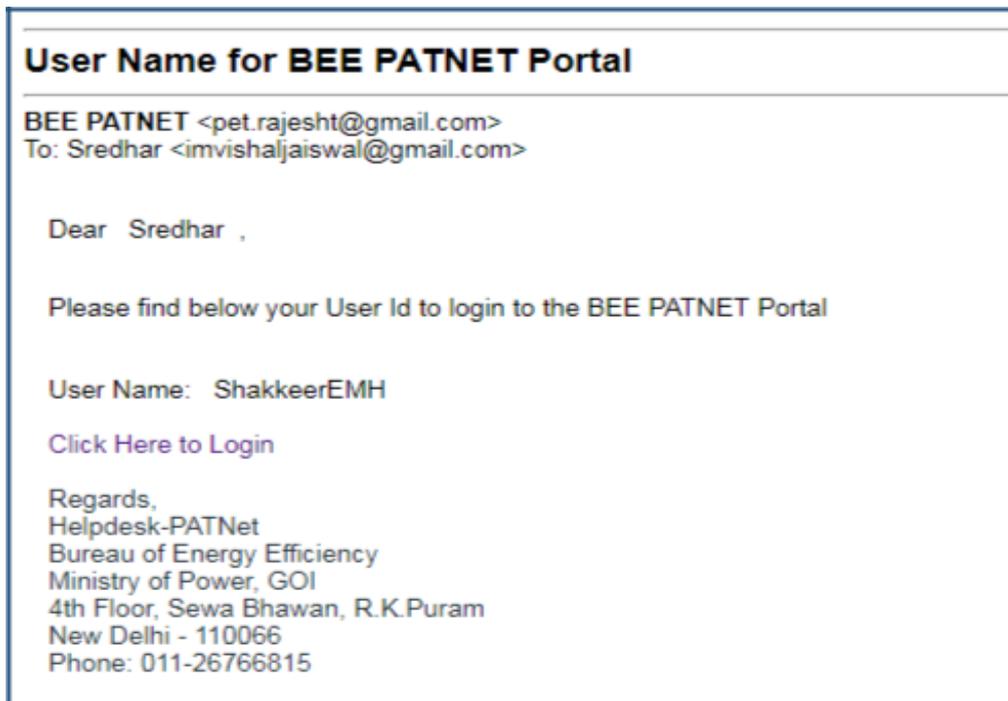
Enter Captcha

D 6 b G f

Submit

**Figure 17: Forgot User ID Field**

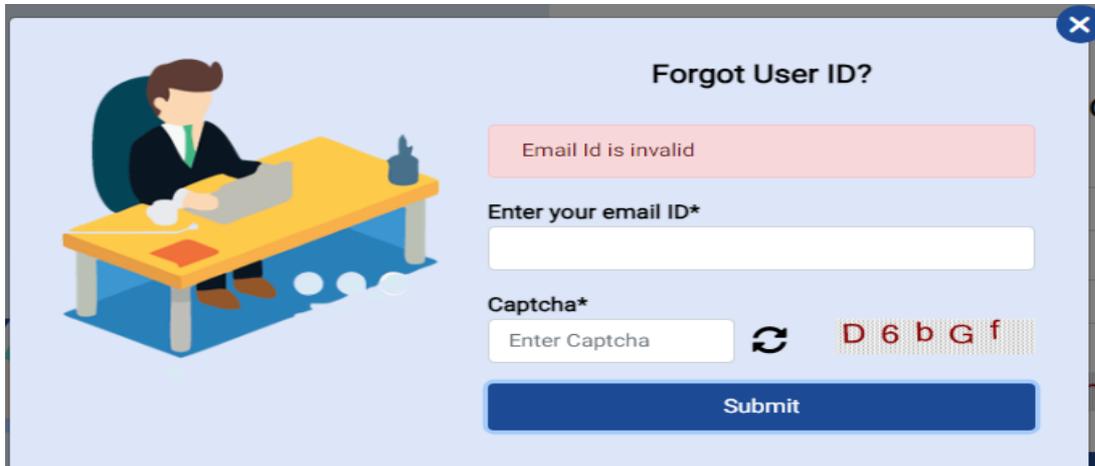
- After successful submission, the system will redirect user to success page and User ID will be sent to the registered email ID of user as shown- "The UserID has been sent to your registered mail" in below image.



**Figure 19: Email with User ID**



**Note:** If the user enters wrong Email ID and clicks on Submit button then the system will show Invalid Email ID message as shown in below image.



**Figure 20: Invalid Email Id Message**

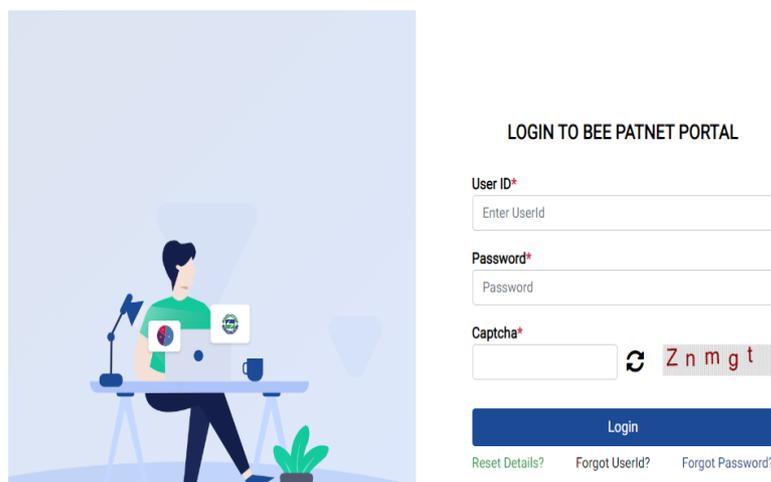
## 5. Forgot Password?

This section explains the step by step procedure for SDA to reset their login password.

**Note:** *Forgot password feature can be used in case if the user remembers the login ID.*

Below given are the detailed steps to perform this operation from the PATNET portal.

1. Open e-filing portal by clicking the link (<https://escerts.gov.in>).  
(The 'BEE PATNET portal Login' page appears).
2. Click on **Forgot Password** link which is present in the login page as shown in below image.



**Figure 21: Forgot Password**



3. The **Forgot Password** window appears in the system. Enter the **User Id**, enter the **Captcha** and then click the **Submit** button.

A screenshot of a web form titled "Forgot Password?". On the left, there is an illustration of a man in a suit sitting at a desk with a laptop. The form itself has a light blue background and contains the following elements: a title "Forgot Password?", a label "Enter your user Id\*" above a white text input field, a label "Captcha\*" above another white text input field, a refresh icon (a circular arrow) to the right of the captcha field, and a captcha image showing the characters "D 6 b G f". Below these fields is a blue "Submit" button. A close button (an 'X' in a blue square) is located in the top right corner of the form's border.

**Figure 22: Forgot Password Field**

4. After successful changing a password, the system displays a success message and sends the new password to the registered email Id as shown as –“New Password has been sent to your mail”.

***Note: If user enters wrong user ID, system will show Invalid User ID message as shown as – “Invalid User ID”.***



## 6. Reset Login Details for SDA

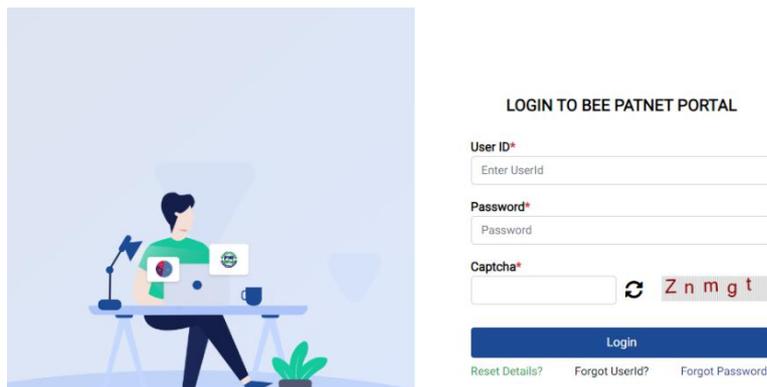
This section explains the process of changing the details of the SDA users (TO or NO) in their absence.

In some cases, SDA users leaves organisation without handing over their existing user details. In these scenarios **SDA** can reset their details by using “**Reset Details**” functionality available in PATNET Portal home page.

**Note:** *The above mentioned procedure will applicable if recovery email address have been updated in the system for organizations.*

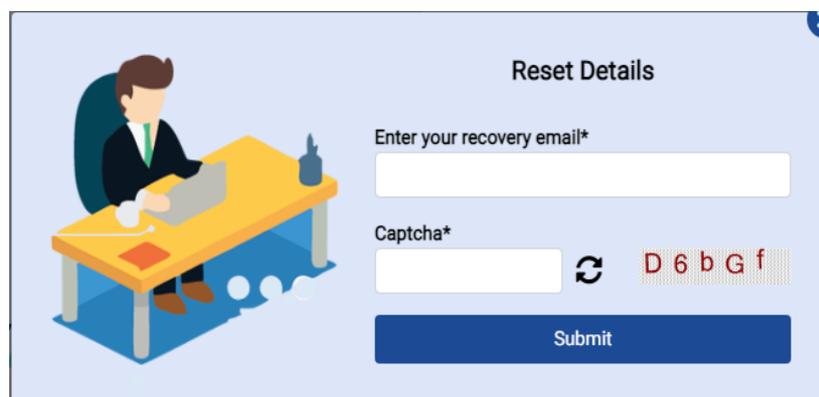
**SDA** can reset their login ID and password by following the below steps.

1. Open e-filing portal by clicking the link (<https://escerts.gov.in>).  
(The ‘BEE PATNET portal Login’ page appears).
2. Click on **Reset Details** link which is present in the login page as shown in below image.



**figure 26: Reset Details**

3. The system will redirect user to the **Reset Details** page. Enter the recovery **Email Id** given by the SDA at the time of registration and the **Captcha** and then click the **Submit** button.



**Figure 27: Reset Details Page**



4. After successful submission, a web link will be sent to recovery email Id of SDA and success message will be displayed as shown as –“An email has been sent to your mail id with link to reset the details”.

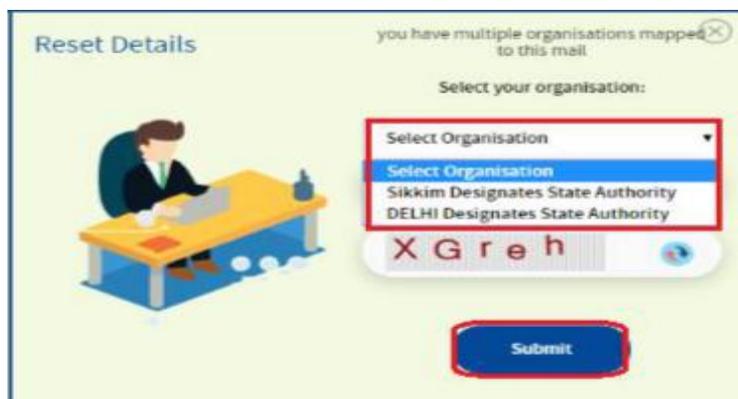
**Note:** If given Recovery Email ID is wrong then system shows invalid Email ID message as shown as “Recovery email is invalid (or) Registration is not approved”.

5. The authorized person who handles the recovery email will receive the link to reset the details.



**Figure 30: Reset Email**

6. Click on the **Reset Link**, a portal page opens with the options to select the organisation. Select the organisation from the list to modify the details and click the **Submit** button.



**Figure 31: Multi Organization Selection List**



7. User is re-directed to the portal and where he/she can modify the details and click on **Update** button.

**STATE DESIGNATED AGENCY REGISTRATION DETAILS**

**SDA Details**

State: Sikkim      SDA Name: Sikkim Designates State Authority      Address Line: #307 M G Road1 near Bus stand Gangtok AAA, Gangtok 560100      Recovery Email Id: [darshan.alke@gmail.com](mailto:darshan.alke@gmail.com)

**Technical Officer Details**

Name [Mr./Ms.]: MURALI TO      Mobile No.: +91 7989283874      Email Id: saikuneti111@gmail.com

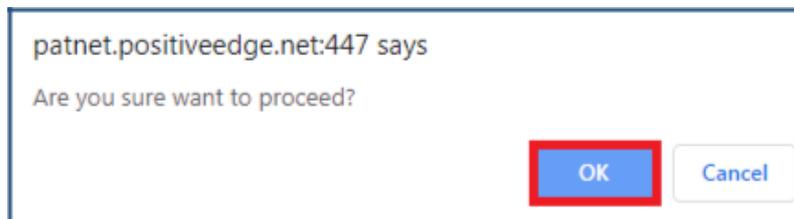
**Nodal Officer Details**

Name [Mr./Ms.]: ABISON NO      Mobile No.: +91 9741192764      Email Id: sda3@gmail.com

Buttons: Cancel, Update

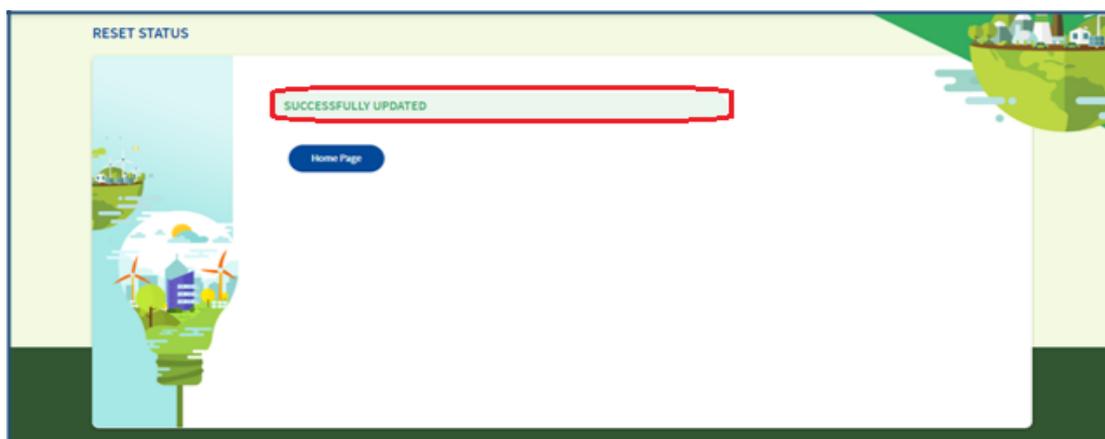
**Figure 32: Reset User Detail**

8. The Confirmation message pop-ups as below, click **Ok**.



**Figure 33: Confirmation pop-up Message**

9. The record will be updated and user will get success page.



**Figure 34: Reset User Detail Success Message**

10. After successful update of login details, an email with new login credential will be sent the email address of SDA user.



**Note:** Reset Link will get expire once user updates the record using shared link.

## 7. SDA Profile Update by the Nodal Officer

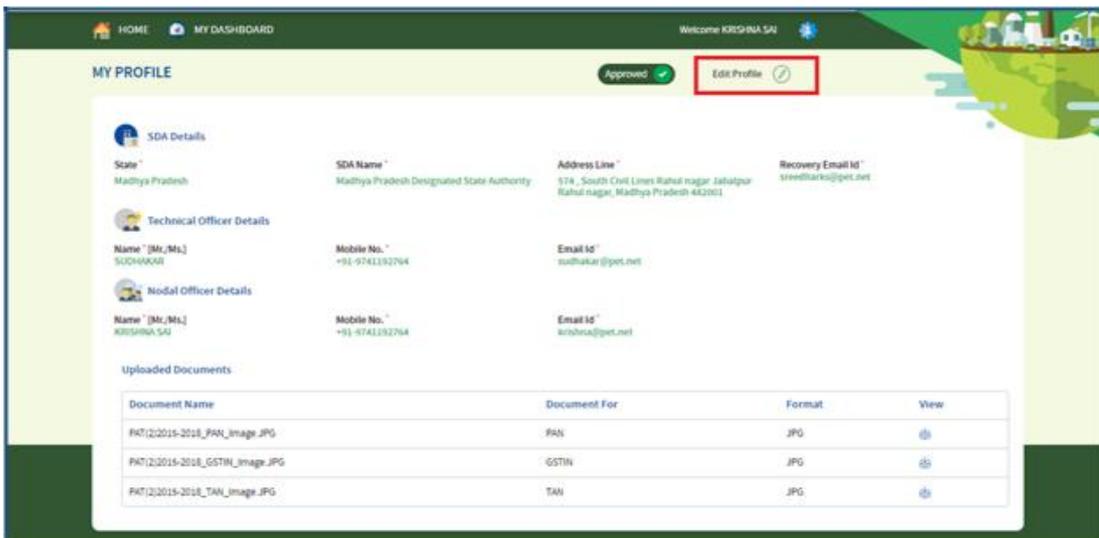
This section explains how the Nodal Officer updates the SDA profile details.

1. Nodal Officer Logs in to PATNET portal by using his/her login credentials (Refer to section 3 for the login steps).
2. On successful login, the Nodal officer home page appears as shown in below image. Click on **Profile** link.



**Figure 35: Home Page**

3. The SDA profile page will be displayed with **Edit Profile** button as shown in below image.



**Figure 36: SDA Edit Profile**



- Click on **Edit Profile** button. Then the fields will be editable for **Technical Officer (TO)** and **Nodal officer (NO)** as shown in below image.

**MY PROFILE** Approved

**SDA Details**

State: Madhya Pradesh | SDA Name: Madhya Pradesh Designated State Authority | Address Line: 574, South Civil Lines Rahul Nagar Jabalpur Rahul Nagar, Madhya Pradesh 482002 | Recovery Email id: sreedharks@pet.net

**Technical Officer Details**

Name: SUDHAKAR | Mobile No.: +91 9741192764 | Email id: sudhakar@pet.net

**Nodal Officer Details**

Name: KRISHNA SAI | Mobile No.: +91 9741192764 | Email id: krishna@pet.net

**Uploaded Documents**

Document Name	Document For	Format	View
PAT(2)2015-2018_PAN_image.JPG	PAN	JPG	
PAT(2)2015-2018_GSTIN_image.JPG	GSTIN	JPG	
PAT(2)2015-2018_TAN_image.JPG	TAN	JPG	

Buttons: Cancel, Submit

**Figure 37: SDA Edit Profile**

- User will edit the information and submit the record. Then the success message will be displayed as shown in below image.

**MY PROFILE** Approved Edit Profile

Details updated successfully!

**SDA Details**

State: Madhya Pradesh | SDA Name: Madhya Pradesh Designated State Authority | Address Line: 574, South Civil Lines Rahul Nagar Jabalpur Rahul Nagar, Madhya Pradesh 482002 | Recovery Email id: sreedharks@pet.net

**Technical Officer Details**

Name: SUDHAKAR | Mobile No.: +91 9741192764 | Email id: sudhakar@pet.net

**Nodal Officer Details**

Name: KRISHNA SAI | Mobile No.: +91 9741192764 | Email id: krishna@pet.net

**Uploaded Documents**

Document Name	Document For	Format	View
PAT(2)2015-2018_PAN_image.JPG	PAN	JPG	
PAT(2)2015-2018_GSTIN_image.JPG	GSTIN	JPG	
PAT(2)2015-2018_TAN_image.JPG	TAN	JPG	

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**Figure 38: Profile Details Update Success Message**



## 8. Review and Provide Comments on Form 1

Login to the BEE portal with application **URL**, **Technical Officer (TO) User Name**, and **Password**.

On Successful login the user is navigated to the SDA Dashboard page. Perform the following actions on the SDA Dashboard page to approve all the forms.

1. On the SDA Dashboard page select the **PAT Cycle** from the 'PAT Cycle' drop-down list and then click the **Search** button. All the forms submitted for that PAT Cycle by DC/EmAEA under respective Forms (1, A, B, D, 2 and 3) icon will appear on the page.
2. Click on **Form 1** icon, and then click **List of Form 1's** tab to view records related to the selected PAT cycle.
3. Click the **View** link of the records to view and review the Form 1 details.

S.No.	DC Reg No.	Designated Consumer Name	PAT Cycle	FORM 1	Attachments		
				First Yr	Second Yr	Third Yr	
1	REGDIS0001NA	Sreedhar BUILDERS	PAT(5)2019-2022	<a href="#">View</a>			DC SDA

**Figure 39: Technical Officer Dashboard Page**

4. The 'Sector-wise Details' page appears as shown in below image. **Technical officer (TO)** will review the Form 1 details entered by the EM.

Name of The Sector	Sub-Sector	Pro-forma in which the details to be furnished
Buildings	Buildings	BU1



**Figure 40: Sector-wise Details Page**

5. Click on **Comment** button to enter the review comments.
6. The Comments window appears as shown below. User can enter the comment and submits the record after clicking on **Submit** button.

**Figure 41: Comments pop-up Box**

7. The comments will be saved in **View Comments** pop up window.

**Figure 42: Comments Page**

***Notes: The following activities take place on verifying the Form 1.***

- 1) ***An email notification will be sent to the SDA-Nodal Officer (NO) to Verify/Review Form 1.***
- 2) ***For SDA-Nodal Officer (NO), above commenting process will be repeated.***

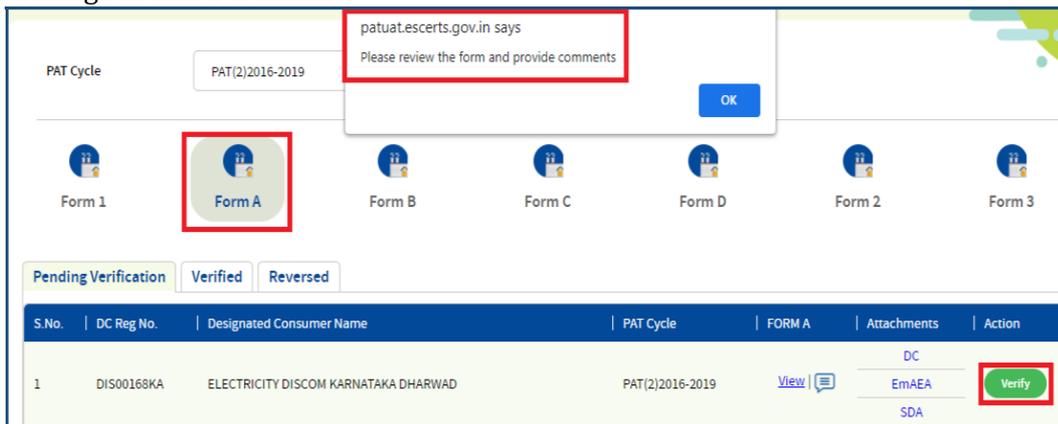


## 9. Review and Provide Comments on Form A

Login to the BEE portal with application **URL**, **Technical Officer (TO) User Name**, and **Password**.

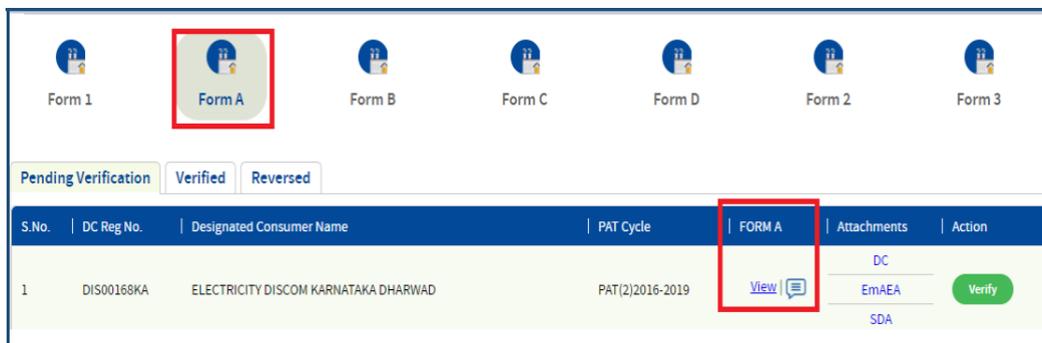
On Successful login the user is navigated to the SDA Dashboard page. Perform the following actions on the SDA Dashboard page to approve all the forms.

1. On the SDA Dashboard page select the **PAT Cycle** from the 'PAT Cycle' drop-down list and then click the **Search** button.  
All the forms submitted for that PAT Cycle by DC/EmAEA are listed under respective Form's icon (1, A, B, D, 2 and 3) into different tabs such as 'Pending Verification', 'Verified' and 'Reversed' as shown in below image.
2. Click on **Form A** icon, and then click **Pending Verification** tab to view records related to the selected PAT cycle.
3. On click of verify link, if user has not provided the comments, it will throw a validation message to add a comments



**Figure 433: Verify Link**

4. Click the **View** link for the record to view and review Form A details.



**Figure 444: View Link**

5. The 'Energy Efficiency Project Implemented' page appears as shown in below image. Technical Officer (TO) will review the Form A details entered by the EM.





**Figure 455: Energy Efficiency Project Implemented Page**

6. Click on **Comment** button to enter the review comments.
7. The Comments pop-up window appears as shown in below image where user can enter the review comments and submits the record by clicking on **Submit** button.



**Figure 46: Comments pop-up window**

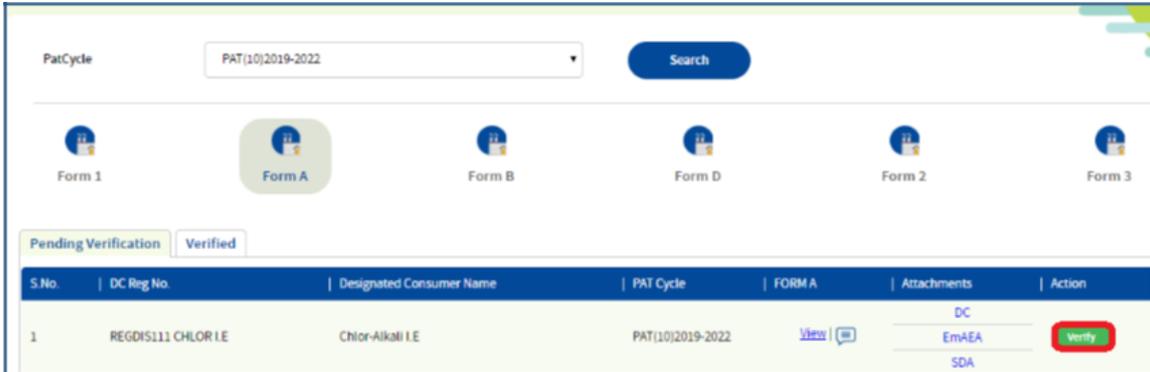
8. The comments will be saved in **View Comments** pop up window.



**Figure 467: Comments Page**

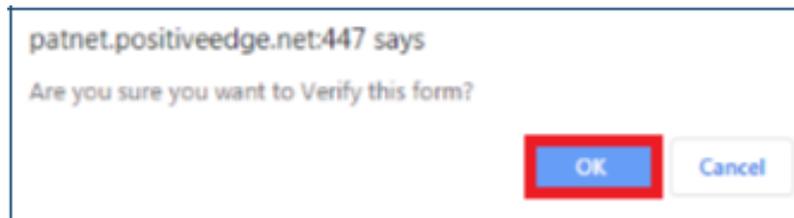


9. Under **Pending Verification** tab click on the **Verify** button to verify Form A.



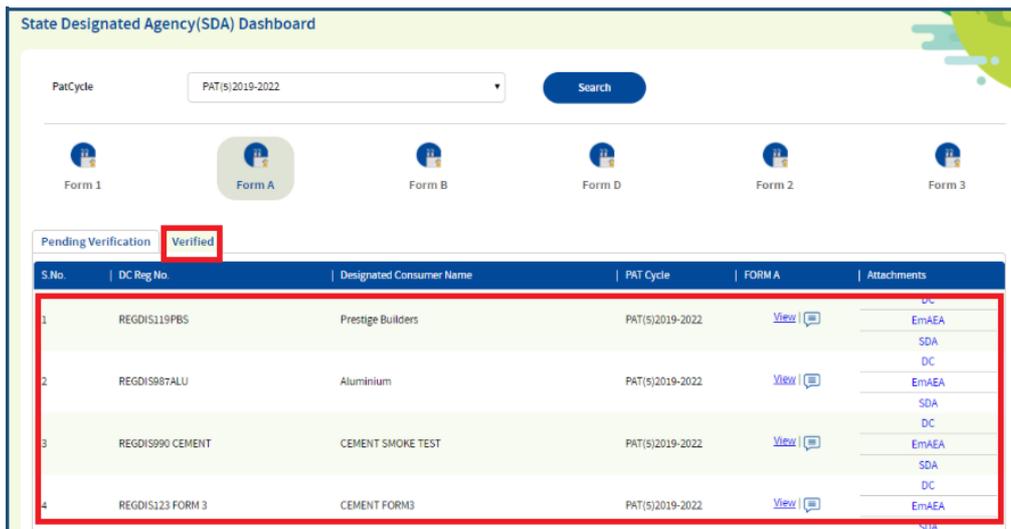
**Figure 48: Click Verify**

10. The Confirmation message pop-ups, click **Ok**.



**Figure 49: Confirmation Message**

11. The verified Form A records are available under the **Verified** tab.



**Figure 50: Verified Form A**



**Notes: The following activities take place on verifying the Form A by Nodal Officer (NO) user.**

- 1) On verification of Form-A record by Technical Officer (TO), an email notification will be sent to the SDA-Nodal Officer (NO) to Review/Verify Form A.**
- 2) Similar commenting process will be repeated by SDA- Nodal Officer (NO) user.**
- 3) On verification of Form-A by SDA- Nodal Officer (NO) user, the Form A record will be assigned to Sector Project Engineer (SPE) or Sector Expert (SE) available for that sector in BEE.**

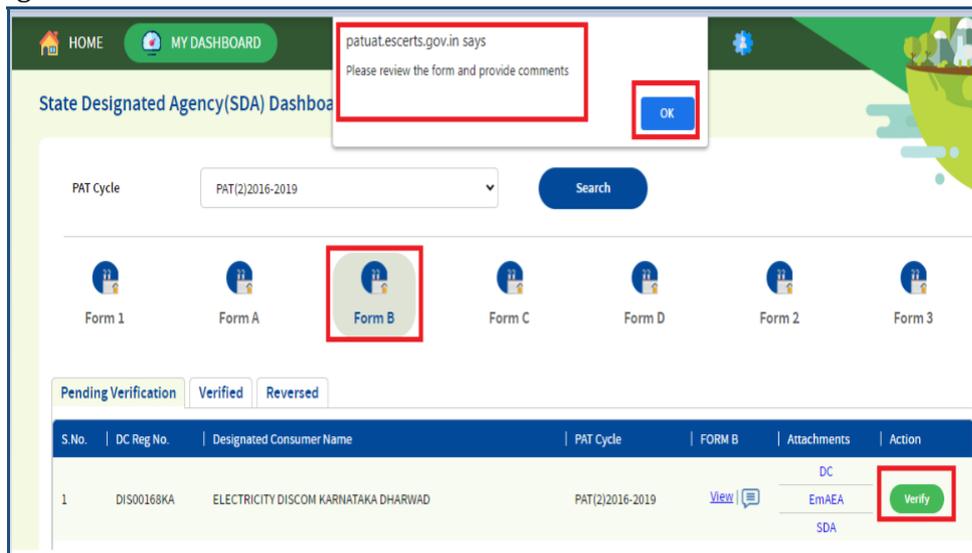


## 10. Review and Provide Comments on Form B

Login to the BEE portal with application **URL**, **Technical Officer (TO) User Name**, and **Password**.

On Successful login the user is navigated to the SDA Dashboard page. Perform the following actions on the SDA Dashboard page to approve all the forms.

1. On the SDA Dashboard page select the **PAT Cycle** from the 'PAT Cycle' drop-down list and then click the **Search** button.  
All the forms submitted for that PAT Cycle by DC/EmAEA are listed under respective Form's icon (1, A, B, D, 2 and 3) into different tabs such as 'Pending Verification', 'Verified' and 'Reversed' as shown in below image.
2. Click on **Form B** icon, and then click **Pending Verification** tab to view records related to the selected PAT cycle.
3. On click of **verify** link, if user has not provided the comments will throw a validation message to add a comment.



**Figure 51: Verify Link**

4. Click the **View** link for the record to view and review Form B details.



**Figure 52: View Link**

- The 'Performance Assessment Document' page appears as shown in below image. Technical Officer (TO) will review the Form B details entered by the EmAEA.

The screenshot shows a web interface for the 'Performance Assessment Document' page. On the left, there is a blue sidebar with a white document icon. The main content area is titled 'Performance Assessment Document' and contains a table with the following data:

General Info	Details
Empanelled Accredited Energy Auditor Name	AAA Energy Auditor
Undertaken By	Bureau Of Energy Efficiency
Power Notification No	G.S.R. 269 (E)
Power Notification Date	30th March, 2012
Number of ESCerts	200 <input checked="" type="radio"/> Issued <input type="radio"/> Purchased
Name of EmAEA	Laxman k
EmAEA Designation	Empanelled Accredited Energy Auditor
Verification Start Date	20-03-2019

At the bottom of the form, there are three buttons: 'Cancel' (green), 'Print' (blue), and 'Comment' (red, highlighted with a red box).

**Figure 53: Performance Assessment Document Page**

- Click on **Comment** button to enter the review comments.
- The Comments pop-up window appears as shown in below image where user can enter the review comments and submits the record by clicking on **Submit** button.



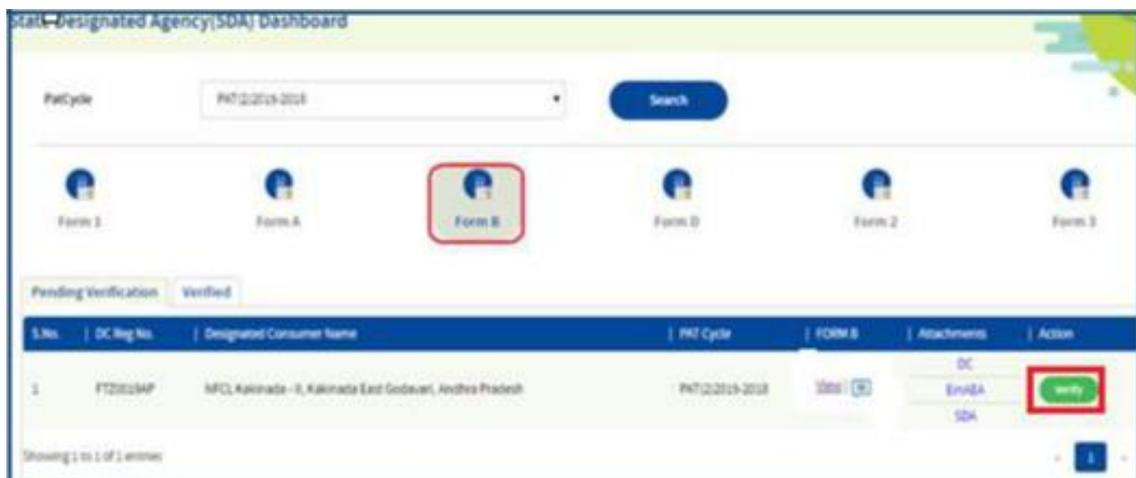
**Figure 54: Comments Pop-up Box**

8. The comments will be saved in **View Comments** pop up window.



**Figure 55: Comments Page**

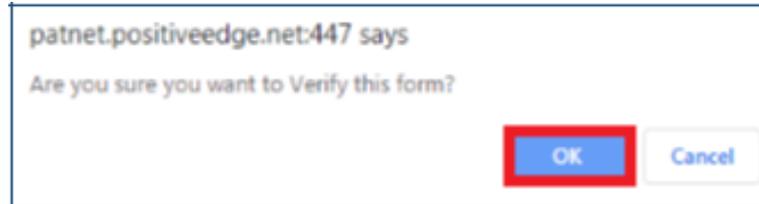
9. Under **Pending Verification** tab click on the **Verify** button to verify Form B.



**Figure 56: Click Verify Button**

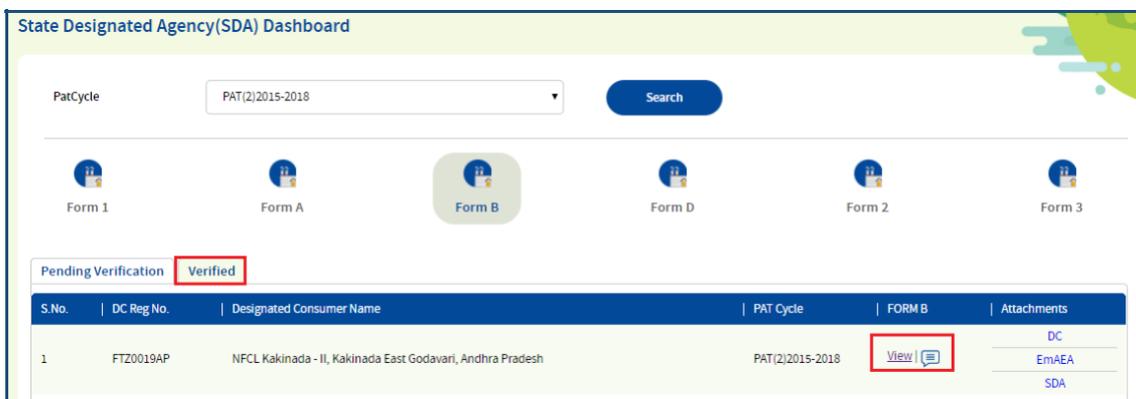


10. The Confirmation message pop-ups, click **Ok**.



**Figure 57: Confirmation Message**

11. The verified Form B records are available under the **Verified** tab.



**Figure 58: Verified Form B**

**Notes:** The following activities take place on verifying the Form B by Nodal Officer (NO) user.

- 1) On verification of Form-B record by Technical Officer (TO), an email notification will be sent to the SDA-Nodal Officer (NO) to Review/Verify Form B.
- 2) Similar commenting process will be repeated by SDA- Nodal Officer (NO) user.
- 3) On verification of Form-B by SDA- Nodal Officer (NO) user, the Form B record will be assigned to Sector Project Engineer (SPE) or Sector Expert (SE) available for that sector in BEE.

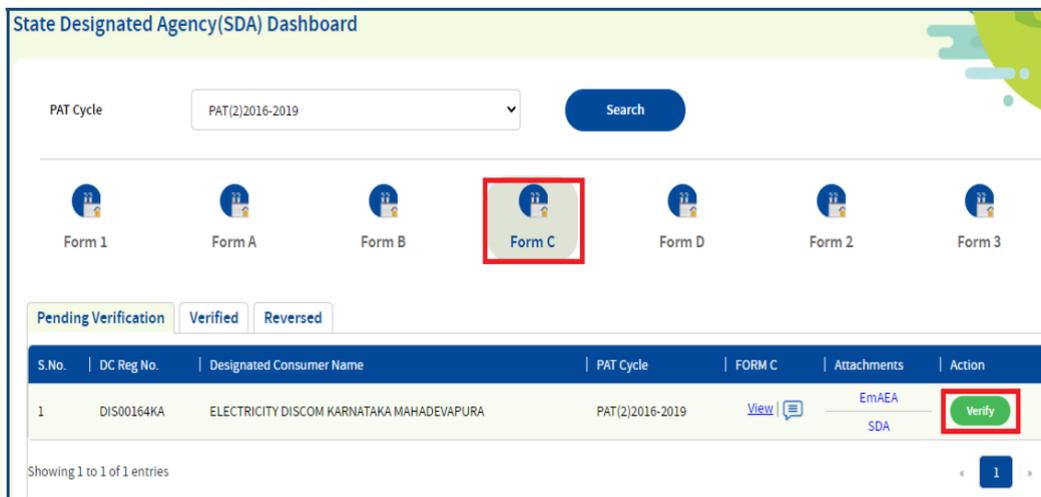


## 11. Review and Provide Comments on Form C

Login to the BEE portal with application URL, Technical Officer (TO) User Name, and Password.

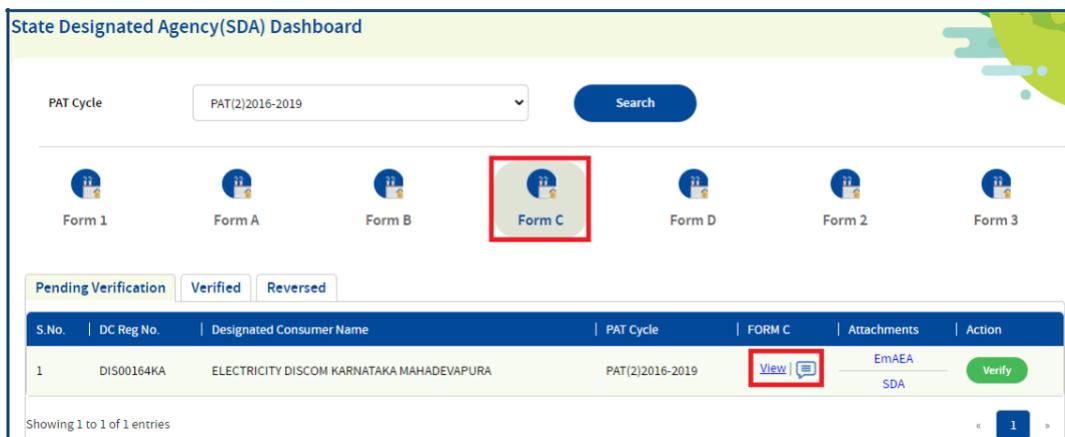
On Successful login the user is navigated to the SDA Dashboard page. Perform the following actions on the SDA Dashboard page to approve all the forms.

- 1) On the SDA Dashboard page select the PAT Cycle from the 'PAT Cycle' drop-down list and then click the Search button.  
All the forms submitted for that PAT Cycle by DC/EmAEA are listed under respective Form's icon (1, A, B, D, 2 and 3) into different tabs such as 'Pending Verification', 'Verified' and 'Reversed' as shown in below image.
- 2) Click on **Form C** icon, and then click **Pending Verification** tab to view records related to the selected PAT cycle.
- 3) On click of **verify** link, if user has not provided the comments will throw a validation message to add a comment



**Figure 59: Verify Link**

- 4) Click the **View** link for the record to view and review Form C details.



**Figure 60: View Link**



- 5) The FROM C page appears as shown in below image. Technical Officer (TO) will review the Form C details entered by the EmAEA.

Performance Assessment Document	
Power Notification No	G. S.R. 269 (E)
Power Notification Date	29th March, 2012
Number of ESCerts	1400 <input checked="" type="radio"/> Issued <input type="radio"/> Purchased
Name of EmAEA	SREEDHAR
EmAEA Designation	Empanelled Accredited Energy Auditor
Verification Start Date	04-06-2021
Verification End Date	04-06-2021
Value of Amount Payable by DC (Rs.)	5600.0000

I hereby Declare that the above-mentioned information is correct up to my knowledge.

**Figure 61: FORM C DETAILS PAGE**

- 6) Click on **Comment** button to enter the review comments.  
7) The Comments pop-up window appears as shown in below image where user can enter the review comments and submits the record by clicking on **Submit** button.

Comments

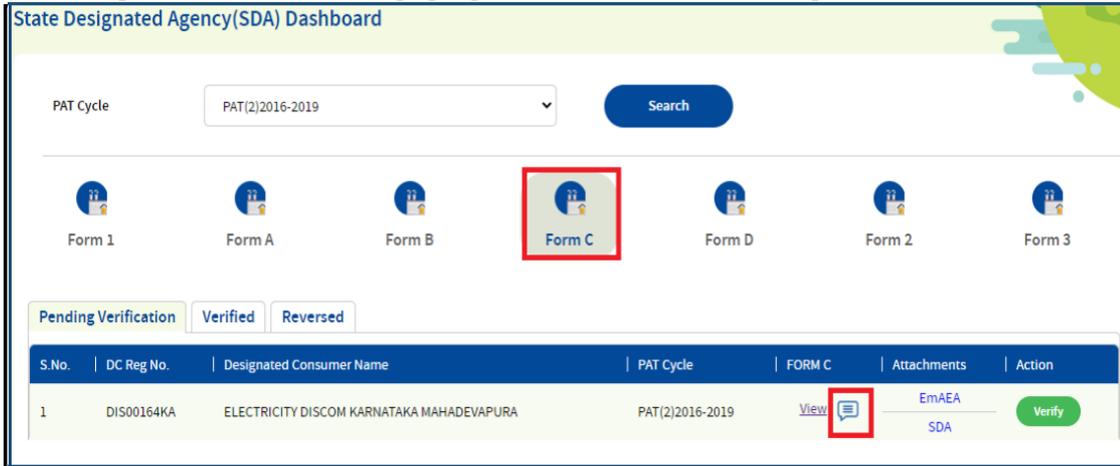
TECHNICAL OFFICER REVIEWED THE FORM C DETAILS AND PROVIDED COMMENTS

Submit

**Figure 62: Comments pop-up window**

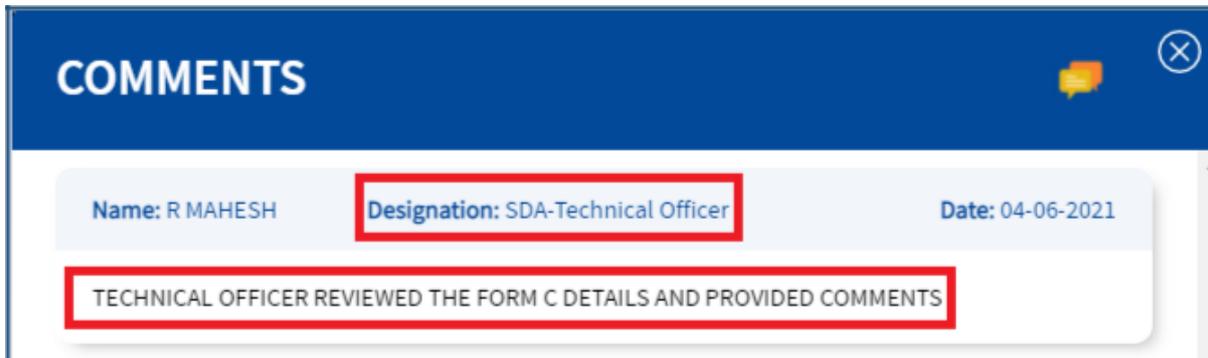


6. On clicking of Comments icon, a pop-up window of **Comments** is presented.



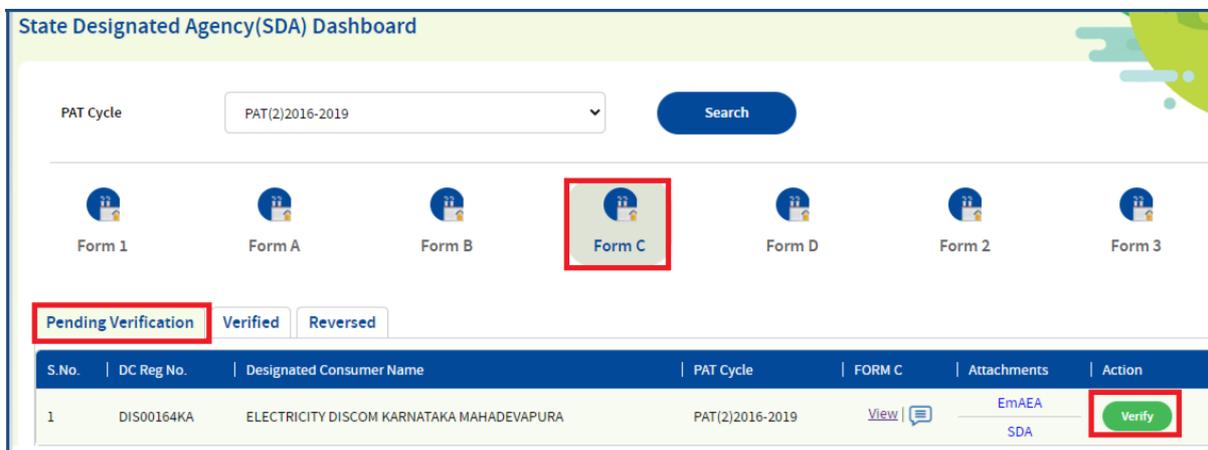
7. **Figure 63: Comments Icon**

8. The comments provided by the Technical Officer (TO) user will be presented in **View Comments** pop up window.



**Figure 64: Comments Page**

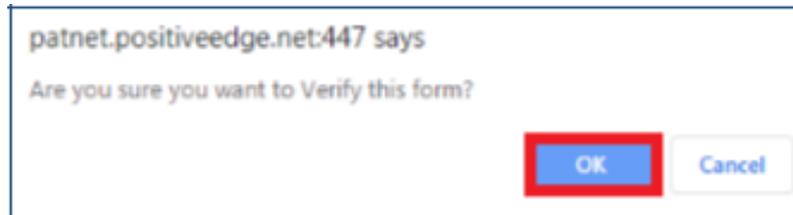
9. Under **Pending Verification** tab click on the **Verify** button to verify Form C.





**Figure 65: Click Verify**

10. The Confirmation message pop-ups, click **Ok**.



**Figure 66: Confirmation Message**

11. The verified Form C records are available under the **Verified** tab.

S.No.	DC Reg No.	Designated Consumer Name	PAT Cycle	FORM C	Attachments
1	DIS00164KA	ELECTRICITY DISCOM KARNATAKA MAHADEVAPURA	PAT(2)2016-2019	<a href="#">View</a>	<a href="#">EmAEA</a> <a href="#">SDA</a>

**Figure 67: Verified Form A**

**Notes:** The following activities take place on verifying the Form C by Nodal Officer (NO) user.

- 1) On verification of Form-C record by Technical Officer (TO), an email notification will be sent to the SDA-Nodal Officer (NO) to Review/Verify the specified Form C.
- 2) Similar commenting process will be repeated by SDA- Nodal Officer (NO) user.
- 3) On verification of Form-C by SDA- Nodal Officer (NO) user, the Form B record will be assigned to Sector In-charge (SI) of that sector in BEE.

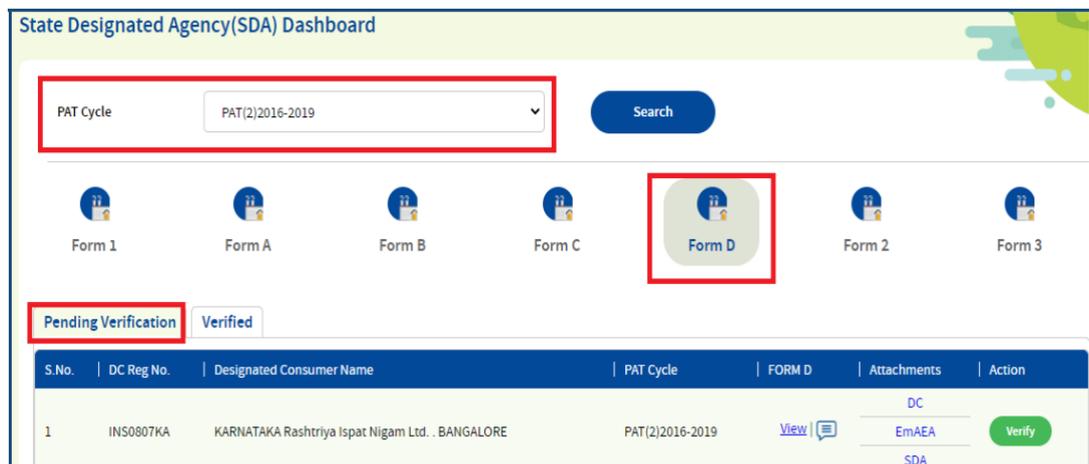


## 12. Review and Provide Comments on Form D

Login to the BEE portal with application **URL**, **Technical Officer (TO) User Name**, and **Password**.

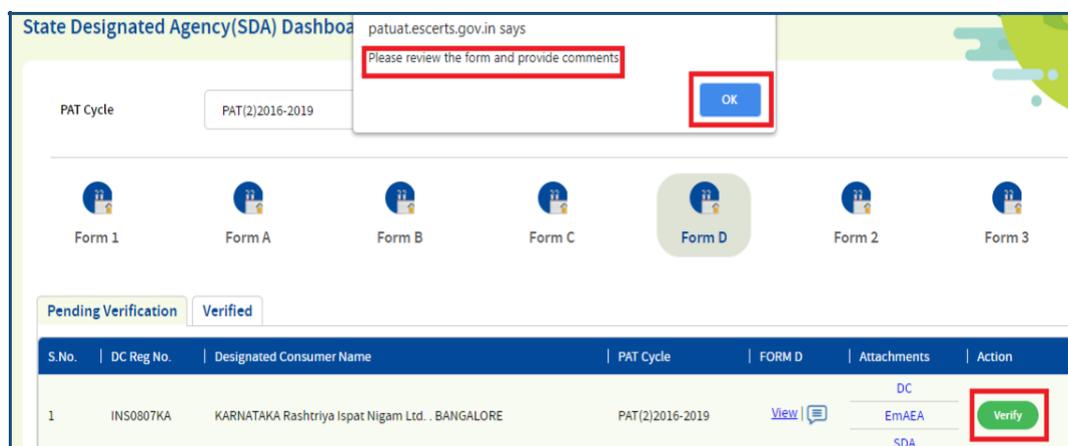
On Successful login the user is navigated to the SDA Dashboard page. Perform the following actions on the SDA Dashboard page to approve all the forms.

- 1) On the SDA Dashboard page select the PAT Cycle from the 'PAT Cycle' drop-down list and then click the Search button.  
All the forms submitted for that PAT Cycle by DC/EmAEA are listed under respective Form's icon(1, A, B, D, 2 and 3) into different tabs such as 'Pending Verification and 'Verified' as shown in below image.
- 2) Click on **Form D** icon, and then click **Pending Verification** tab to view records related to the selected PAT cycle.



**Figure 68: Pending Verification FORM D**

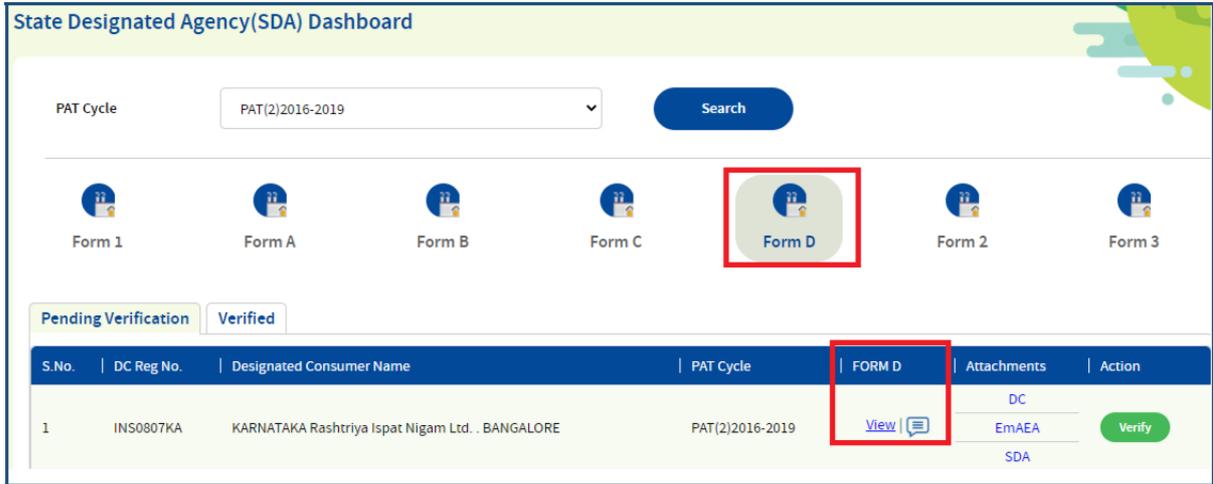
- 3) On click of **Verify** link, if user has not provided the comments, it will throw a validation message to enter comments. Below Confirmation message pop-ups, click **Ok**.



**Figure 69: Verify Link**

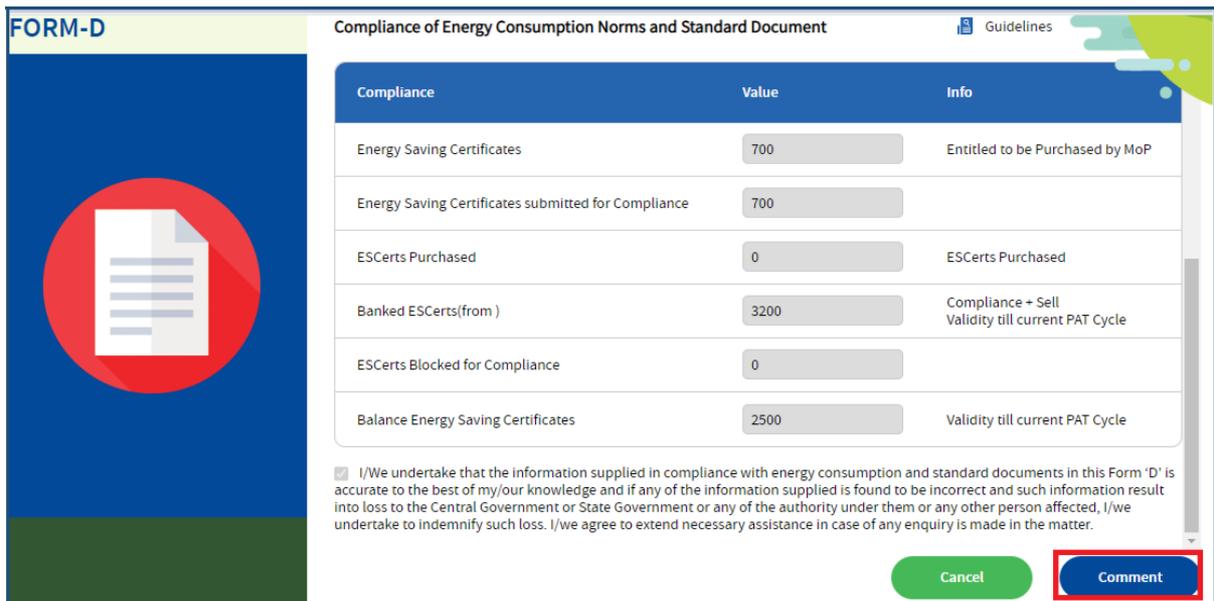


4) Click the **View** link for the record to view and review Form D details.



**Figure 70: View Link**

5) The FORM D page appears as shown in below image. Technical Officer (TO) will review the Form D details entered by the Plant Head (PH).



**Figure 71: FORMD Details Page**

6) Click on **Comment** button to enter the review comments.

7) The Comments pop-up window appears as shown in below image where user can enter the review comments and submits the record by clicking on **Submit** button.



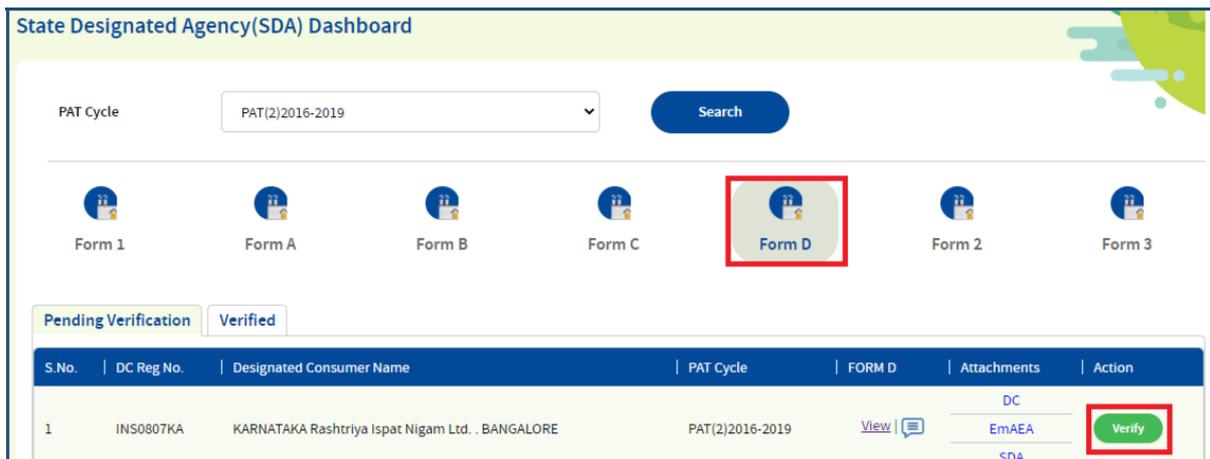
**Figure 72: Comments pop-up box**

- 8) The review comments provided by the user will be presented in **View Comments** pop up window.



**Figure 73: Comments Page**

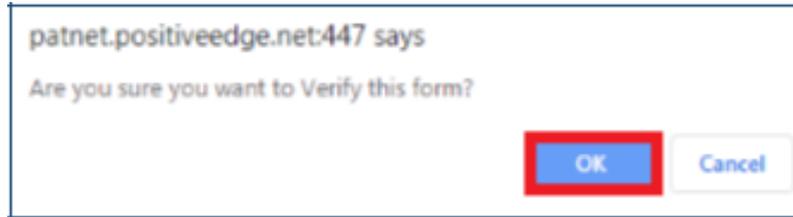
- 9) Under **Pending Verification** tab click on the **Verify** button to verify Form D.



**Figure 74: Click Verify**

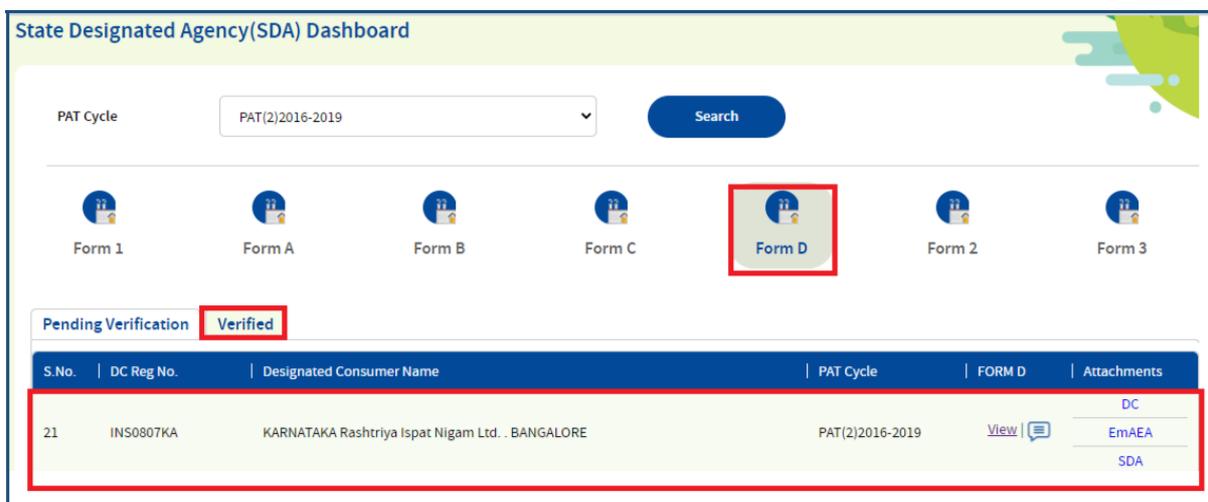


10. The Confirmation message pop-ups, click **Ok**.



**Figure 75: Confirmation Message**

11. The verified Form D records are available under the **Verified** tab.



**Figure 76: Verified Form D**

**Notes:** The following activities take place on verifying the Form D by Nodal Officer (NO) user.

- 1) On verification of Form-D record by Technical Officer (TO), an email notification will be sent to the SDA-Nodal Officer (NO) to Review/Verify specified Form D.
- 2) Similar commenting process will be performed by SDA- Nodal Officer (NO) user.
- 3) On verification of Form-D by SDA- Nodal Officer (NO) user, the Form D record will be assigned to Sector In-Charge (SI) of that sector in BEE.

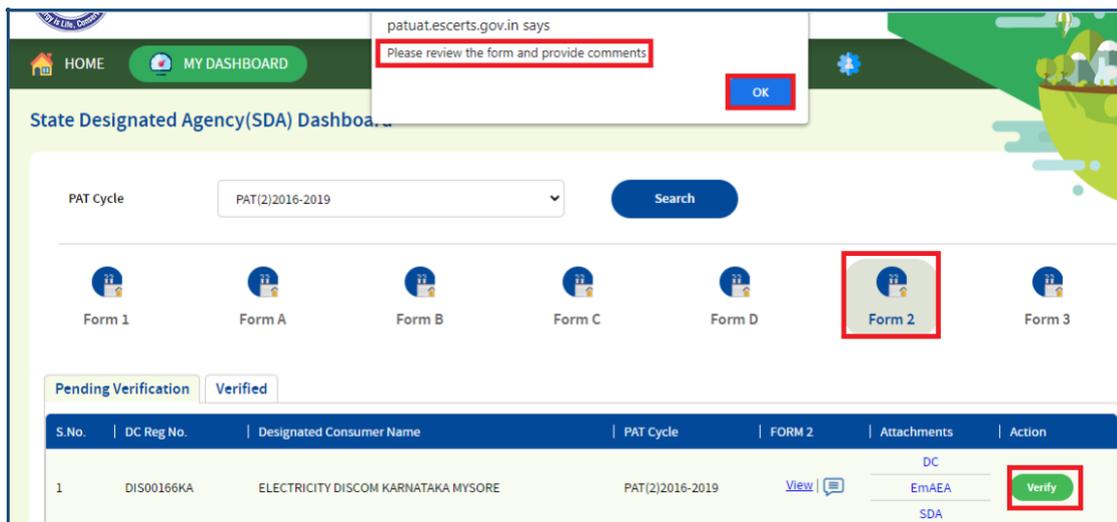


## 13. Review and Provide Comments on Form 2

Login to the BEE portal with application **URL**, **Technical Officer (TO) User Name**, and **Password**.

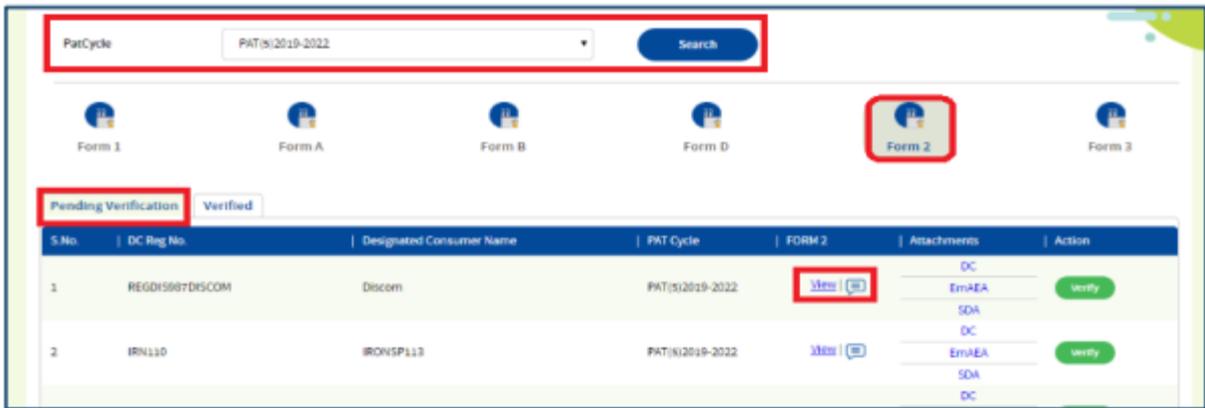
On Successful login the user is navigated to the SDA Dashboard page. Perform the following actions on the SDA Dashboard page to approve all the forms.

1. On the SDA Dashboard page select the **PAT Cycle** from the 'PAT Cycle' drop-down list and then click the **Search** button.  
All the forms submitted for that PAT Cycle by DC/EmAEA are listed under respective Form's icon (1, A, B, D, 2 and 3) into different tabs such as 'Pending Verification and 'Verified' as shown in below image.
2. Click on **Form 2** icon, and then click **Pending Verification** tab to view records related to the selected PAT cycle.
3. On click of **Verify** link, if user has not provided the comments, it will throw a validation message to enter comments. Below Confirmation message pop-ups, click **Ok**.



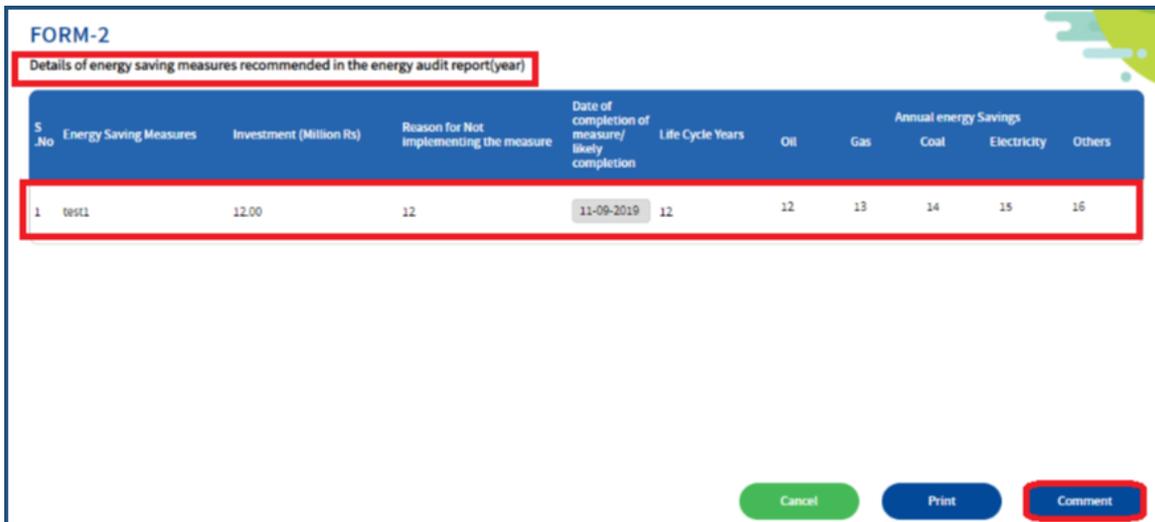
**Figure 77: Verify Link**

4. Click the **View** link for the record to view and review Form 2 details.



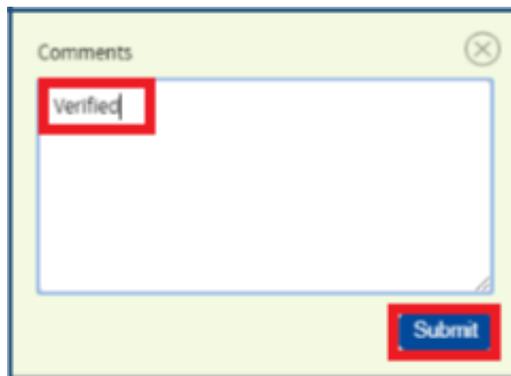
**Figure 78: SDA Dashboard Page – Form 2**

5. The ‘Details of energy saving measures recommended.....’ page appears as shown in below image. Technical Officer (TO) will review the Form 2 details entered by the Plant Head (PH).



**Figure 79: Details of Energy Saving Measures Page**

10. Click on **Comment** button to enter the review comments.
11. The Comments pop-up window appears as shown in below image where user can enter the review comments and submits the record by clicking on **Submit** button.



**Figure 80: Comments Pop-up window**

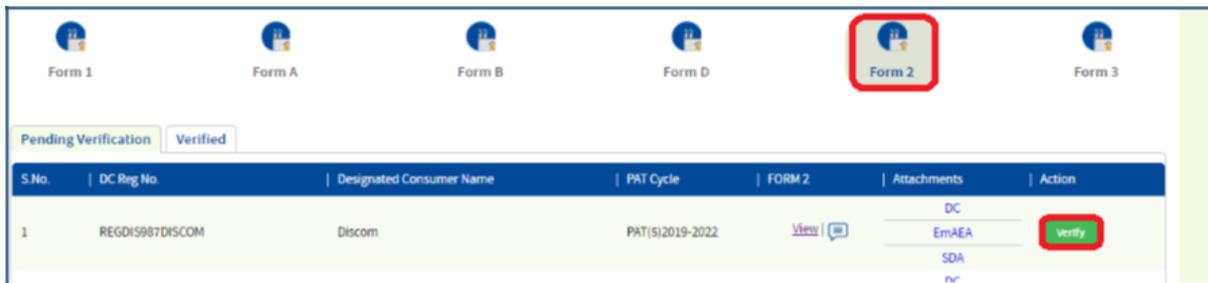


12. The comments will be presented **Comments** pop up window.



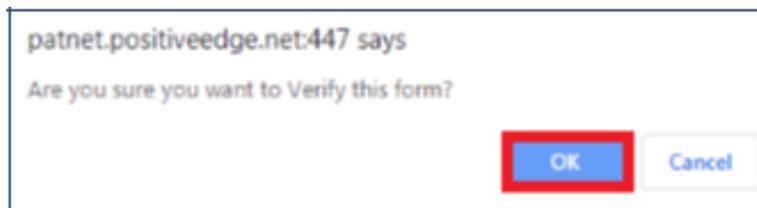
**Figure 81: Comments Page**

13. Under **Pending Verification** tab click on the **Verify** button to verify Form 2.



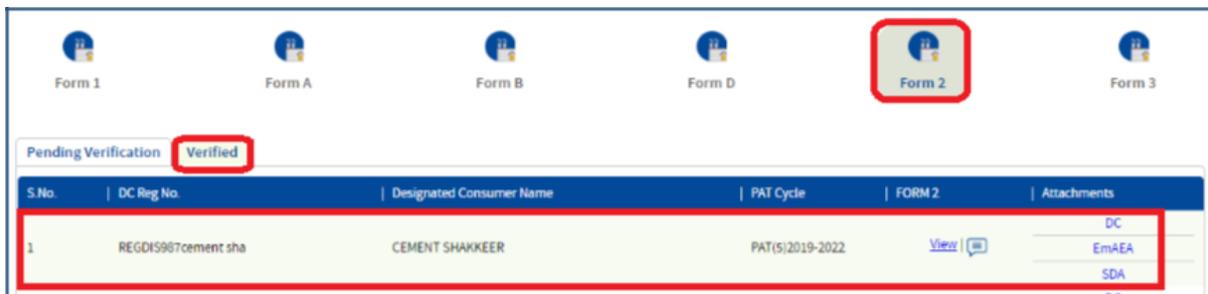
**Figure 82: Click Verify Button**

14. The Confirmation message pop-ups, click **Ok**.



**Figure 83: Confirmation Message**

15. The verified Form 2 records are available under the **Verified** tab.



**Figure 84: Verified Form 2**

16. Click **Print** button on the 'Details of energy saving measures recommended...' page to take print out of Form 2.



**Figure 85: Click Print button**

17. The Print format of Form 2 is shown in below image.

FORM 2										
Details of energy saving measures recommended in the energy audit report(year)										
[Refer Regulation 5(2)]										
S. No	Energy Saving Measures/Suggested categories of areas of improvement and modification for obtaining details of energy savings - See annexure 3)	Investment (Million Rs)	Reason for not implementing the measure	Date of completion of measure/likely to completion	Life Cycle Years	Annual Energy Savings				
						Oil	Gas	Coal	Electricity	Other
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
1	test1	12.00	12	11-09-2019	12	12	13	14	15	16
Signature						Signature Abison I.E				

**Figure 86: Form 2 Print format**

**Notes:** The following activities take place on verifying the Form 2 by Nodal Officer (NO) user.

- 1) On verification of Form-2 record by Technical Officer (TO), an email notification will be sent to the SDA-Nodal Officer (NO) to Review/Verify the specified Form 2.
- 2) Similar commenting process will be performed by SDA- Nodal Officer (NO) user.
- 3) On verification of Form-2 by SDA- Nodal Officer (NO) user, the Form 2 record will be assigned to respective Sector Project Engineer or Sector Expert (SE) available for that sector in BEE.

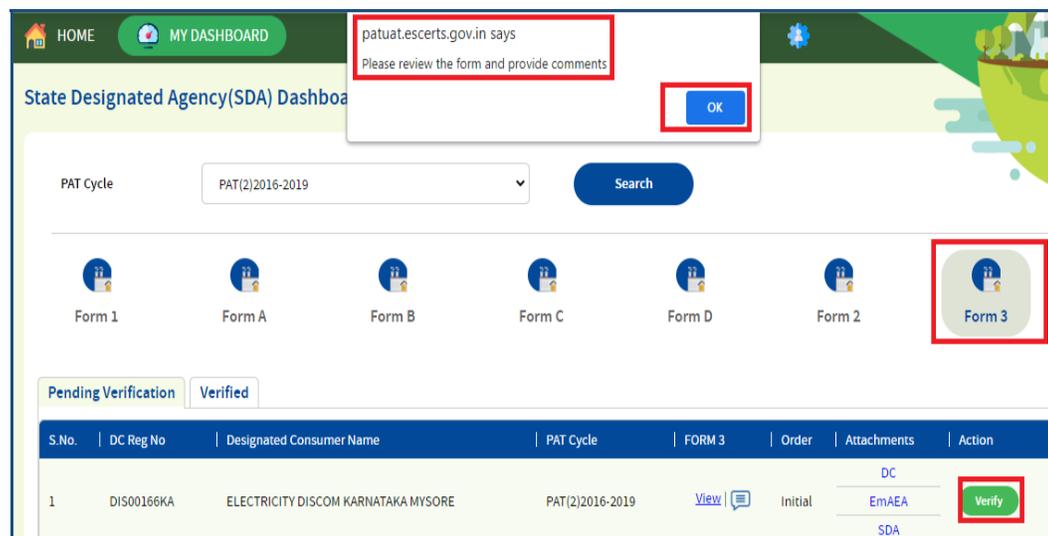


## 14. Review and Provide Comments on Form 3

Login to the BEE portal with application **URL**, **Technical Officer (TO) User Name**, and **Password**.

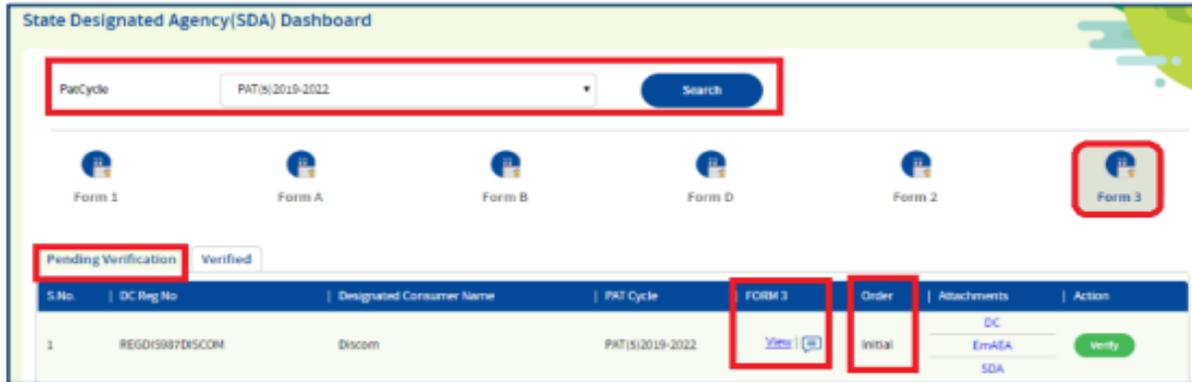
On Successful login the user is navigated to the SDA Dashboard page. Perform the following actions on the SDA Dashboard page to approve all the forms.

1. On the SDA Dashboard page, select the **PAT Cycle** from the 'PAT Cycle' drop-down list and then click on the **Search** button.  
All the forms submitted for that PAT Cycle by DC/EmAEA are listed under respective Form's icon (1, A, B, D, 2 and 3) into different tabs such as 'Pending Verification and 'Verified' as shown in below image.
2. Click on **Form 3**, and then click **Pending Verification** tab to view records related to the selected PAT cycle.
3. On click of **Verify** button, if user has not provided the comments, it will throw a validation message to enter comments. Below Confirmation message pop-ups, click **OK**.



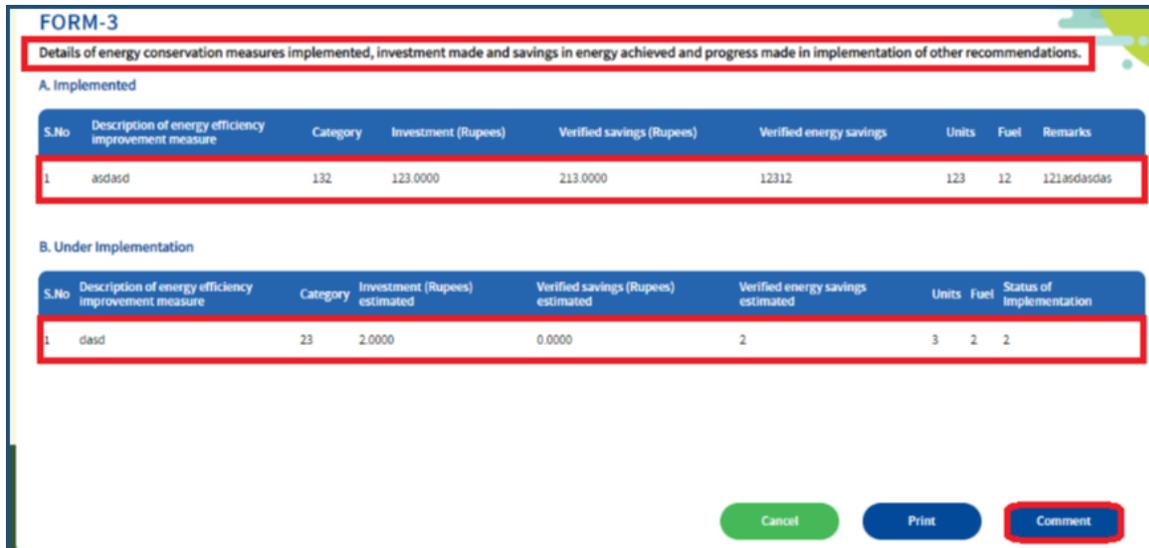
**Figure 87: Verify button**

4. Click the **View** link for the record with **Order** Status as **Initial** to view and review the Form 3 details.



**Figure 88: SDA Dashboard Page**

5. The 'Details of energy conservation measures implemented...' page appears as shown in below image. Technical Officer will review the Form 3 details entered by the Plant Head.



**Figure 89: Details of Energy Conservation Measures page**

6. Click on **Comment** button to enter the review comments.
7. A new pop-up window will be presented where user can provide the comments and click on **Submit** button.



Comments

Verified

Submit

**Figure 90: Comments Pop-up Box**

8. The comments will be presented **Comments** pop up window.

**COMMENTS**

Name: Akash Kumar      Designation: SDA-TO      Date: 13-09-2019

VERIFIED

**Figure 91: Comments Page**

9. Under **Pending Verification** tab click on the **Verify** button to verify Form 3.

Form 1      Form A      Form B      Form D      Form 2      **Form 3**

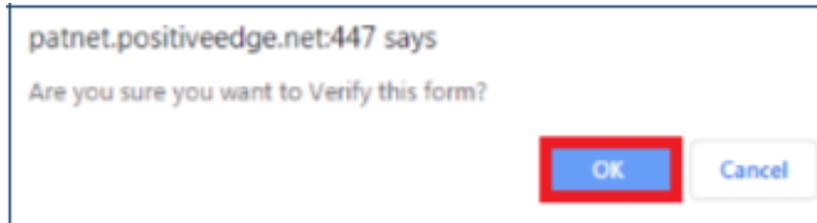
**Pending Verification**      Verified

S.No.	DC Reg No	Designated Consumer Name	PAT Cycle	FORM 3	Order	Attachments	Action
1	REG015987DISCOM	Discom	PAT(S)2019-2022	<a href="#">View</a>	<b>Initial</b>	DC EmAEA SDA	<b>Verify</b>

**Figure 93: Click Verify Button**

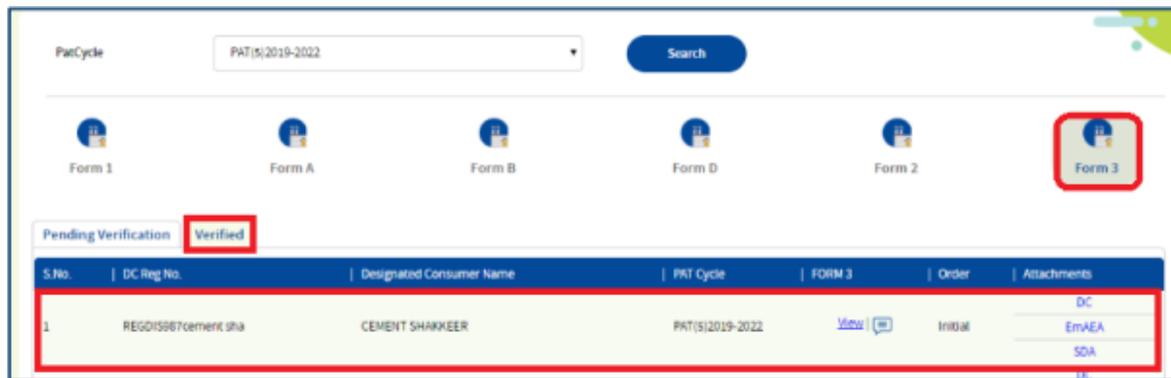


10. The Confirmation message pop-ups, click **Ok**.



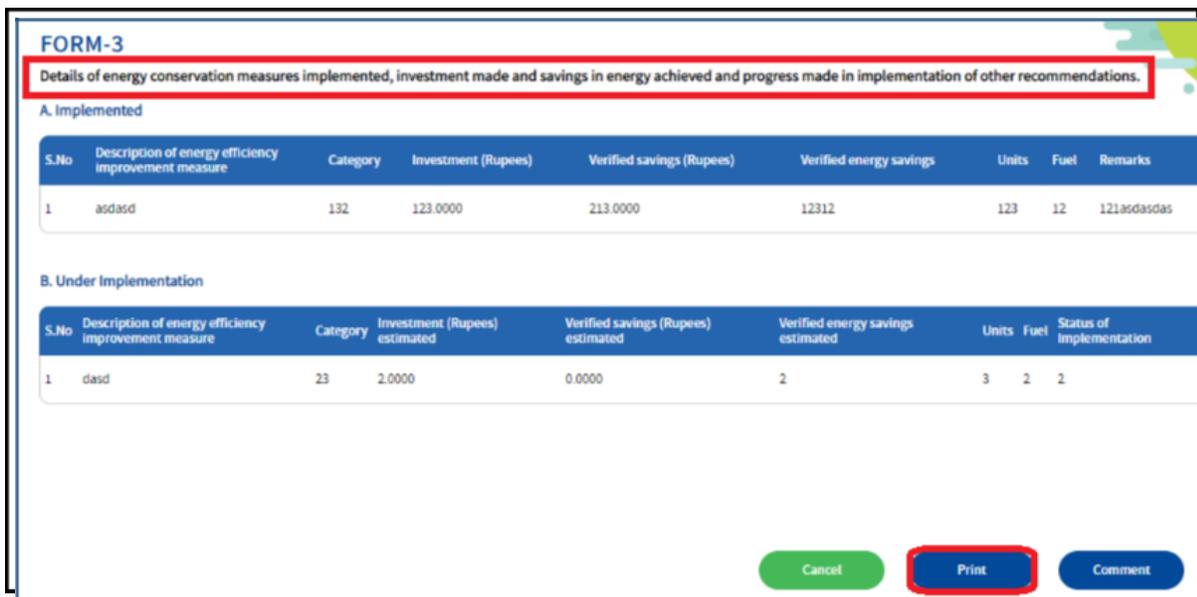
**Figure 93: Confirmation Message**

11 The verified Form 3 records are available under the **Verified** tab.



**Figure 94: Verified Form 3**

12. Click **Print** button on the 'Details of energy Conservation measures implemented' page to take print out of Form 3.





**Figure 95: Click Print**

13 The print format of Form 3 is shown below.

FORM 3								
[Refer Regulation 5(3)]								
DETAILS OF ENERGY CONSERVATION MEASURES IMPLEMENTED, INVESTMENT MADE AND SAVINGS IN ENERGY ACHIEVED AND PROGRESS MADE IN THE IMPLEMENTATION OF OTHER RECOMMENDATIONS								
<b>A. Implemented:</b>								
Sl. No	Description of energy efficiency improvement measure	Category	Investment(Rupees)	Verified Savings(Rupees)	Verified Energy Savings	Units	Fuel	Remarks
1	INDIAN OIL TESTED	PETROL TESTED	12.00	13.00	14.00	15	16	TESTED AND VERIFIED
2	DIESEL TESTED	DIESEL TESTED IN SHELL	13.00	14.00	15.00	16	17	TESTED AND VERIFIED
3	REFINED OIL TESTED	REFINED OIL TESTED	14.00	15.00	16.00	17	18	TESTED AND VERIFIED THE REFINED OIL
4	SUNFLOWER OIL TESTED	REFUND	15.00	16.00	17.00	18	19	TESTED AND VERIFIED
<b>B. Under Implementation:</b>								
Sl. No	Description of energy efficiency improvement measure	Category	Investment(Rupees) estimated	Verified Savings(Rupees) estimated	Verified Energy Savings estimated	Units	Fuel	Status of Implementation

**Figure 96: Form 3 Print Format**

Form 1	Form A	Form B	Form D	Form 2	<b>Form 3</b>		
<b>Pending Verification</b>		Verified					
S.No.	DC Reg No	Designated Consumer Name	PAT Cycle	FORM 3	Order	Attachments	Action
1	IRN110	IRONSP113	PAT(S)2019-2022	<a href="#">View</a>   <a href="#">Print</a>	<b>Final</b>	DC EmAEA SDA	<a href="#">verify</a>

**Figure 97: Form 3 with Order status as Final**



**Notes:**

- ***Technical Officer (TO) to perform similar process to view and review Form 3 with 'Order' field status as 'Final'.***
- ***On verification of Form-3 record by Technical Officer (TO), an email notification will be sent to the SDA-Nodal Officer (NO) to Review/Verify specified Form 3.***
- ***Similar commenting process will be performed by SDA- Nodal Officer (NO) user.***
- ***On verification of Form-D by SDA- Nodal Officer (NO) user, the Form D record will be assigned to Sector Project Engineer or Sector Expert (SE) available for that sector in BEE.***



## 15. Reversal of comments by Nodal Officer

Login to the BEE portal with application **URL**, **Nodal Officer (NO) User Name**, and **Password**.

On Successful login the user is navigated to the SDA Dashboard page. Perform the following actions on the SDA Dashboard page to all the forms.

1. On the SDA Dashboard page select the **PAT Cycle** from the 'PAT Cycle' drop-down list and then click the **Search** button.

All the forms submitted for that PAT Cycle by DC/EmAEA are listed under respective Form's icon (1, A, B, D, 2 and 3) into different tabs such as 'Pending Verification', 'Verified' and 'Reversed' as shown in below image.

2. Click on **any Forms (A, B, C, D, 2, 3)**, and then click **Pending Verification** tab to view records related to the selected PAT cycle.
3. Click the **View** link to review the record.

S.No.	DC Reg No.	Designated Consumer Name	PAT Cycle	FORM A	Attachments	Action
1	DIS00168KA	ELECTRICITY DISCOM KARNATAKA DHARWAD	PAT(2)2016-2019	<a href="#">View</a>	DC EmAEA SDA	<a href="#">Verify</a>

**Figure 98: View Link**

4. Click on **Comment** button to enter the reversal comments.

**Declaration**

I/We undertake that the information supplied in this Performance Assessment Document is accurate to the best of my knowledge and if any of the information supplied is found to be incorrect and such information result into loss to the Central Government or State Government or any of the authority under them or any other person affected, I/we undertake to indemnify such loss. I/We agree to extend necessary assistance in case of any enquiry to be made in the matter.

[Prev](#) [Cancel](#) [Print](#) [Comment](#)



**Figure 99: Comments page**

5. Click on the comment's icon highlighted in below image to review the Technical officer comments.

The screenshot shows a dashboard with seven form icons labeled Form 1 through Form 3. Below the icons are three tabs: 'Pending Verification', 'Verified', and 'Reversed'. A table below the tabs has columns for S.No., DC Reg No., Designated Consumer Name, PAT Cycle, FORM A, Attachments, and Action. The first row of the table is highlighted, and the 'View' button in the FORM A column is enclosed in a red box.

S.No.	DC Reg No.	Designated Consumer Name	PAT Cycle	FORM A	Attachments	Action
1	DIS00168KA	ELECTRICITY DISCOM KARNATAKA DHARWAD	PAT(2)2016-2019	<a href="#">View</a>	DC EmAEA SDA	<a href="#">Verify</a>

**Figure 100: Comments Icon**

6. If comments are not proper provided by Technical Officer in the comments pop-up window then in that case Nodal Officer has privilege to reverse the Comments to Technical Officer.

The screenshot shows a 'COMMENTS' pop-up window. It has a blue header with the title 'COMMENTS' and a close button. Below the header, there are three fields: 'Name: R MAHESH', 'Designation: SDA-Technical Officer', and 'Date: 03-06-2021'. The 'Designation' field is highlighted with a red box. Below these fields is a text area containing the comment: 'TECHNICAL OFFICER REVIEWED AND UPDATED COMMENTS FOR FROM A', which is also highlighted with a red box.

**Figure 101: Comments Page**

7. Nodal Officer can review form and comments given by Technical Officer in the pop-up window when clicked on 'Comment' button. He/Shae can provide reversal comments and 'Reverse' the form.



The screenshot shows the 'FORM-A' interface for 'Energy Efficiency Project Implemented During Current Cycle'. A 'Comments' dialog box is open, allowing the user to write a comment. The dialog has a 'Reverse' button (highlighted with a red box) and a 'Submit' button. Below the dialog, there are buttons for 'Prev', 'Cancel', 'Print', and 'Comment' (also highlighted with a red box). The background table has columns: Project, Year Of Implementation, Annual Energy Savings in Lakh kWh, Annual Energy Saving in toe\*, Annual Energy Consumption (before) in Toe, Annual Energy Consumption (after) in Toe, Energy Cost (Rs. per Kwh/tie), and Investment (Rupees). The table shows a value of 1.00 for several columns.

Figure 102: Reverse Comments page

## 16. Updation of Comments by Technical Officer as suggested by Nodal Officer

Login to the BEE portal with application URL, **Technical Officer (TO) User Name**, and **Password**.

On Successful login the user is navigated to the SDA Dashboard page. Perform the following actions on the SDA Dashboard page to all the forms.

1. On the SDA Dashboard page select the **PAT Cycle** from the 'PAT Cycle' drop-down list and then click the **Search** button.
2. Click on **any Forms (A, B, C, D, 2, 3)**, and then click **Verified tab**, to view the records related to the selected PAT cycle.

The screenshot shows the 'Verified Records Page' on the SDA Dashboard. At the top, there is a 'PAT Cycle' dropdown menu set to 'PAT(2)2016-2019' and a 'Search' button. Below this, there are icons for 'Form 1', 'Form A' (highlighted), 'Form B', 'Form C', 'Form D', 'Form 2', and 'Form 3'. Below the icons, there are tabs for 'Pending Verification', 'Verified' (highlighted), and 'Reversed'. Below the tabs is a table with the following data:

S.No.	DC Reg No.	Designated Consumer Name	PAT Cycle	FORM A	Attachments
1	DIS00169KA	ELECTRICITY DISCOM KARNATAKA BIDAR	PAT(2)2016-2019	<a href="#">View</a>	DC EmAEA SDA

Figure 103: Verified Records Page



On click of 'Comments' button, comments pop-up window will be presented where Technical Officer can see the reversal comments provided by the Nodal Officer.

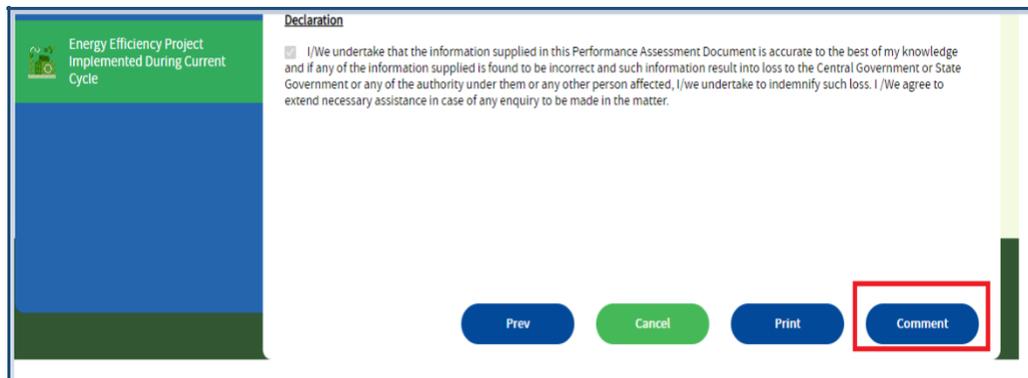


**Figure 104: Comments Icon**



**Figure 105: Comments Page**

3. Technical Officer can enter comments suggested by Nodal Officer in the pop up window when clicked on 'Comment' button.



**Figure 106: Comments Button**



Comments

Updated the comments suggested by nodal officer

Submit

**Figure 107: Comments Submit Button**

- 4. Nodal Officer can see the latest comments provided by the Technical Officer.

COMMENTS

Name: R MAHESH Designation: SDA-Technical Officer Date: 03-06-2021

UPDATED COMMENTS SUGGESTED BY NODAL OFFICER

Name: HANUMANTHARAYAPPA Designation: SDA-Nodal Officer Date: 03-06-2021

PLEASE PROVIDE PROPER COMMENTS

Name: R MAHESH Designation: SDA-Technical Officer Date: 03-06-2021

TECHNICAL OFFICER REVIEWED AND UPDATED COMMENTS FOR FROM A

**Figure 108: Comments Page**