



# CPS Energy Customer Engineering Web Portal

## Frequently Asked Questions (FAQ's)

### **Registration Questions –**

**1. Who uses the Customer Engineering Web Portal?**

The portal is for any customer involved with construction services who would have a need to coordinate with CPS Energy for electric and gas services within their projects. Customers are: General Contractors, Builders, Project Managers, Developers, Engineering Firms, Electricians, Plumbers and residential owners.

**2. What is the purpose of the Customer Engineering Web Portal?**

The portal is an information transfer and communication application to provide visibility and transparency between CPS Energy and our customers. The portal allows our customers 24/7 access to submit applications, view and update project status, share drawings and other attachments and to receive notifications as updates are made by CPS Energy.

**3. How do I access the Web Portal to register?**

1. Complete the Online Form: <https://secure.cpsenergy.com/customereng/>
2. Request an application by email: [csiwebaccess@cpsenergy.com](mailto:csiwebaccess@cpsenergy.com)

**4. What information is needed from me when I register?**

- a. Your Business/Customer Name
- b. Your Portal User Name of choice
- c. Your Valid Email Address
- d. Your Phone Number
- e. Your Mailing Address
- f. Your Account Billing Address
- g. Your Existing Billing Account Identification Number (if applicable)
- h. If opening a new account, you will need to provide:
  - i. Federal Tax ID *or*
  - ii. EIN (Employer Identification Number) *or*
  - iii. Social Security Number (SSN)/ Individual Taxpayer Identification Number (ITIN)

**5. How long does it take to receive access to the Customer Engineering Web Portal after submission of request?**

The enrollment process has a 24-48 hour time frame for completion (dependent upon all enrollment information being validated by CPS Energy).

**6. If I am a Subcontractor for a client, will I still need to enroll?**

Yes. A client can provide permission to a Subcontractor to create, view, and update projects on their behalf. Download a copy of the CPS Energy Web Portal Authorization Form from our CSI Web Portal page: (<https://secure.cpsenergy.com/customereng/index.jsp>)

## **Portal Usage Questions -**

### **1. Is a reference guide available?**

Yes, please download a copy of the CPS Energy Customer Web Portal User Guide from our CSI Web Portal page: <https://secure.cpsenergy.com/customereng/index.jsp>

### **2. What should I do if I forgot my password or username?**

If the account is set up under your own personal username and password, navigate to the Login webpage and click on the “Forgot Username/Password?” link located below the “SIGN IN” button. This will trigger a prompt to reset your password. If the username is unknown, call the CSI help team to identify your username (210-353-2450). Once your username is entered, proceed with creating a new password.

If the account is set up with the company/organization sharing one general username and password with all employees, you will need to contact your company’s administrator on the account. The administrator on file is the only person who can request to “Reset Password”. If unknown, call the CSI help team to identify your administrator (210-353-2450).

### **3. Why am I not able to access the web portal when I log in?**

You may have been enrolled in the old web portal prior to August 14, 2017 and are using old credentials. You will need to re-enroll for access to the new Customer Engineering Web Portal.

You may be trying to login by way of an outdated portal link. Access the portal by this link: <https://secure.cpsenergy.com/customereng>. If an error message is again received, please provide a screenshot/print screen of the error message to help identify the issue at a faster pace, along with your contact information so that the assigned analyst will be able to contact you directly for additional information to resolve issue.

Your internet browser settings may need to be adjusted for optimum usage of portal features. Email [csiwebaccess@cpsenergy.com](mailto:csiwebaccess@cpsenergy.com) or call (210) 353-2450 for assistance.

### **4. Why can I not find or see my project when I log in?**

Your project may be pending initiation behind the scenes at CPS Energy. Please wait up to 48 hours for addressing and account creation to be completed.

You may have many projects within your Overview page. Use the Search function at the top of the page to locate your project.

### **5. Why do I have to create a separate temporary service project or temporary address separate from my “permanent” project for my Residential Service projects?**

Residential requests for temporary services are separate from permanent service requests. The service types have different requirements, are managed through different channels, and have separate closing processes (even when at the same location). By associating permanent services to one project and temporary services to another, both

the customer and CPS Energy can streamline tasks between the work orders more efficiently.

**6. Why is the “Add Gas Services” box/circle is is greyed out for my permanent project service option?**

Gas selection will be greyed out as a service option if gas had not as yet been associated to the address in question. This issue does come up when subdivisions are not fully updated within our system during the initial address input, but it is an issue we are working to resolve.

The gas option may also be greyed out if it was not selected as a need at the time an Electric order was created. Please call Customer Engineering at (210) 353-4050 to resolve.

**7. Why does selecting Site Ready on my electric order not update the Site Ready status on the gas order at the same time for the same location?**

Simultaneous updating is not yet an automated or linked function and each order must be updated individually. We are working to improve this feature in the future.

**8. How do I update a task?**

Tasks can be updated at the Project and the Work Request levels.

- a. At the Project level, select the project you wish to update and Click on the Project Tasks tab. Select the Update Task button (if available) and update Task status from the drop down menu.
- b. At the Work Request level, select the project you wish to update and click on the Work Requests tab. Click on the View Work Request button and select the Tasks tab to view associated tasks. Click the Complete Task button (if available).

You may not be able to see an update button if preceding tasks have not been completed, if you are a pre-pay customer or if your previous request for inspection or meter set was turned down. Contact Customer Engineering at (210) 353-4050 to proceed.

**9. Why has my project surpassed my Need By Date without a call from CPS Energy?**

Once a project is created, review your Site Ready dates and recalculate if necessary. Please note these scheduling guidelines when submitting your application:

Temporary Install: 5-6 days

Gas Rough-In Inspection: 3-5 days after order is Authorized

Meter Set: 5-6 days after order is Authorized

Underground Trenching: 15 days (Accelerated Work Requests only)

All timeframes are estimated as weather permitting. Please note that permits must be released, inspections passed and preceding tasks completed before schedules will be progressed.

**10. How do I determine the status of my Project or Work Request?**

If a Project is delayed, the reason will appear under the “My Tasks” section of the Project Task tab. It is only updateable by CPS.

Construction Status, Crew Information and estimated Start/Completion Dates can be located within the Work Request Overview tab.

Delay and Turndown Notification will be found in the Work Request Tasks tab. Email will be sent to the Contact of record (*if opted in for notifications*) and additional information will be located in the Comments section of the Work Request.

**NOTE:** All Turndowns require a call to Customer Engineering (210-353-4050) to confirm issues are resolved and to restart the project or task.

**11. When I have red tagged meters, can I request they be turned on through the portal?**

No. You must call Customer Engineering at 210-353-4050. Customer Engineering will energize once they confirm permits are cleared and preceding tasks are complete.

**12. Can I share documents with CPS Energy through the portal?**

Yes. You can upload documents as attachments to your projects. Also, as part of our Phase 3 initiative, the CPS Web Portal will interface with the City of San Antonio website to provide customers access to city-issued permits and related information.

**13. Can I communicate with CPS Energy through the portal?**

Yes. You can ask questions or notify CPS Energy of updates and document uploads by adding Comments to your project.

**14. Can I access the portal through a mobile device?**

This feature is not fully optimized for all mobile devices at this time but is under consideration for our Phase 3 initiative for release in 2019.

**15. Can I make payment through the portal?**

Not yet. This feature is currently in development as part of our Phase 3 initiative for release in 2019.

**16. Is training available?**

Training is available by request and can be conducted at the customer’s location or at a CPS Energy facility. Please email: [CSIWebAccess@cpsenergy.com](mailto:CSIWebAccess@cpsenergy.com) or call (210) 353-2450 for a training Request Form.

**Please contact Customer Service Improvement (CSI) for Web Portal assistance**

**(210) 353-2450**

**[csiwebaccess@cpsenergy.com](mailto:csiwebaccess@cpsenergy.com)**