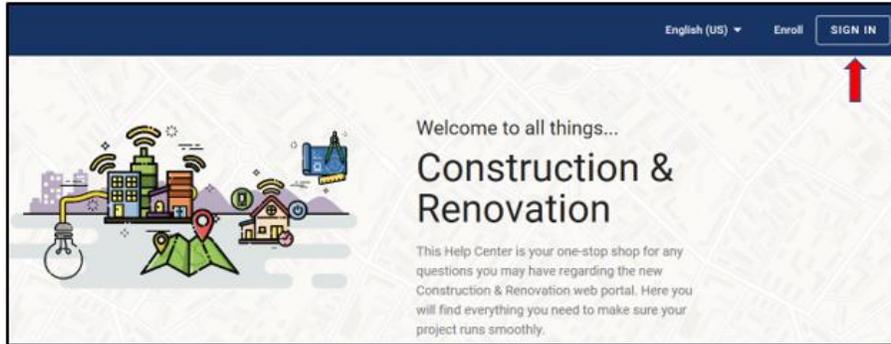


UPDATE A TASK

1. Open your internet web browser.
2. In the address bar, type in <https://secure.cpsenergy.com/crportal/#/>
3. Click **SIGN IN** located in the top right corner of the page.



4. Enter your **Account ID** and click **NEXT**.

The screenshot shows the 'Sign in' page with the CPS Energy logo. The text reads: 'Sign in Use your CPS Energy Account ID'. There is a text input field labeled 'Enter your Account ID' with a red border. Below the field are links for 'Forgot your account ID?' and 'Enroll'. At the bottom right, there are 'CANCEL' and 'NEXT' buttons, with a red arrow pointing to the 'NEXT' button. The footer includes 'English (US)' and 'Help'.

5. Enter your **password** and click **NEXT**.

The screenshot shows the password entry page with the CPS Energy logo. The text reads: 'Hi JANE DOE' and 'MIALEJANDRO@CPSENERGY.COM'. There is a text input field labeled 'Enter your password' with a red border and a password toggle icon. Below the field are links for 'Forgot password?' and buttons for 'BACK' and 'NEXT', with a red arrow pointing to the 'NEXT' button. The footer includes 'English (US)' and 'Help'.

6. Select the project you want to update a task under a company/user.

The screenshot shows a 'Projects' interface with search filters for Start Date (2020-12-09), End Date (2021-01-06), and Status (Open). Below the filters are checkboxes for users: SCOTTY GREEN: 22578 and PEGGY J SCOTT: 22577. A search button is on the right. The project list includes PEGGY J SCOTT, SAIFUL H SARKAR, and BUILDING HOME. A red box highlights a project card for 'Residential Service - New Accelerated' with the title 'Testing for script' and address '123 Happy Street SAN ANTONIO, TX 78210'. The status is 'Application Pending' with ID '#108568'.

7. If you would like to update a task for a **Project**, click the project card.

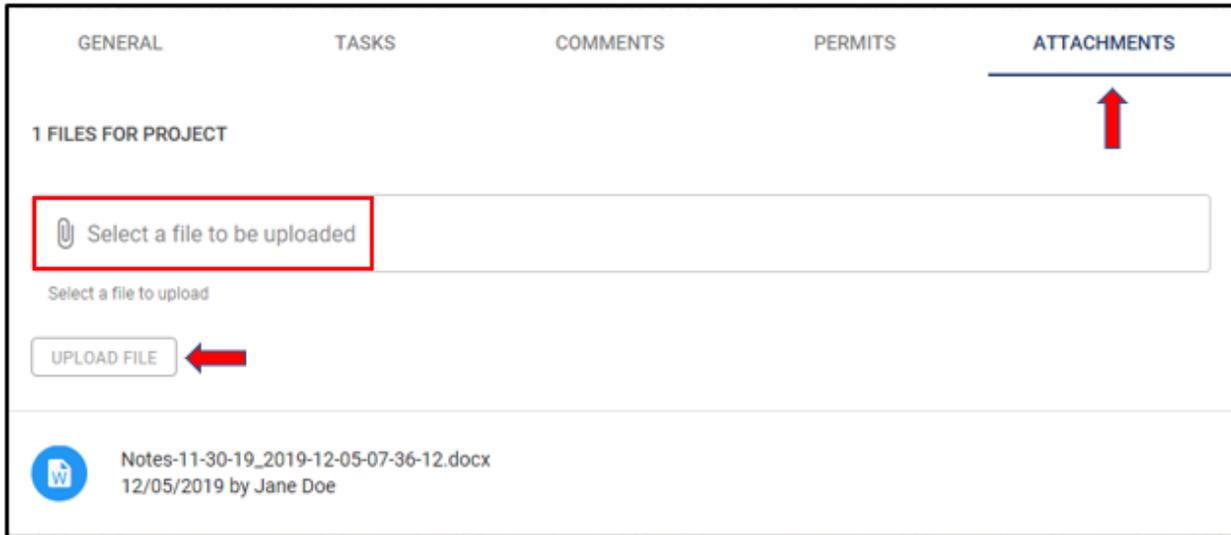
The screenshot shows the 'PRIMARY ACTIVITIES' section with the text: 'The details displayed on the actions, comments, files and permits tabs represents the specifics on the project.' Below this is a summary bar with three items: 'Project Number #108568', 'Project Status Application Pending', and 'Customer Project requiring action' with a red notification icon. A green checkmark is visible on the right side of the bar.

8. In the menu bar underneath the work request cards, click **TASKS**.

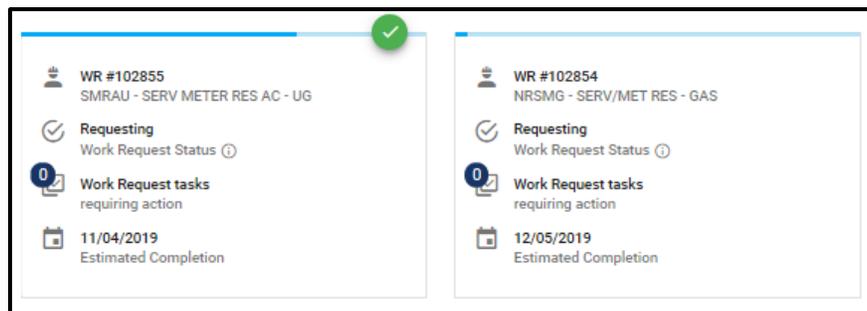
9. Notice the list of tasks which reflect documents CPS Energy needs to progress your project request.

The screenshot shows the 'TASKS' tab in a project view. The menu bar includes GENERAL, TASKS, COMMENTS, PERMITS, and FILES/ATTACHMENTS. The task list is titled '11 TASKS FOR PROJECT' and includes: 'Provide Streetlight Letter' (In-Progress), 'Provide Roll Plans' (Not Started), 'Provide Site Plan' (Not Started), 'Provide Plat' (Not Started), and 'Provide Utility Plans' (Not Started). Each task has a 'MARK COMPLETE' button. A red arrow points to the 'Provide Site Plan' task. Summary statistics show '5 Customer' and '6 CPS Energy'.

10. Once a document is ready to submit, Click **ATTACHMENTS** on the menu.
11. Click **Select a file to be uploaded** in the text box, to the right of the **paperclip** icon. Once you have chosen your file and clicked **Open**, in the file navigation window, click **Upload File**.



12. If you would like to update a task for a **Work Request**, click the appropriate work request card.

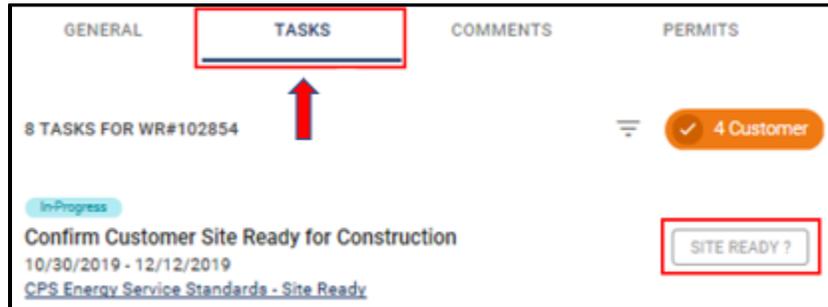


Please Note:

A green checkmark appears in the top right corner of whichever card is currently selected.

**** All cards and options are specific to the object with the green checkmark. ****

13. Beneath the project and work request cards, you will find a menu bar with multiple tabs. Click the **TASKS** tab on the menu bar.
14. For those projects and work requests which have tasks assigned, there will be an **Action Button** to the right of the task header (i.e. **SITE READY ?**) This example is for a **Site Ready** action for a **Work Request**:



15. For site tasks (i.e. Site Ready or Gas Rough-In Inspections) a checklist will display with steps to complete before a successful inspection can take place. These checklists will include a **Completion Button** (i.e. **Confirm Site Is Ready**) to be pressed when all actions on the checklist are complete. This example is for a Site Ready inspection.

Site Ready Acknowledgement

Please confirm the following

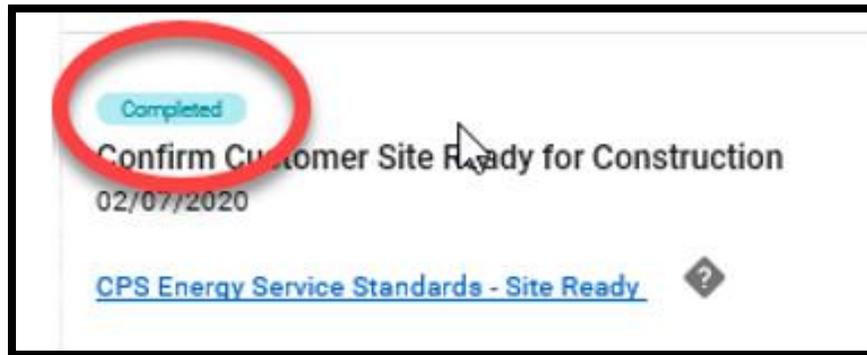
- Install all equipment in compliance with [CPS Energy Service Standards - Site Ready \[Underground Service\]](#).
- If you are digging your own trench, ensure it complies with Trench Design section of the document.
- Ensure the grade along the underground service route is within 6 inches of final grade.
- Securely mounted electric meter loop and meter can on the structure's wall.
- Stub gas structure pipe out 26 inches above final grade.
- If you are installing gas service, ensure your home interior lines and appliances are ready for either your city's Gas Inspection or CPS Energy's Gas Rough-in Inspection, depending on your location.

In addition to infrastructure preparation, ensure that you:

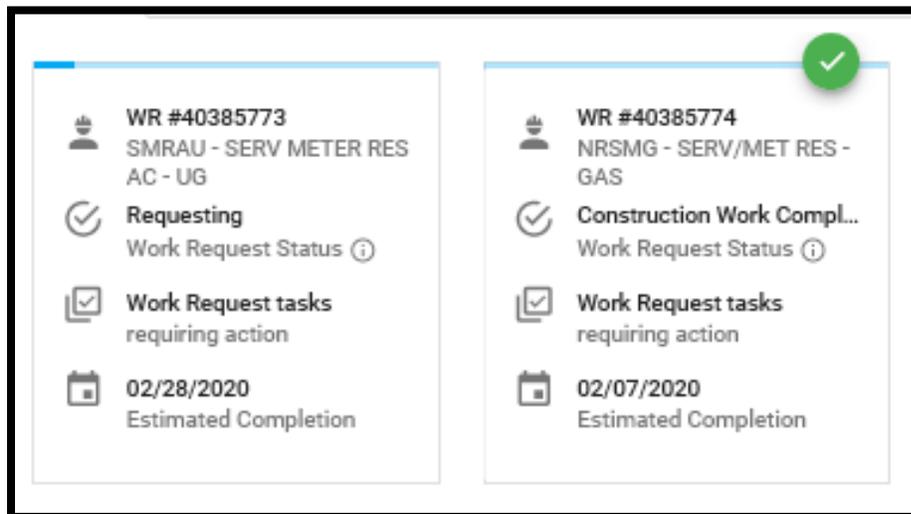
- Clear the service location of all water and drain lines, and underground facilities; including septic systems, culverts, irrigation systems, underground wiring, and other impediments.
- Clear all obstructions and/or debris from cable, gas, transformer, secondary enclosure, and meter location route.
- Sign and return any required easements to CPS Energy.

 **Confirm Site Is Ready**

16. The task status will change to Completed:



17. If the electric and gas are in the same trench, repeat the same steps for the corresponding Work Request:



Please Note:

Results or responses to task updates may vary depending on the project type and/or task type.