

QUICK REFERENCE GUIDE FOR SERVICE PROVIDERS

MULTIFAMILY

PROGRAM PARTICIPATION

- SP requests and submits program application in service provider portal
- Status of submitted application will be known from *My Applications* tab in the home dashboard
- PM reviews and approves program participation
- Email notification sent to SP upon application approval

PROJECT CREATION

PHASE: IA OPEN (INITIAL APPLICATION)

- SP creates project
 - » Add multiple sites
 - » Add the implemented measures for the added site
 - » Upload required support documents related to measures added
 - » E-sign/wet sign the host customer agreement and tenant income eligibility certificate
 - » Review and submit project
- PM reviews the project and sends it for pre-inspection
- Once pre-inspection is completed, PM reviews the inspection results and approves the project
- Email sent to SP with a link to e-sign the multifamily addendum document
- Upon completion of signatures by SP and Oncor, project moves to installation phase

PHASE: IN OPEN (INSTALLATION NOTICE)

- Upon PM approval, project moves to **Installation Notice (IN)** phase from **IA** phase
 - » SP may update the measures if there are any changes
 - » E-sign the production summary report
 - » Review and submit project
- PM sends the project for post-inspection

PHASE: IN APPROVED

- PM reviews the inspection results and approves the project
- Approved incentive amount paid to SP

WORKFLOW SUMMARY

1 SUBMIT PROGRAM APPLICATION

2 PM APPROVES APPLICATION

PROJECT CREATION

PHASE: IA OPEN

1. Create project
2. Add sites & measures
3. Upload required support documents
4. E-sign/wet sign host customer agreement & income eligibility
5. Submit project

PROJECT SENT FOR PRE-INSPECTION

4 PHASE: IA PRE-INSPECTION

1. PM review the inspection results and approves the project

PM APPROVES

5 PHASE: IA AWAITING SIGNATURE

1. E-sign the Multifamily addendum document by clicking on the link sent via mail
2. On completion of Oncor signature project moves to installation phase

6 PHASE: IN OPEN

1. Update the measure data if any
2. Upload signed production summary sheet & host customer agreement

PROJECT SENT FOR POST-INSPECTION

7 PHASE: IN POST-INSPECTION

- PM reviews and approve project after inspection

PM APPROVES

8 PHASE: IN APPROVED

- PM approves project for payment

9 Payment made to Service Provider

SP - Service Provider PM - Program Manager

