

QUICK REFERENCE GUIDE FOR SERVICE PROVIDERS

SOLAR

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 sites
 - » Add inverter and solar PV array
 - » Upload required support documents
 - » If the e-sign option is selected for host customer agreement, project moves to submitted when SP and customer complete their signatures
 - » If the wet sign option is selected, upload the signed agreement and manually submit the project

PHASE: FA OPEN (FINAL APPLICATION)

- Upon PM approval, project moves to **Final Application (FA)** phase from **IA** phase
 - » SP may add or update the inverter/PV array data
 - » Upload documents related to measure added like specification, design document, etc.
 - » Review and submit project
- PM approves the project. SP receives an email to e-sign the reservation of funds addendum.
- Upon completion of signatures by SP and Oncor, project moves to IN phase

PHASE: IN OPEN (INSTALLATION NOTICE)

- Upon PM approval, project moves to **Installation Notice (IN)** phase
 - » Upload final customer invoice showing project cost, required photographs, shading study document and interconnection/permission to operate if available (if not available, it can be submitted with savings report)
 - » If the e-sign option is selected for the installation certification notice, project moves to submitted when SP and customer complete their e-signatures
 - » If the wet sign option is selected, upload the signed installation notice and manually submit the project
 - » Review and submit project
- PM sends the project for post-inspection
- PM reviews the inspection results and approves the project

PHASE: SR OPEN (SAVINGS REPORT)

- Upon PM approval, project moves to **Savings Report (SR)** phase
 - » SP either e-signs or wet signs the savings report, and submits the project and interconnection/permission to operate (if not previously attached)
- PM reviews the document and approves the project for final payment
- 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 & inverter with connected PV
3. Upload support documents
4. E-sign/wet sign host customer agreement
5. Submit project

PM APPROVES

PHASE: FA OPEN

4. 1. Update inverter / PV array data if there is a change
2. Upload required documents
3. Submit Project

PM APPROVES

5 PHASE: FA AWAITING SIGNATURE

5. 1. E-sign reservation of funds document received in email

FA APPROVED

PHASE: IN OPEN

6. 1. Upload invoice of the project, photographs, shading study document & e-sign/wet sign installation notice customer certification
2. Submit Project

PROJECT SENT FOR POST-INSPECTION

7 PHASE: IN POST-INSPECTION

7. PM reviews and approve project after inspection

PM APPROVES

8 PHASE: SR OPEN

8. 1. Upload signed Savings report & executed interconnection agreement
2. Submit Project

9 PHASE: SR APPROVED

Payment made to Service Provider

