QUICK REFERENCE GUIDE FOR SERVICE PROVIDERS

RESIDENTIAL

PROGRAM PARTICIPATION

- SP requests and submits program application in the 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

CUSTOMER SITE CREATION

- SP creates sites under *Open Customers* tab
  - » Add multiple sites
  - » Get the customer's e-signature on the host customer agreement online template available in site images
  - » Add the implemented measures for the added site

PHASE: IN OPEN (INSTILLATION NOTICE)

- Create a new project
  - » Close the customer sites created to the project
  - » Review the added sites and measures. If a site needs to be excluded from the project, click the "Exclude" button. Selected site will be released from the project.
  - » Click on the production report hyperlink to e-sign and attach the report in Upload Documents tab
  - » Review and submit project

PHASE: IN SUBMITTED

- PM reviews the project and sends it for inspection

PHASE: IN POST-INSPECTION

- Inspector visits the site and performs inspection for the sampled sites
- Submit the inspection results and return the project back to PM

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

3 CREATE CUSTOMERS
1. Create Sites
2. Add implemented measures
3. Attach the signed host customer agreement for each site added using the online template from site images
4. Repeat the steps to add multiple sites and measures

CLOSE CUSTOMERS

4 PHASE: IN OPEN
1. Create a project
2. Close customers to the Project
3. Review the added customer & measures
4. E-sign the Production summary report from upload documents tab
5. Review and Submit the project

5 PHASE: IN SUBMITTED
PM reviews the project and send for inspection

PROJECT SENT FOR INSPECTION

6 PHASE: IN POST-INSPECTION
1. Inspector visits the site and submit the inspection results to PM

7 PHASE: IN APPROVED
PM reviews the inspection results and approves project for payment

9 Payment made to Service Provider

SP – Service Provider   PM – Program Manager

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ENERGY EFFICIENCY PROGRAM