

## 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

