

GoGreen Home Portal Lender User Manual

Use this Lender User Manual to begin using the GoGreen Home Portal quickly and effectively.

What is the GoGreen Home Portal?

The GoGreen Home Portal is the online tool through which you will submit loan and Borrower data to the GoGreen Home Team for review and enrollment.

This User Manual covers the activities that Lenders will perform.

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GoGreen Home Portal – Quick Start Guide

There are nine stages to submitting a project to GoGreen Home. The full process requires participation from Contractors, Lenders, and the GoGreen Home Team. **There are two stages which require Lender engagement and entry, highlighted in blue below.**

1	2	3	4	5	6	7		9
Draft	Awaiting Customer Action	Project Pending Approval	Docs Pending Approval	Loan Preapproval	Pending Completion	Completion Documentation	Loan Closing	Completed

Stag	ge	Action	Responsible Party
1.	Draft	Contractor enters project details: customer address, utility provider(s), Eligible Energy Measures (EEMs), Lender information, project costs and financed amounts. Utility bill(s) are uploaded at this stage by either the Contractor or the Customer, and the Contractor sends the Privacy Release to the Borrower for signature.	Contractor
2.	Awaiting Customer Action	Customer signs Privacy Release virtually.	Borrower
3.	Project Pending Approval	GoGreen Home Team reviews submitted project details.	GoGreen Home Team
4.	Docs Pending Approval	GoGreen Home Team reviews submitted project documentation (e.g. utility bills).	GoGreen Home Team
5.	Loan Preapproval	Lender enters initial loan details: Loan Amount / Prequalified Amount, Loan Application Number, and Interest Rate Finalized Date.	Lender
6.	Pending Completion	Contractor starts project. Upon project completion, Contractor and Borrower digitally sign Certificates of Completion; if applicable, Contractor uploads additional required documentation such as permits, safety test results, and/or proof of Interconnection Application.	Contractor, Borrower
7.	Completion Documentation	The GoGreen Home Team reviews and approves the Completion Documentation, and then signals the Lender to close the loan and send payment to the Contractor.	GoGreen Home Team
8.	Loan Closing	Lender enters remaining loan details (such as the loan term, the interest rate, the final principal and Claim-Eligible Principal Amounts, Borrower credit score and DTI, and the loan's closing date). Then the Lender changes the Loan Status field to "In repayment".	Lender
9.	Completed	The Loan and Project records are sent to GoGreen Home for final enrollment.	Lender

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Navigating the GoGreen Home Portal

When you log in to your GoGreen Home Portal Account, you will note a variety of tabs at the top of the page:

go green	Dashboard Loans Jobs Contractors	Discussions Loan Files Reports Resources	Upload Loan File Efficiency Credit Union 🤌 Janice Lim 🔻
Dashboard			mm/dd/yyyy 🗅 to mm/dd/yyyy 🗅 Update
En	nergency Replacements O	Awaiting Customer Action	Project Pending Approval O

- **Dashboard**: Displays and links to a list of Job records based on status for easy navigation.
- Loans: Displays a list of all Loan records associated with the Lender account.
- **Jobs**: Displays a list of all Job records associated with the Lender account.
- **Contractors**: Displays a list of all Contractor accounts who have Job records associated with the Lender account.
- **Discussion**: Displays a list of messages to which the Lender account is a party.
- Loan Files: Displays a list of uploaded loan files and their statuses.
- **Reports**: Links to some basic reports for Lenders.
- **Resources**: Includes links and documents uploaded by the GoGreen Home Team for Contractors and Lenders.

Other noteworthy features:

- Upload Loan File please ignore for now; this feature will be introduced at a later stage.
- "Bell" icon links to a list of notifications for the Lender account.
- [Your User Name] use this button to update your user profile information, add more user accounts (Admin users only) and update notification preferences.

	Notification Preferences
~	A closing date is required for a loan
	Document request sent to a customer
	A customer digitally signed a certificate of completion
	A new discussion message is added to a job
	A job has changed to the approved final funds status
	A job status changed. Only triggered if there is not a more specific job status system notification type
	A job has changed to the completed status
~	Lender reminder to upload latest data, reminders sent every 2 days.
	A loan import was processed
Upo	Jate My Profile



Adding a Loan to a Project (Stage 4 – "Loan Preapproval")

Contractors must link a Job record to a Lender in order to submit the project for review. Once the Contractor has submitted a Job record into the system, it will appear in the Lender's **Jobs** tab.

🌍 go g	reen	Dashboard	Loans	Jobs (Contractors	Discussions	Loan Files	Reports	Resources	Upload	Loan File	Efficiency Credit Union	🌲 Janice Lim 🔻	
Jobs														
Keyword								Status						
Loan #, jok	b #, addı	ress, <mark>k</mark> eyword	s, etc					All				~	Search Reset	:
Job #	Loan	#	Contr	actor		Custom	er		Address	City	Zip	Job Status	Loan Status	
100072			XYZ C	ontractor	Company	Custom	er Joe Gome	ez	111 W State Street	Sacramento	95815	Docs Pending Approval		
100073			XYZ C	ontractor	Company	Custom	er Tamara G	reen	222 West Street	Sacramento	94524	Loan Preapproval		

Lenders can start adding loan information if a Job record has a Job Status of "Loan Preapproval".

The "Loan Preapproval" status means that a Job record has been reviewed and approved by the GoGreen Home Team; after this stage, the only thing holding the Contractor from starting installation is the Lender's initial loan data entry.

Adding a Loan Record

From the **Jobs** tab, click the **Job #** of the record you want to add loan information for. You'll notice that there is no **Loan #** for the record yet.

Job #	Loan #	Contractor	Customer	Address	City	Zip	Job Status	Loan Status
100072	_	XYZ Contractor Company	Customer Joe Gomez	111 W State Street	Sacramento	95815	Docs Pending Approval	
100073		XYZ Contractor Company	Customer Tamara Green	222 West Street	Sacramento	94524	Loan Preapproval	

Upon clicking the Job #, you will be taken to the Job record. Click the record's **Loan** tab.





On the **Create Loan** page, and enter the required information (**Loan Amount/Prequalified Amount**, **Loan Application Number**, and **Interest Rate Finalized Date**). When you are finished, click the **Create Loan** button at the bottom of the page.

Create Loan for 222 West Street - Customer	Tamara Green Job #100073 GoGreen	
Loan Job Certificates of Completion Discussion		
Borrower Name	Borrower Address 1	Borrower Address 2
Customer Tamara Green	222 West Street	
Borrower City .*	Borrower State *	Borrower ZIP *
Sacramento	California	94524
Loan Amount / Prequalified Amount *	Loan Application Number *	Interest Rate Finalized Date *
\$ 19,500.00	# 5643	07/15/2024
Loan Officer (Name) Lender notes	must be unique	
Create Loan		

A new page with more Loan data fields will generate; you should skip this page for now and instead navigate back to the **Loans** tab where you will now see the Loan record for this Job. The Loan Status will now be set as "Preapproval" and the Job Status will now be set to "Pending Completion", letting the Contractor know that they can start the installation.

go green	Dashboa	rd Loans Jobs Contractor	s Discussions Loan Files I	Reports Resources				Uplo	ad Loan File	Efficiency Cred	lit Union 🏼 🔎	Janice Lim 💌
Loans Keyword				2	itatus							
Loan #, job #, add	dress, keywo	ords, etc			All						✓ S	earch Reset
Loan #	Job #	Contractor	Customer	Address	City	Zip	Job Status	Loan Status	Job Cost	Financed	Disbursed	Remaining
5643	100073	XYZ Contractor Company	Customer Tamara Green	222 West Street	Sacramento	94524	Pending Completion	Preapproval	\$19,500.00	\$19,500.00	\$0.00 (0%)	\$19,500.00
575656565656	100071	XYZ Contractor Company	Kelly Delaney	901 P Street	Sacramento	95814	Completed	In Repayment	\$12.800.00	\$12.800.00	\$0.00 (0%)	\$12.800.00

What Happens Next?

The Contractor will begin and complete the work, and then sign the Contractor Certificate of Completion and upload other required documentation (permits, safety test results, etc). The Contractor will also trigger the Borrower Form (referred to within the GoGreen Home Portal as the "Borrower Certificate of Completion") to be sent to the Customer for virtual signature. The GoGreen Home Team will then review the submitted documentation and, if everything is complete and in good order, will approve the project for final funding. The Lender will automatically receive an email notification and the Job Status will change to "Loan Closing".

	gogreen	Dashboar	rd Loans Jobs Contractors	Discussions Loan Files Rep	ports Resource	S			Up	load Loan File	Efficiency Cre	dit Union 🏼 🔎	Janice Lim 🔻
	Loans Keyword					Status							
	Loan #, job #, add	ress, keywo	rds, etc			All						¥ 9	iearch Reset
	Loan #	Job #	Contractor	Customer	Address	City	Zip	Job Status	Loan Status	Job Cost	Financed	Disbursed	Remaining
	5643	100073	XYZ Contractor Company	Customer Tamara Green	222 West Stre	et Sacramento	94524	Loan Closing	Preapproval	\$19,500.00	\$19,500.00	\$0.00 (0%)	\$19,500.00
L	575656565656	100071	XYZ Contractor Company	Kelly Delanev	901 P Street	Sacramento	95814	Completed	In Repayment	\$12,800.00	\$12,800.00	\$0.00 (0%)	\$12,800.00



Final Funding (Stage 8 – "Loan Closing")

At this stage, the project has been reviewed and approved by the GoGreen Home Team and the Lender can close and originate the loan.

From the main Loans page, click the **Loan #** to access the final loan data entry page. Fill in all the required fields. When you are finished, change the **Loan Status** field to **In Repayment**. At the bottom of the page, click **Update Loan**.

22 West Street - Customer	r Tamara Green Job #100073	reen	
Loan Job Certificates of Completion	Discussion		
Loan Number/ID	Application Number/ID	Loan Status	
	5643	In Repayment 🗸	
Must be unique within each lender	Must be unique within each lender	Draft	
Principal Amount / Original Balance	Current Balance	In Repayment Interest Rate (%)	
\$ 19,500.00	\$	Denied	%
Claim-Eligible Amount	Loan Officer (Name)		
\$			
Dates			
Interest Rate Finalized Date	Closing Date		
	-		

The Loan Status will now display as "In Repayment" and the Job Status will show as "Completed" back on the main Loans page.

Last Step - GoGreen Home Enrollment ("Completed")

Once the Job Status shows "Completed" and the Loan Status is "In Repayment", the GoGreen Home Team will download the loan and project data, conduct a final check, and then begin the process of generating funding memos.