GoGreen Home Portal

Contractor User Manual

What is the GoGreen Home Portal?

The GoGreen Home Portal is the tool through which you will submit project and property data for review and enrollment. This User Manual covers how to navigate the Portal and submit projects (known as "Jobs" in the Portal).

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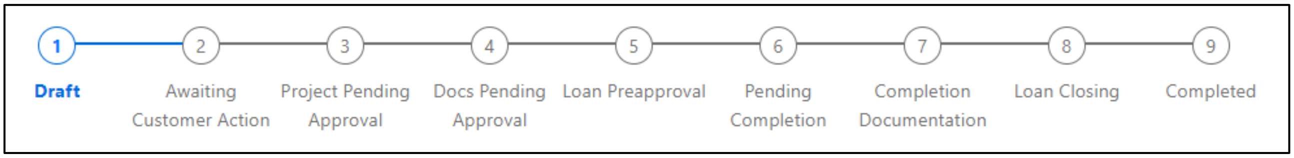
Log In: https://gogreenportal.treasurer.ca.gov/users/sign_in

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. **The stages which specifically require Contractor engagement and data entry are highlighted in blue below.**



Stage	Action	Responsible Party
1. Draft	Contractor enters project details: Borrower 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 Borrower, and the Contractor sends the Privacy Release to the Borrower for signature.	Contractor
2. Awaiting Borrower Action	Borrower 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.	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 and changes the Loan Status to “In repayment”.	Lender
9. Completed	The Loan and Project records are sent to GoGreen Home for final enrollment.	Lender

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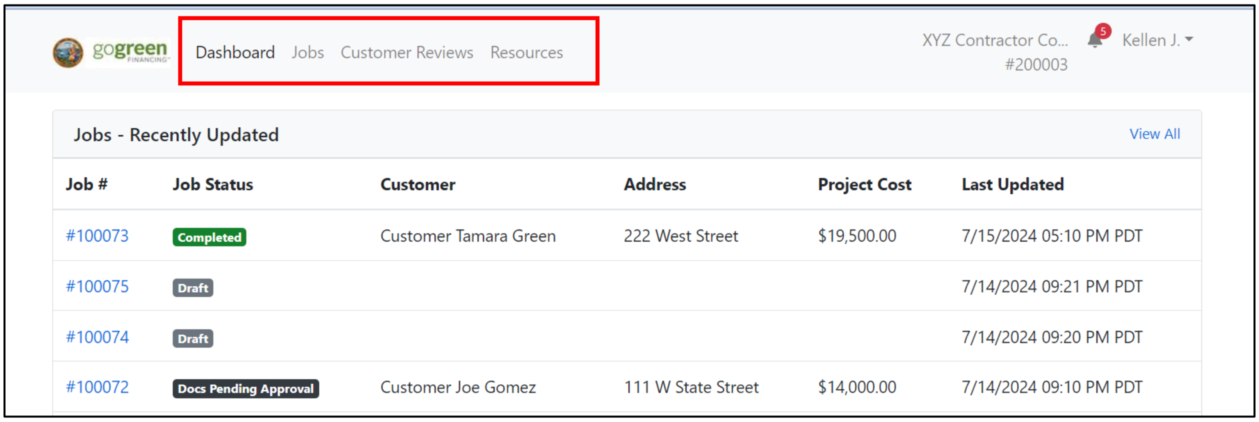
Navigating the GoGreen Home Portal

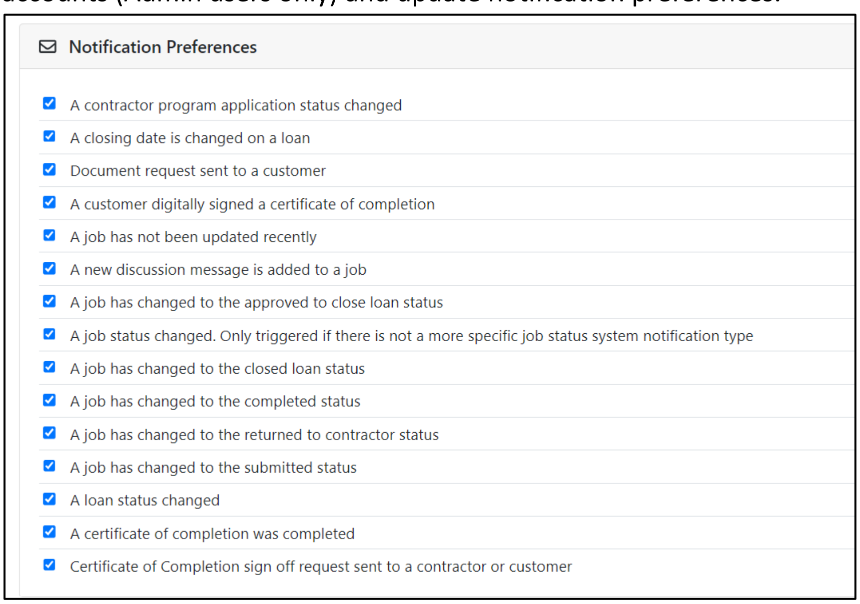
When you log in to your GoGreen Home Portal Account, you will see a variety of tabs at the top of the page:



- **Dashboard**: Displays a basic list of Job records associated with the Contractor account. At the bottom of this page is the **Discussion** section, which displays a list of messages to which the Contractor account is a party.
- **Jobs**: Displays a more detailed list of all Job records associated with the Contractor account.
- **Borrower Reviews**: This feature has not been turned on. No action is needed on your part.
- **Resources**: Includes links and documents uploaded by the GoGreen Home Team for Contractors and Lenders.

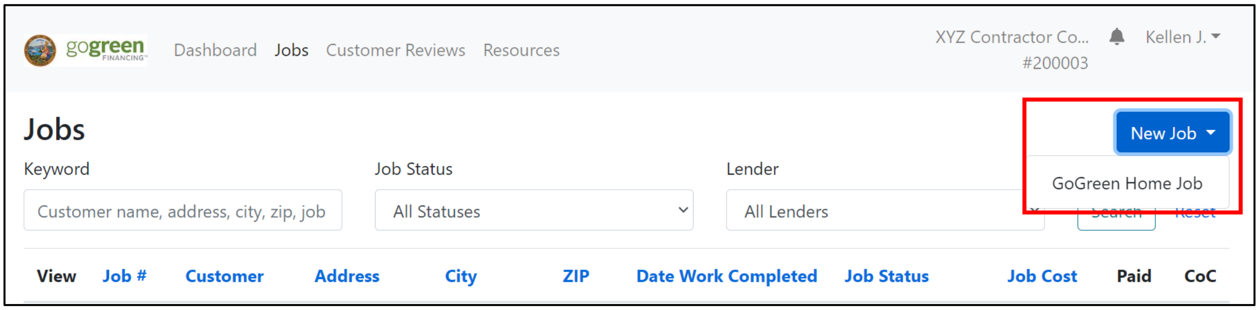
Other noteworthy features:

- **"Bell"** icon – links to a list of notifications for the Contractor account.
- **[Your User Name]** – use this button to update your user profile information, add more user accounts (Admin users only) and update notification preferences.

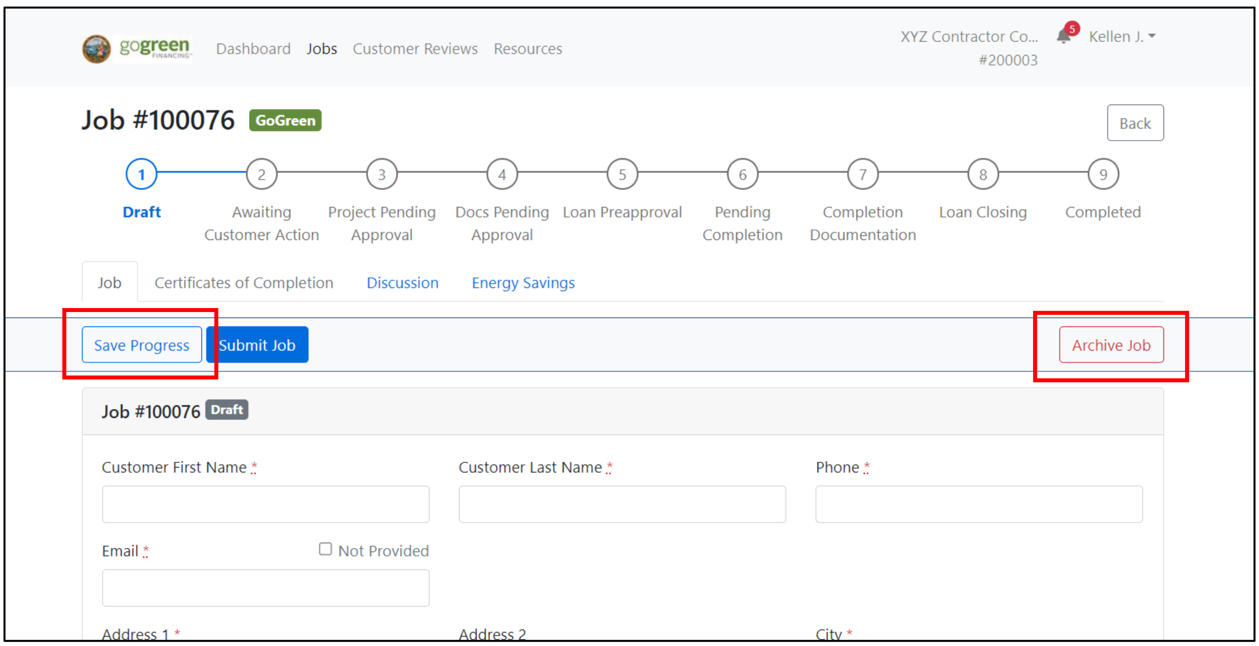


Create and Submit a New Project (Stage 1 – “Draft”)

In the top right corner of the page, click **New Job** and then click **GoGreen Home Job**.



On the **Jobs** tab, fill out all the required fields regarding the Borrower, the property and utilities, the project scope and Eligible Energy Measures (EEMs), and the Lender. If you need to leave the record, you can click **Save Progress** so that you may return to it later. You can also archive it by clicking **Archive Job**.



Add EEMs to Your Project

EEMs eligibility is determined by the utility provider(s); in order to add EEMs to your project, you must first select the gas and electric utilities that serve the property where the project is occurring. Once you select the utility providers, the **Add Equipment and Measures** section will appear for you to select and add EEMs.

> **NOTE:** If you do not have access to the Borrower's utility bill(s), you can leave the **Electric Account Number** and **Gas Account Number** fields blank.

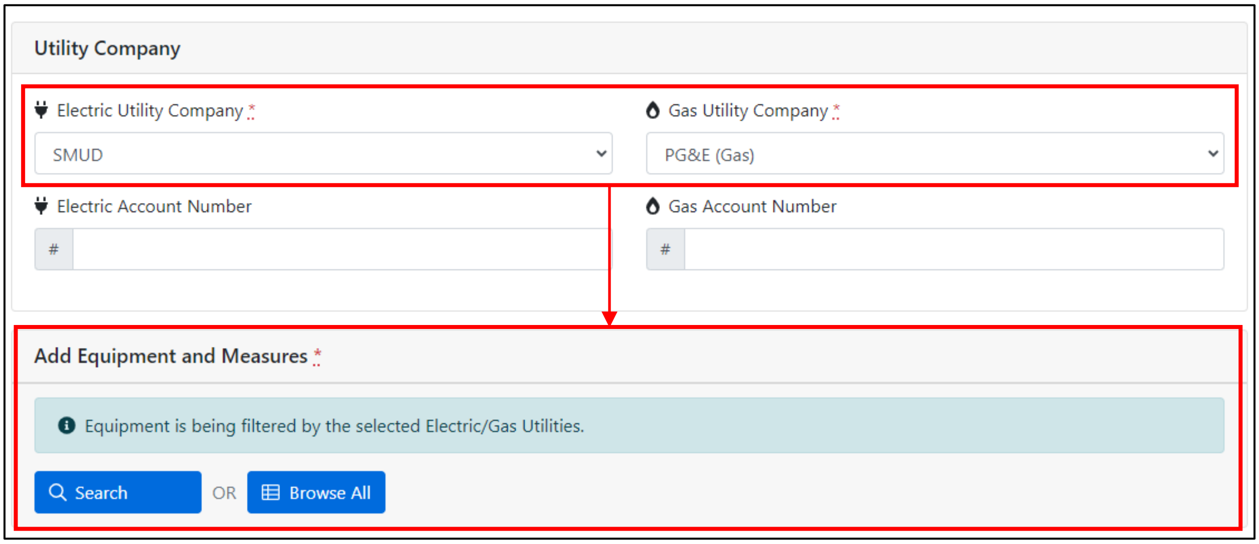
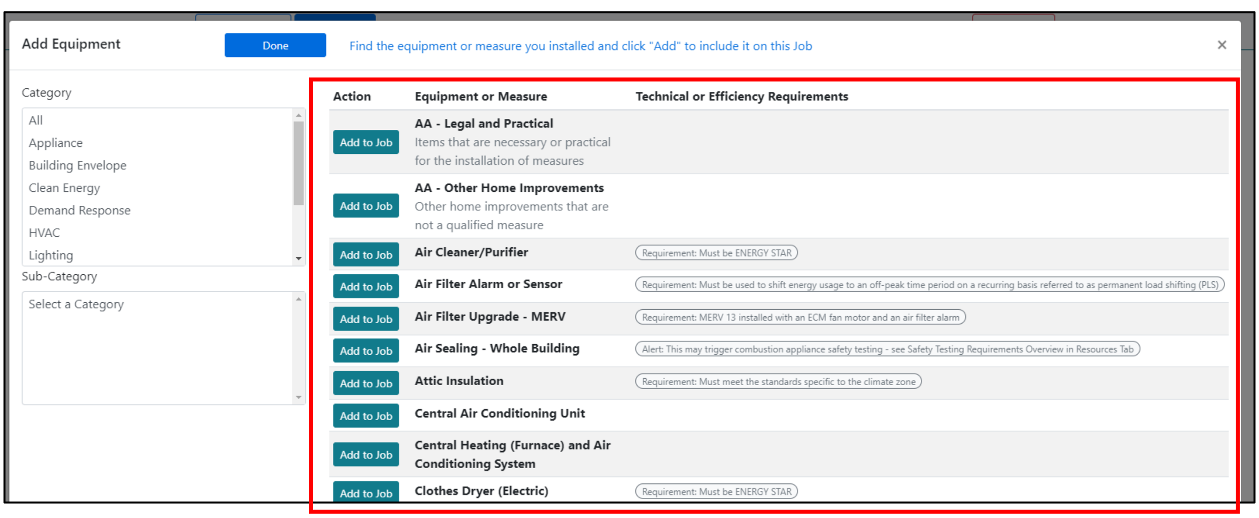


*Figure 1 The **Add Equipment and Measures** section does not appear until the utility companies are identified above.*

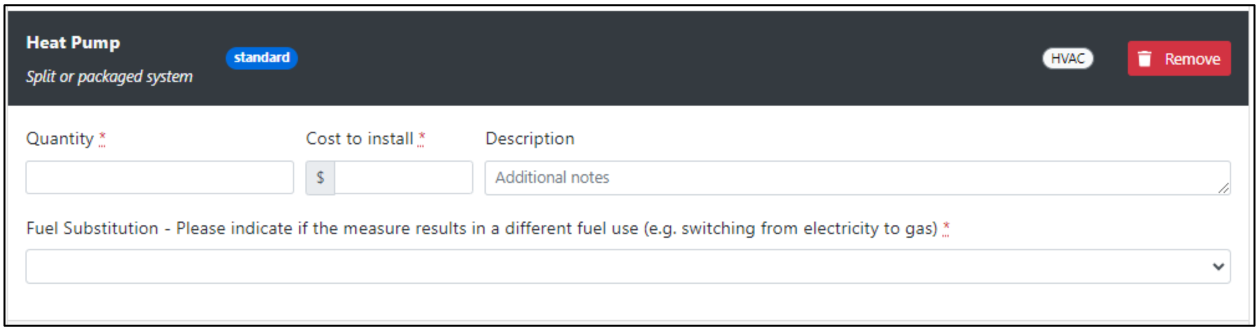
In the **Add Equipment and Measures** section, you can add EEMs by typing the EEM name into the **Search** bar, or by clicking **Browse All**. The **Add Equipment** window will appear. Remember, an EEM's visibility in this list depends on the Borrower's utility provider information entered above.

Scroll through the list or use the **Category** and **Sub-Category** filters on the left to find the EEMs you want to add to the project. Click the **Add to Job** button to add the EEM. When you are finished, click **Done**.



When you have added all the EEMs, click **Done**.

Back in the **Add Equipment and Measures** section, each EEM you selected will now appear. Fill out all the required fields for each EEM (e.g. **Quantity** and **Cost to Install**.) Some EEMs have additional questions, such as about fuel substitution.



Add Utility Bills

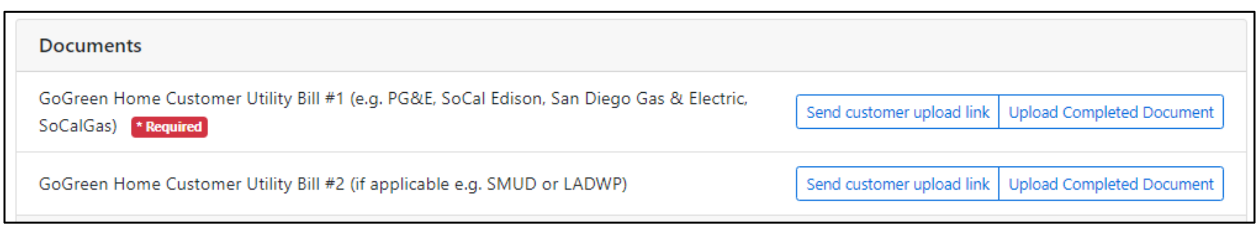
The **Documents** section near the bottom of the page is where utility bills are to be uploaded and attached to the Job record. Both the gas bill and the electricity bill are required.

Note: The utility bill(s) must be dated within the previous 90 days.

There are two different ways to attach utility bills to the record:

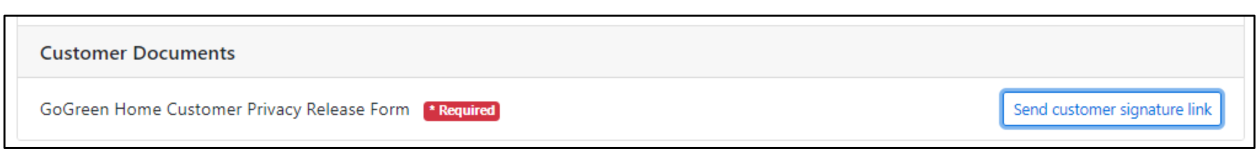
1. Have the Borrower send you the utility bill(s) and upload them yourself by clicking **Upload Completed Document**
2. Send the Borrower a link through which they can upload the bill themselves by clicking **Send Borrower upload link** and following the instructions in the pop-up window.

Sometimes a single utility will provide both gas and electricity; that bill should be uploaded as "Utility Bill #1". If there are two separate utility providers (e.g. PG&E for gas and SMUD for electricity), upload the second bill as "Utility Bill #2".



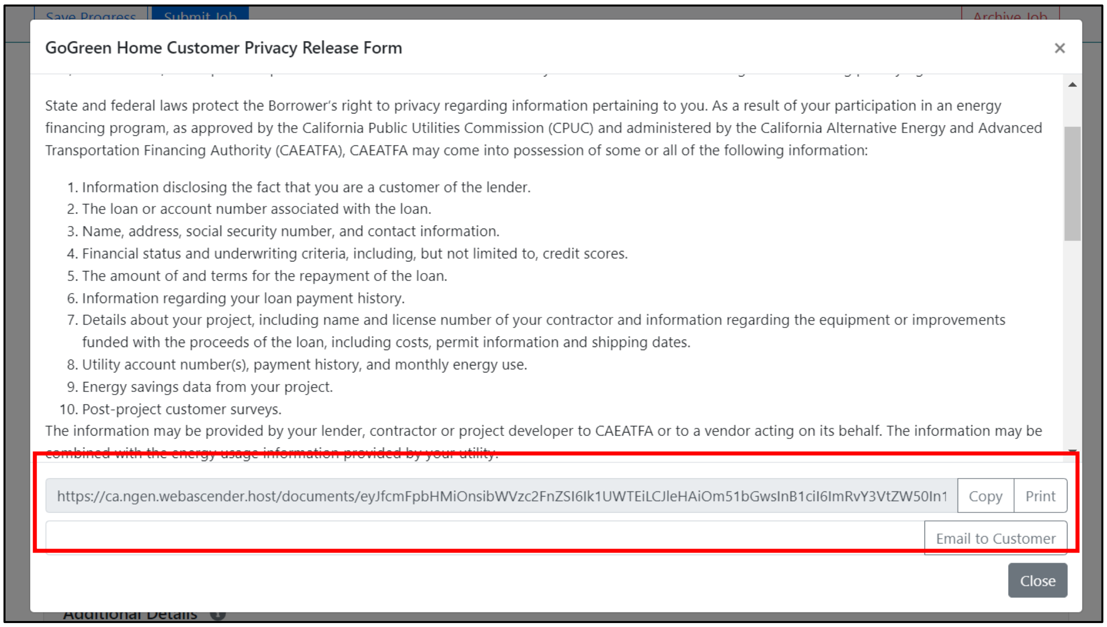
Send the Borrower Privacy Disclosure for Online Signature

Borrowers must also sign a GoGreen Home Privacy Release Form. Click **Send Borrower signature link** to send the Release Form to the Borrower associated with the loan (the names much match).



At the bottom of the pop-up window that appears, you can **Copy** a link to the form and email it to the Borrower using your own email, or you can send the form directly to the Borrower's email address, which should auto-populate into the field upon clicking **Email to Customer**.

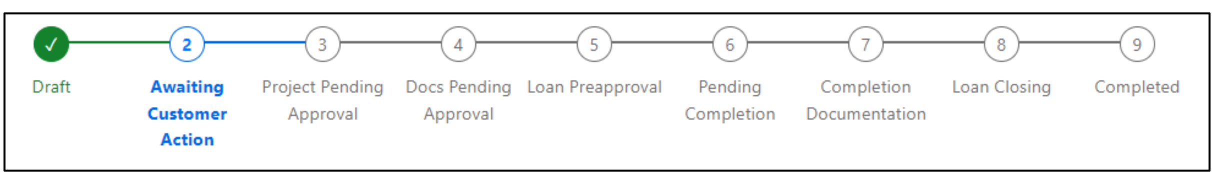
Note: Remember, the Borrower associated with the loan has to sign the Release. This may be different from the person you have a contract with.



Submitting the Project

When you have entered and attached all required data, you can click **Submit Job** at the top of the page to submit the project to the GoGreen Home Team. If there are any errors, you will be alerted and given the chance to fix them.

Upon successful submission, the project status will shift to "Awaiting Borrower Action". This status means that the Privacy Release form is awaiting Borrower signature. You may alert your Borrower to this and encourage them to review and sign it quickly to prevent delays.

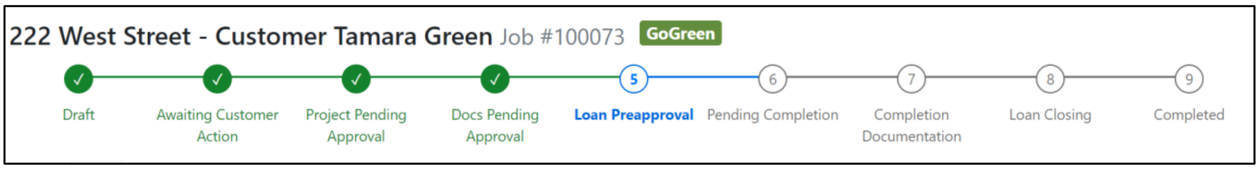


What Happens to the Project Next?

Project Review and Loan Data Entry – Stages 2, 3, 4 and 5

There is no Contractor action required for these stages. Once you click **Submit**, the Job record is routed to the Lender and the GoGreen Home Team for review and further data entry. The GoGreen Home Team will review the submitted project scope and documentation to ensure the project meets GoGreen Home requirements. The Lender will be signaled to enter some initial loan information as well.

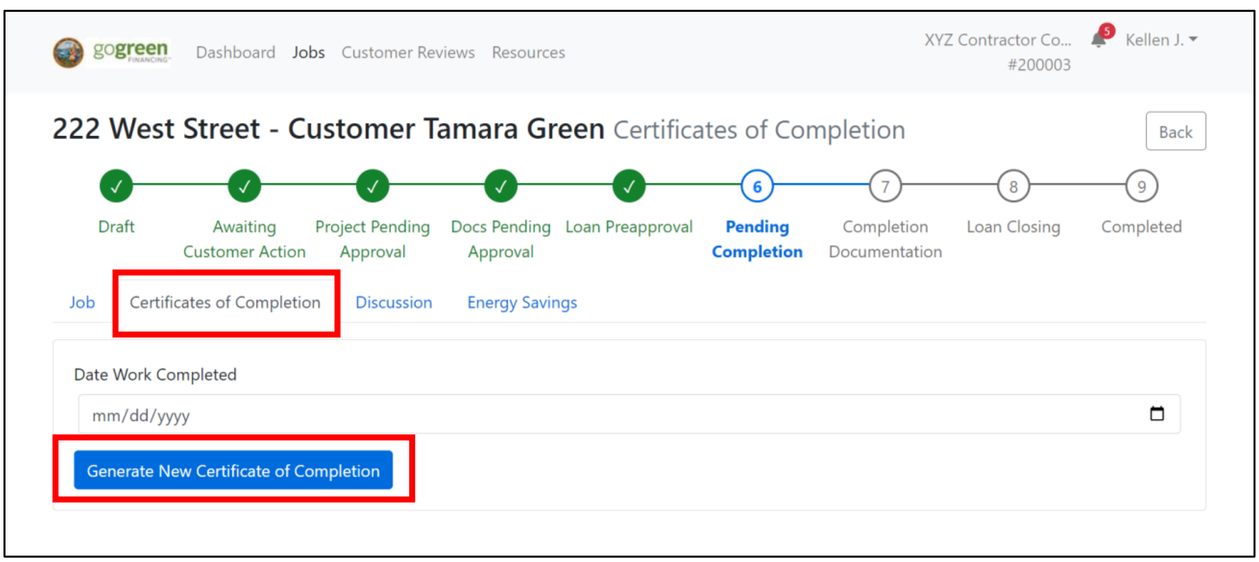
You can track the job's status at the Job record, and you will also receive email updates as the stages progress:



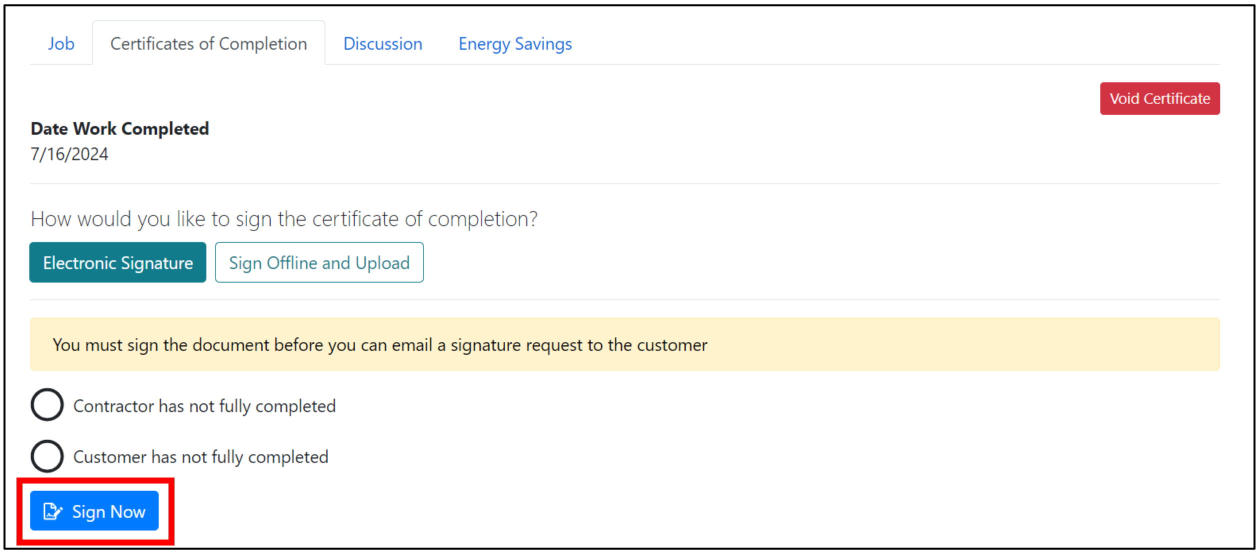
Project Start – Stage 6 ("Pending Completion")

Once the project has been reviewed and approved by the GoGreen Home Team, and the Lender has entered the initial loan data, the Job record's status will change to "Pending Completion". This is your signal to begin the project.

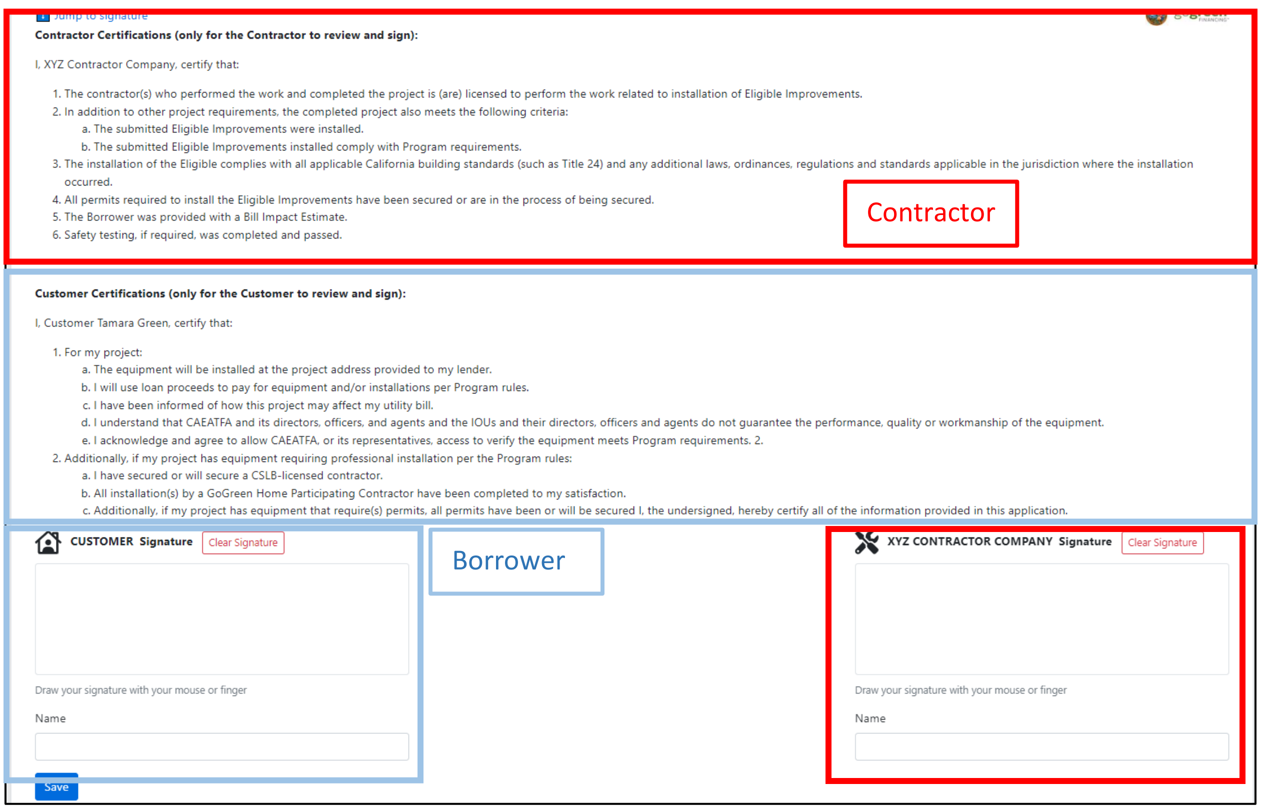
Once the project has been fully completed, return to the Job record and access the **Certificate of Completion** tab on the Job record. Fill in the date and then click **Generate New Certificate of Completion**.



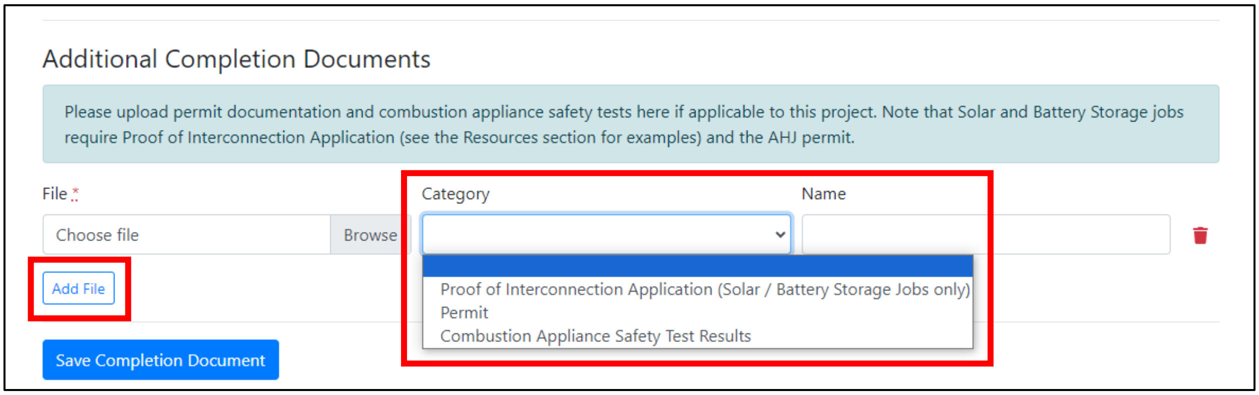
To sign the Certificate of Completion online, click **Sign Now**.



The Contractor and the Customer both sign this page, certifying the section text that is identified for them. Add your signature to the **Contractor signature line**, type out your name, and click **Save**. The Customer will automatically receive a notification to sign.



Back on the Job's **Certificate of Completion** tab, you can also add additional required documentation, such as the Proof of Interconnection Application submission (for solar and storage projects only), permits, and combustion appliance safety tests if applicable. Click **Add File** to add as many of these resources as you need to.



When you are finished at this page, click **Save Completion Document**.

Final Review and Contractor Payment – Stages 7 ("Completion Documentation") and 8 ("Loan Closing")

There is no Contractor task at this stage. Once the Certificate of Completion and additional documentation has been uploaded, the GoGreen Home Team will review. Upon their approval of the Certificates of Completion and submitted documentation, the Lender will be automatically alerted that it is time to close and fund the loan, and disburse payment to the Contractor.

Lenders typically disburse funds within 24 to 48 hours of loan closing.

Lenders will change the **Loan Status** to "In Repayment", which will automatically convert the **Job Status** to "Completed".

The Project is "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 officially enroll the project and loan in the GoGreen Home Program.

Note: Your project may undergo additional review by GoGreen Home's Contractor Manager for quality assurance purposes.