



gogreen
FINANCING™

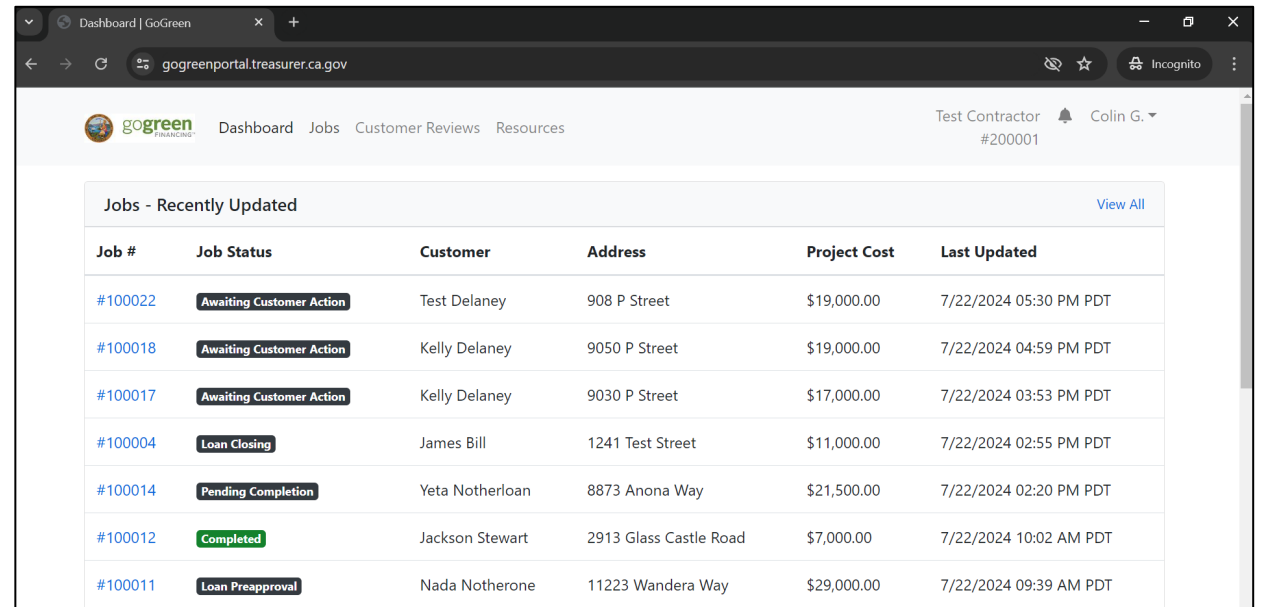
GoGreen Home Portal

GoGreen Home Energy Financing Program

July 29, 2024

The GoGreen Home Portal

- Submit project and property information to the Program
- Discuss projects with the GoGreen Home Team and/or the Lender directly within the system
- Get full clarity as to the status of every project throughout the process
- No more paper forms and spreadsheets

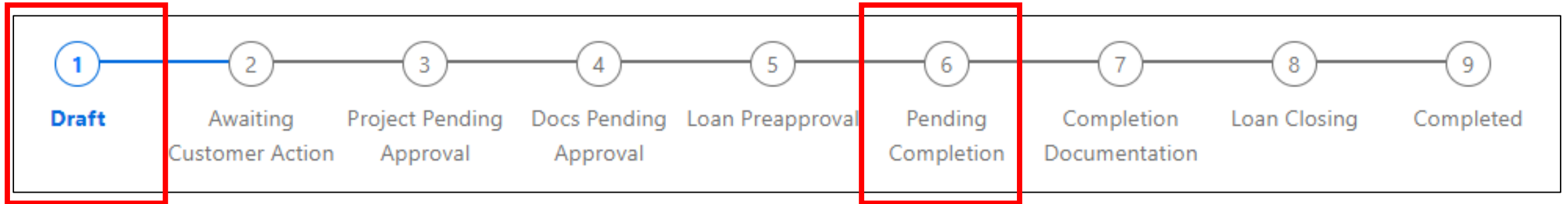


The screenshot shows the GoGreen Home Portal dashboard. The page title is "Dashboard | GoGreen" and the URL is "gogreenportal.treasurer.ca.gov". The user is logged in as "Test Contractor" with the name "Colin G." and ID "#200001". The dashboard features a navigation menu with "Dashboard", "Jobs", "Customer Reviews", and "Resources". The main content area displays a table titled "Jobs - Recently Updated" with a "View All" link. The table has six columns: Job #, Job Status, Customer, Address, Project Cost, and Last Updated. The data rows are as follows:

Job #	Job Status	Customer	Address	Project Cost	Last Updated
#100022	Awaiting Customer Action	Test Delaney	908 P Street	\$19,000.00	7/22/2024 05:30 PM PDT
#100018	Awaiting Customer Action	Kelly Delaney	9050 P Street	\$19,000.00	7/22/2024 04:59 PM PDT
#100017	Awaiting Customer Action	Kelly Delaney	9030 P Street	\$17,000.00	7/22/2024 03:53 PM PDT
#100004	Loan Closing	James Bill	1241 Test Street	\$11,000.00	7/22/2024 02:55 PM PDT
#100014	Pending Completion	Yeta Notherloan	8873 Anona Way	\$21,500.00	7/22/2024 02:20 PM PDT
#100012	Completed	Jackson Stewart	2913 Glass Castle Road	\$7,000.00	7/22/2024 10:02 AM PDT
#100011	Loan Preapproval	Nada Notherone	11223 Wandera Way	\$29,000.00	7/22/2024 09:39 AM PDT

IMPORTANT: This is not a Loan Application Portal. Your Customer still needs to apply for a loan directly with the Lenders on their own websites.

The Project Submission Process



- There are **nine Stages** to submitting a project to GoGreen Home, requiring interaction by Contractors, Lenders, and the GoGreen Home Team at various points.
- **Contractors only enter data at two Stages: Stage 1 (“Draft”) and Stage 6 (“Pending Completion”).**
- Other Stages are for Lenders and the GoGreen Home Team to enter, review, and approve data.

Creating Your Account

- Only Contractors that have enrolled in GoGreen Home can apply for Portal Access.
- Fill in:
 - **Contractor Information**
 - **Contractor Profile:** Your business name, address and contact information
 - **User Account:** Create your personal User Account
 - **GoGreen Home Program Information**
 - Confirm you are applying for GoGreen Home
- We will review your application, confirm active enrollment, and then authorize your account within 24 to 48hrs.

Submitting a Project

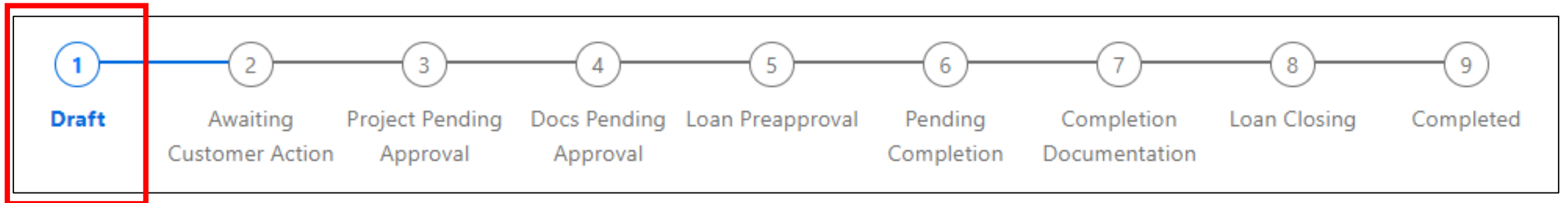
What to have ready before you start to submit a project:

- The name of the Borrower's Gas and Electricity provider(s)
- The name of the Lender the Borrower is preapproved with
- The Borrower's email address
- The project address
- The total project cost and the total financed amount approved by the Lender, if different



NOTE: You should only enter project data into the Portal once your customer has been approved by the Lender.

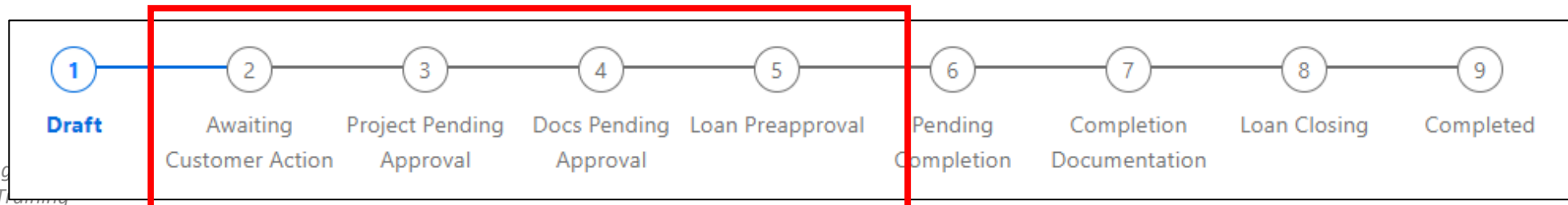
Submitting a Job Demo



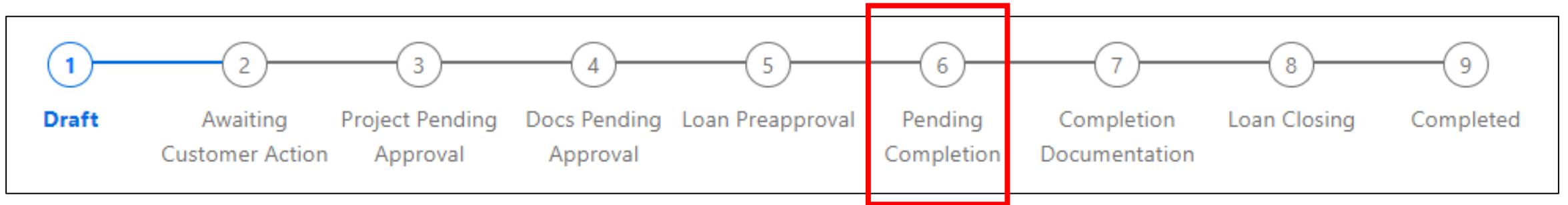
What Happens After Project Submission?

Once you submit a Job record:

- The GoGreen Home Team will begin reviewing the project scope, costs, utilities and documentation.
- If there are any errors, the GoGreen Home Team will return the record to you for correction and notify you. Keep an eye on the Discussion tab!
- If the submission complies with GoGreen Home rules, the record will be sent to the Lender to add some initial loan details.
- When the Lender finalizes their data, you will receive an automated email notification alerting you to begin the project.



Submitting Completion Documentation



What if Project Scopes or Costs Change Throughout the Project?

Sometimes costs change after a project draft has been submitted. A Contractor may discover issues that require remediation, or a Borrower may decide on an addition or a change to the project scope.

If the change results in an increased project cost, the Borrower should work directly with the Lender to confirm eligibility.

To make changes to the project record in the Portal, Lenders and Contractors should communicate with the GoGreen Home Team about the change using the Discussion tab of the Job record. The GoGreen Home Team will then go in and change the project scope manually for the Contractor.

The screenshot displays the GoGreen Home Portal interface. At the top, a progress bar shows the project stages: Draft, Awaiting Customer Action, Project Pending Approval, Docs Pending Approval, Loan Preapproval, Pending Completion (highlighted with a blue circle and number 6), Completion Documentation, Loan Closing, and Completed. Below the progress bar, a navigation menu includes Job, Certificate of Completion, Loan, Discussion (highlighted with a red box), External Reviews, Quality Assurance, and Energy Savings. The main content area shows a discussion thread with three messages:

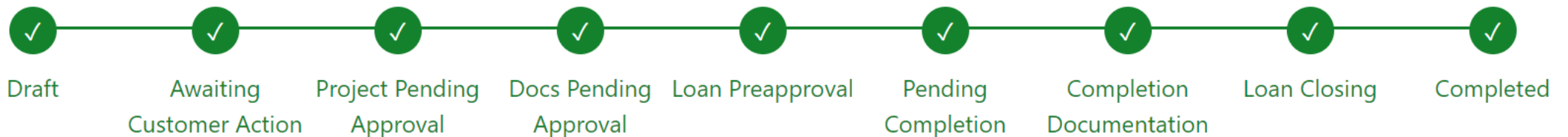
- GoGreen Home Program Team** (Kelly Delaney): 7/28/2024 09:55 PM PDT. Message: "Hi Lender and Contractor, We have added the new EEM and cost as directed. Thank you!"
- First US Credit Union** (Julie Lessard): 7/28/2024 09:54 PM PDT. Message: "Hi Contractor, This is confirmed. GoGreen Home Team, please add the new EEM and \$3,000 cost. The Customer is preapproved for this new amount."
- Test Contractor 2** (Test Contractor): 7/28/2024 09:53 PM PDT. Message: "Hi Lender, Please confirm the additional cost of a full duct replacement for this HVAC job at 1123 Iron Point."

On the right side, there is a "Post New Message" section with a "Subscribed" button, a "Message" input field, and a list of recipients: "Send a copy via email to GoGreen Home Program Team and:" with checkboxes for "Test Contractor 2" and "First US Credit Union". A blue "Add this message" button is at the bottom.


Loan Closing

Once the Contractor and the Borrower have both signed their Certificates of Completion:

- The GoGreen Home Team will review the submitted Completion Documentation.
- If there are any errors, the GoGreen Home Team will reach out to you to resolve the error or request additional documentation.
- If the documentation complies with GoGreen Home rules, the Lender will be signaled to close the loan.
- Final payment to the Contractor depends on how quickly the Borrower signs the loan documents; most Lenders will cut and mail a check within 48 hours of loan closure.
- The Job status will convert to Completed. If you have not heard from the Lender about payment, please reach out to them.




Portal Resources for Contractors




GoGreen Home Portal Contractor Quick Start Guide

There are nine stages to submitting a project to GoGreen Home, requiring interaction by Contractors, Lenders, and the GoGreen Home Team at various points. The stages which require Contractor engagement and 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; Contractor uploads additional required documentation such as permits and safety test results. If the project includes solar or battery storage measures, Contractor also uploads 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

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



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).

Contents

- What is the GoGreen Home Portal? 1
- GoGreen Home Portal - Quick Start Guide 2
- Navigating the GoGreen Home Portal 3
- Create and Submit a New Project (Stage 1 – "Draft") 4
 - Add EEMs to Your Project 5
 - Add Utility Bills 6
 - Send the Borrower Privacy Disclosure for Online Signature 6
 - Submitting the Project 7
- What Happens to the Project Next? 8
 - Project Review and Loan Data Entry – Stages 2, 3, 4 and 5 8
 - Project Start – Stage 6 ("Pending Completion") 8
 - Final Review and Contractor Payment – Stages 7 ("Completion Documentation") and 8 ("Loan Closing") 10
- The Project is "Completed"! 10

www.GoGreenFinancing.com
GoGreen Home Portal – Contractor User Guide
CAEATFA-CHEEF-1220-125 Rev. 2024.07.17



GoGreen Home Portal How to Create a Contractor Account & Add Users

Getting Started – Enroll in GoGreen Home

You must be enrolled in GoGreen Home to use the GoGreen Home Portal. For more information about enrolling in GoGreen Home, please visit this page: gogreenfinancing.com/partners/contractor-partners/home/

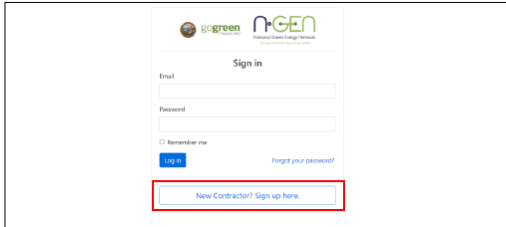
How to Log On

Follow this link to create your account and log on: https://gogreenportal.treasurer.ca.gov/users/sign_in

Creating Your User Account

Note: Only create a Contractor Account once for your company. To add new users, your company's GoGreen Home Portal Account Administrators (the person who creates the account and/or users who are designated as Administrators) must log in and add them.

- At the log in page, click New Contractor? Sign up here.



- At the Step 1 - Contractor Profile page, fill in all required fields and then click Continue at the bottom of the page.
- At the Step 2 - New User Account page, fill in all required fields and then click Create My Account and Contractor Profile at the bottom of the page.
- The next page is the Programs page. Click Apply to Program to link your account with GoGreen Home.

Questions?

Call or email the GoGreen Home Contractor Support team:

EGIA

gogreen@egia.org

888-987-3443