## 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 (Installation 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

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Submit Program Application</td>
</tr>
<tr>
<td>2</td>
<td>PM Approves Application</td>
</tr>
<tr>
<td>3</td>
<td>Create Customers</td>
</tr>
<tr>
<td>4</td>
<td>Phase: In Open</td>
</tr>
<tr>
<td>5</td>
<td>Phase: In Submitted</td>
</tr>
<tr>
<td>6</td>
<td>Phase: In Post-Inspection</td>
</tr>
<tr>
<td>7</td>
<td>Phase: In Approved</td>
</tr>
</tbody>
</table>

**SP** - Service Provider  **PM** - Program Manager