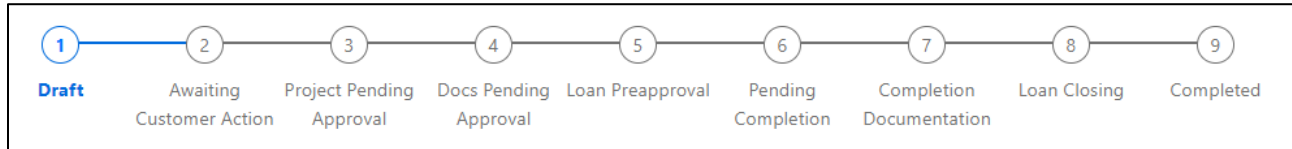# GoGreen Home Portal – Process Overview
Lender Quick Start Guide

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 Lender engagement and data entry are highlighted in blue below.**

1	2	3	4	5	6	7	8	9
Draft	Awaiting Customer Action	Project Pending Approval	Docs Pending Approval	Loan Preapproval	Pending Completion	Completion Documentation	Loan Closing	Completed

Stage	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 Borrower, 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; 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 (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 to "In repayment".	Lender
9. **Completed**	The Loan and Project records are sent to GoGreen Home for final enrollment.	Lender

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