



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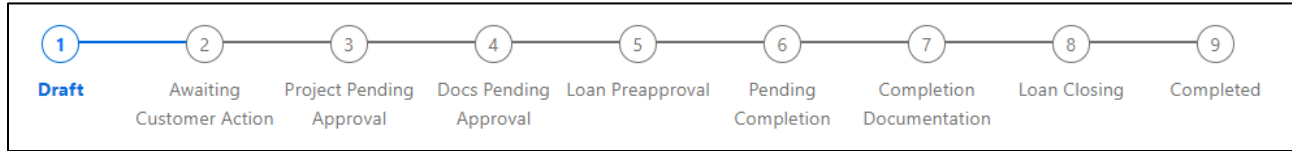
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Log In: https://gogreenportal.treasurer.ca.gov/users/sign_in



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:

The screenshot shows the GoGreen Home Portal dashboard. At the top, there is a navigation bar with the following tabs: **Dashboard**, **Jobs**, **Customer Reviews**, and **Resources**. The **Dashboard** tab is highlighted with a red box. To the right of the navigation bar, the user's name "Kellen J." and a notification bell icon with a red "5" are visible. Below the navigation bar, the main content area displays a section titled "Jobs - Recently Updated" with a "View All" link. This section contains a table with the following columns: Job #, Job Status, Customer, Address, Project Cost, and Last Updated.

Job #	Job Status	Customer	Address	Project Cost	Last Updated
#100073	Completed	Customer Tamara Green	222 West Street	\$19,500.00	7/15/2024 05:10 PM PDT
#100075	Draft				7/14/2024 09:21 PM PDT
#100074	Draft				7/14/2024 09:20 PM PDT
#100072	Docs Pending Approval	Customer Joe Gomez	111 W State Street	\$14,000.00	7/14/2024 09:10 PM PDT

- **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.

The screenshot shows the "Notification Preferences" settings page. It features a list of notification types, each with a checkbox that is currently checked. The notification types are:

- A contractor program application status changed
- A closing date is changed on a loan
- Document request sent to a customer
- A customer digitally signed a certificate of completion
- A job has not been updated recently
- A new discussion message is added to a job
- A job has changed to the approved to close loan 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 closed loan status
- A job has changed to the completed status
- A job has changed to the returned to contractor status
- A job has changed to the submitted status
- A loan status changed
- A certificate of completion was completed
- Certificate of Completion sign off request sent to a contractor or customer



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**.

The screenshot shows the GoGreen Contractor Dashboard. At the top right, the user is identified as 'XYZ Contractor Co...' and 'Kellen J.' with a notification bell icon. Below this, the 'Jobs' tab is active. A red box highlights the 'New Job' button in the top right corner. A dropdown menu is open below it, showing the option '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**.

The screenshot shows the 'Job #100076' page. At the top, the job is labeled 'GoGreen'. Below this is a progress bar with 9 stages: 1. Draft (highlighted), 2. Awaiting Customer Action, 3. Project Pending Approval, 4. Docs Pending Approval, 5. Loan Preapproval, 6. Pending Completion, 7. Completion Documentation, 8. Loan Closing, and 9. Completed. Below the progress bar are tabs for 'Job', 'Certificates of Completion', 'Discussion', and 'Energy Savings'. A red box highlights the 'Save Progress' button, and another red box highlights the 'Archive Job' button. Below this is a form for entering customer information, including fields for Customer First Name, Customer Last Name, Phone, Email, Address 1, Address 2, and City.



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**.

Action	Equipment or Measure	Technical or Efficiency Requirements
Add to Job	AA - Legal and Practical Items that are necessary or practical for the installation of measures	
Add to Job	AA - Other Home Improvements Other home improvements that are not a qualified measure	
Add to Job	Air Cleaner/Purifier	Requirement: Must be ENERGY STAR
Add to Job	Air Filter Alarm or Sensor	Requirement: Must be used to shift energy usage to an off-peak time period on a recurring basis referred to as permanent load shifting (PLS)
Add to Job	Air Filter Upgrade - MERV	Requirement: MERV 13 installed with an ECM fan motor and an air filter alarm
Add to Job	Air Sealing - Whole Building	Alert: This may trigger combustion appliance safety testing - see Safety Testing Requirements Overview in Resources Tab
Add to Job	Attic Insulation	Requirement: Must meet the standards specific to the climate zone
Add to Job	Central Air Conditioning Unit	
Add to Job	Central Heating (Furnace) and Air Conditioning System	
Add to Job	Clothes Dryer (Electric)	Requirement: Must be ENERGY STAR



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.

Heat Pump

Split or packaged system

standard

HVAC

Remove

Quantity *	Cost to install *	Description
<input type="text"/>	\$ <input type="text"/>	Additional notes <input style="width: 90%;" type="text"/>
Fuel Substitution - Please indicate if the measure results in a different fuel use (e.g. switching from electricity to gas) *		
<input type="text"/>		

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”.

Documents

GoGreen Home Customer Utility Bill #1 (e.g. PG&E, SoCal Edison, San Diego Gas & Electric, SoCalGas) * Required	<input type="button" value="Send customer upload link"/> <input type="button" value="Upload Completed Document"/>
GoGreen Home Customer Utility Bill #2 (if applicable e.g. SMUD or LADWP)	<input type="button" value="Send customer upload link"/> <input type="button" value="Upload Completed Document"/>

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).

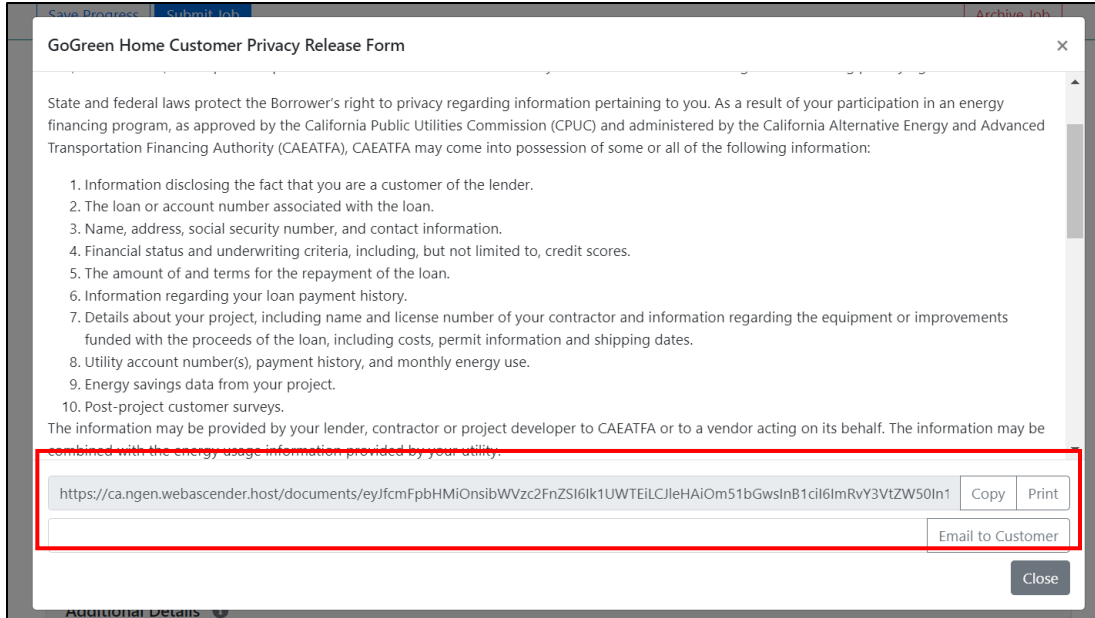
Customer Documents

GoGreen Home Customer Privacy Release Form * Required	<input type="button" value="Send customer signature link"/>
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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**.

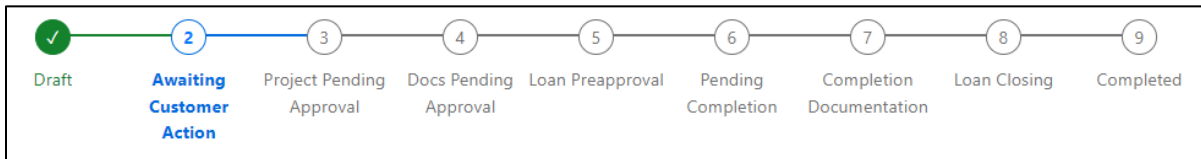
Note: Remember, the Borrower associated with the loan has to sign the Release. This may be different from the person you have a contract with.



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.



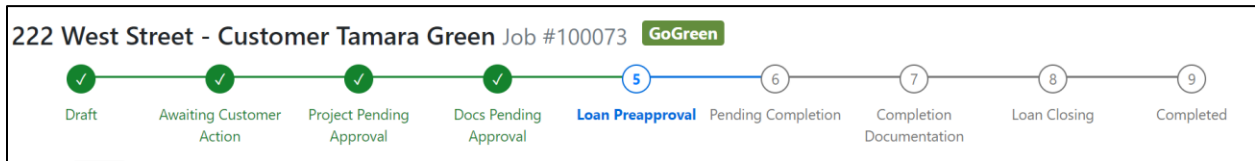


What Happens to the Project Next?

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**.

gogreen FINANCING™ Dashboard Jobs Customer Reviews Resources XYZ Contractor Co... #200003 Kellen J. ▾

222 West Street - Customer Tamara Green Certificates of Completion [Back]

Progress bar stages: 1. Draft (checked), 2. Awaiting Customer Action (checked), 3. Project Pending Approval (checked), 4. Docs Pending Approval (checked), 5. Loan Preapproval (checked), 6. Pending Completion (highlighted in blue), 7. Completion Documentation, 8. Loan Closing, 9. Completed.

Job Certificates of Completion Discussion Energy Savings

Date Work Completed
mm/dd/yyyy

Generate New Certificate of Completion



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

Job Certificates of Completion Discussion Energy Savings

[Void Certificate](#)

Date Work Completed
7/16/2024

How would you like to sign the certificate of completion?

[Electronic Signature](#) [Sign Offline and Upload](#)

You must sign the document before you can email a signature request to the customer

Contractor has not fully completed

Customer has not fully completed

[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.

[Jump to signature](#)

Contractor Certifications (only for the Contractor to review and sign):

I, XYZ Contractor Company, certify that:

- The contractor(s) who performed the work and completed the project is (are) licensed to perform the work related to installation of Eligible Improvements.
- In addition to other project requirements, the completed project also meets the following criteria:
 - The submitted Eligible Improvements were installed.
 - The submitted Eligible Improvements installed comply with Program requirements.
- The installation of the Eligible complies with all applicable California building standards (such as Title 24) and any additional laws, ordinances, regulations and standards applicable in the jurisdiction where the installation occurred.
- All permits required to install the Eligible Improvements have been secured or are in the process of being secured.
- The Borrower was provided with a Bill Impact Estimate.
- Safety testing, if required, was completed and passed.

Contractor

Customer Certifications (only for the Customer to review and sign):

I, Customer Tamara Green, certify that:

- For my project:
 - The equipment will be installed at the project address provided to my lender.
 - I will use loan proceeds to pay for equipment and/or installations per Program rules.
 - I have been informed of how this project may affect my utility bill.
 - I understand that CAEATFA and its directors, officers, and agents and the IOUs and their directors, officers and agents do not guarantee the performance, quality or workmanship of the equipment.
 - I acknowledge and agree to allow CAEATFA, or its representatives, access to verify the equipment meets Program requirements.
- Additionally, if my project has equipment requiring professional installation per the Program rules:
 - I have secured or will secure a CSLB-licensed contractor.
 - All installation(s) by a GoGreen Home Participating Contractor have been completed to my satisfaction.
 - Additionally, if my project has equipment that require(s) permits, all permits have been or will be secured. I, the undersigned, hereby certify all of the information provided in this application.

CUSTOMER Signature [Clear Signature](#)

Draw your signature with your mouse or finger

Name

[Save](#)

Borrower

XYZ CONTRACTOR COMPANY Signature [Clear Signature](#)

Draw your signature with your mouse or finger

Name



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.

Additional Completion Documents

Please upload permit documentation and combustion appliance safety tests here if applicable to this project. Note that Solar and Battery Storage jobs require Proof of Interconnection Application (see the Resources section for examples) and the AHJ permit.

File

Choose file

Category	Name
Proof of Interconnection Application (Solar / Battery Storage Jobs only) Permit	
Combustion Appliance Safety Test Results	

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.