Project Developer/Trade Pro

<u>**Project Developer/Trade Pro:**</u>

If a project lead and/or NMEC project record was not made by a PG&E Representative, the Project Developer/Trade Pro can create the OBF NMEC project record by inputting the additional fields within their respective stages:

1. <u>Getting Started</u>
1.1. Select the *NMEC Projects* tab and click *Create New NMEC Project*
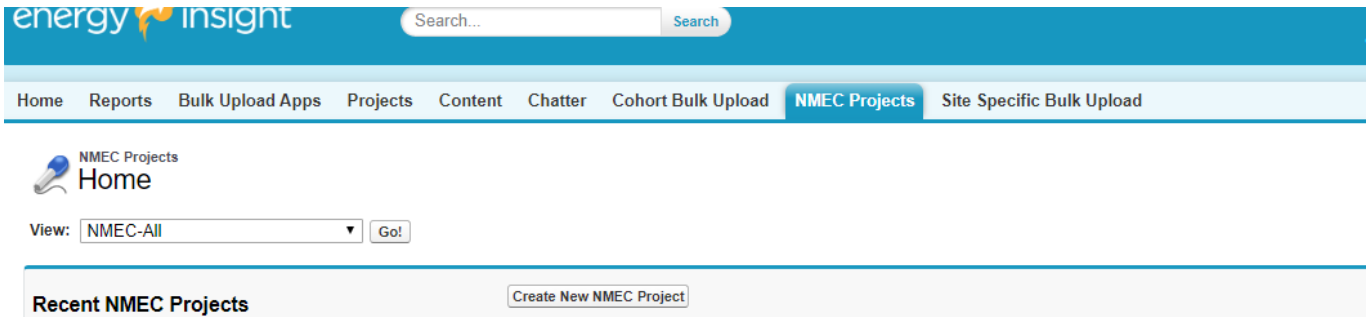
1.2. Click the dropdown menu and select either Population Non-Res. or Site-Specific projects accordingly
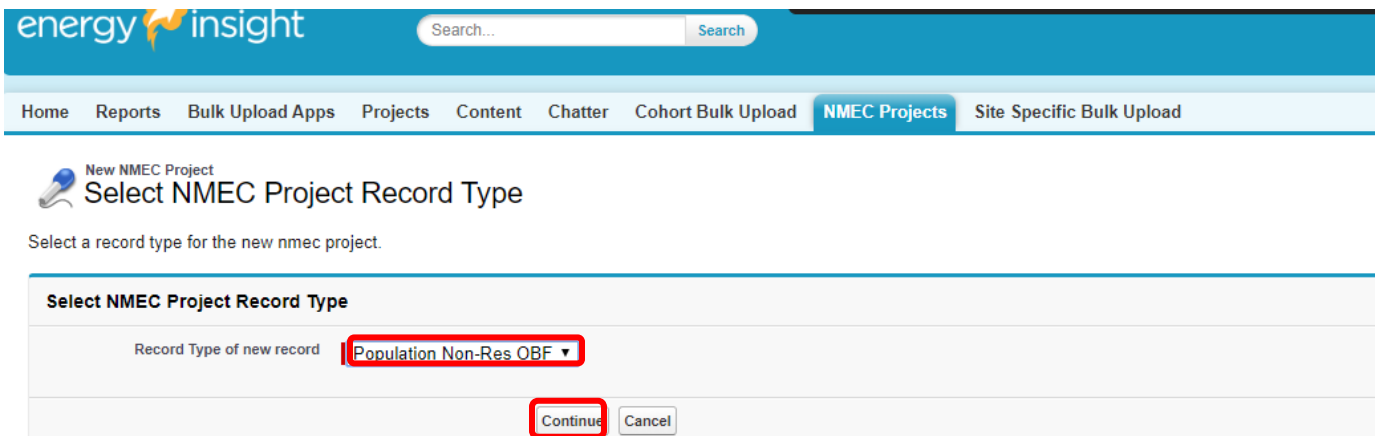
Note:

- *For **Tier 1 LED Lighting projects** -select the **Population Non-Res. NMEC project** record type*
- *For **Tier 2 or Tier 1 Non-Lighting projects** -select the **Site-Specific NMEC project** record type*

2. <u>Stage: NMEC Project Information</u>
2.1. Once the project record has been created, click *edit* and enter the following fields:
   2.1.1. Project Name –make sure to include the OBF application number (the OBF application number will be used to link your NMEC project record with your Financing Application)
   2.1.2. Anticipated Close Date
   2.1.3. Budget
   2.1.4. Site Building Type Description
   2.1.5. Tech. Categories (lighting, controls, etc.)
   2.1.6. Special Flag -select the On-Bill Financing option

Note: *As previously mentioned, PG&E is increasing the pool of funded OBF Quality Assurance (QA) providers. Within the Comments section, you will need to disclose your preferred QA*

3. Stage: Description & New

3.1. Before you can successfully save your NMEC project record, click *edit* and enter the following fields -*don't forget to click save*:

      3.1.1. SA ID

      3.1.2. Site Name -to enter the Site Name, click on the *magnifying glass* and then select the active and primary Service Agreement ID (see image below)
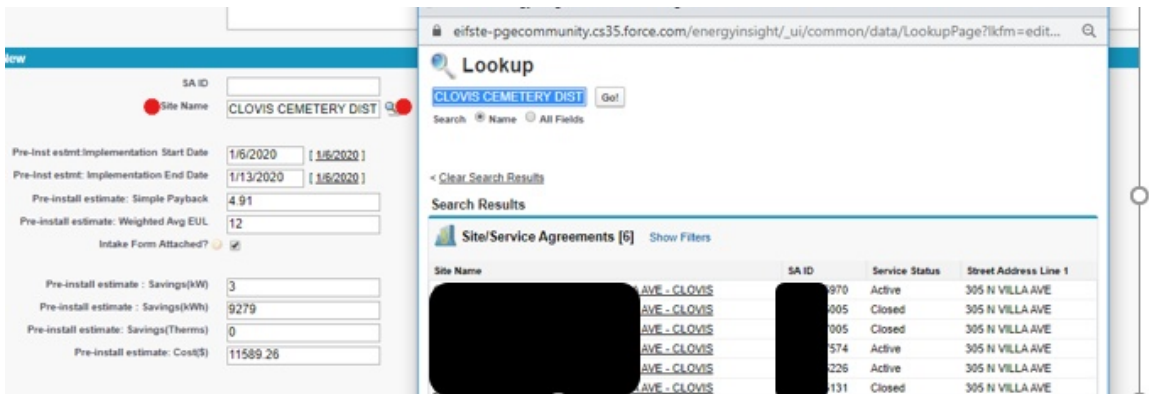
      3.1.3. Pre-Install Estimate: Intervention Start Date + Intervention End Date

      3.1.4. Pre-Install Estimate: Simple Payback, Weighted Avg. EUL, Savings (kW, kWh, therms), Costs ($)

      3.1.5. Intake Form Attached -check the box

      3.1.6. Payee Type

      3.1.7. Site Contact: First and Last Name, Phone, Email

      3.1.8. Program: On-Bill Finance (Population Non-Res)

      3.1.9. Project Developer

Note: Only fill in the Implementer field if you are submitting the project record as a PG&E Third-Partner profile

4. Sharing Access

4.1. To share access for your new NMEC project record, locate and click the *Sharing* option

4.2. Click add

4.3. Enter the name of the QA firm selected to perform the QA review
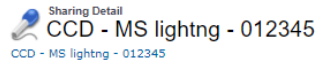
4.4. Click *find*

4.5. Select Partner User and click to *add*

4.6. Change access level to "Read/Write" -this will allow the QA to enter both the pre and post-install estimates to the NMEC project record

4.7. Click *save*

5. <u>Attaching Files:</u>
5.1. To attach files: pre-install project package, signed 3rd party release form, payment history screening request, and/or any additional information you deem fit click *Attach File*
5.2. Select the file and click *Choose File*
5.3. Click the *Attach File* button -when the upload is complete the file information will appear below
5.4. Click *done* to return to the project record
6. <u>Stage: Project Development</u>
6.1. Once all necessary documents have been uploaded, click *edit* to confirm the following fields -*don't forget to click save*:
6.1.1. Pre-Install Report Packet Uploaded -select Yes
6.1.2. Application Signed -check the box

7. <u>Stage: Feasibility Assessment</u>
7.1. To move your project to the next stage, click *edit*
7.2. Locate the *Next Stage* field and select "Feasibility Assessment"
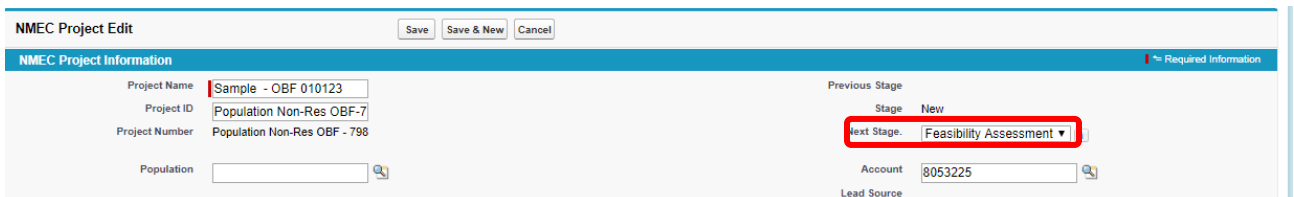
7.3. Click *save*

Note: The Feasibility Assessment will be completed by the OBF PM. The OBF PM will be responsible for moving the following project stages: Project Development, Early PM Review, and Pre-Install Tech. Review. A "chatter" message will be sent to the Tech. Reviewer/QA to start the pre-install review

Note: The name of the QA Reviewer can be found on either the Tech. Reviewer or Field Engineer fields

8. <u>Stage: Pre-Install Tech. Review</u>

8.1. Once the QA begins the pre-install review, the Tech. Reviewer/QA will click *edit* and enter the following fields -*don't forget to click save*:

8.1.1. Estimate Review Complete Date -this is when the Project Developer/Trade Pro should expect to see initial comments provided by the Tech. Reviewer/QA

8.1.2. Tech Reviewer Status -select either Pass, Fail, or Hold

8.1.3. Tech. Reviewer Pre-Install Estimates: (kW, kWh, therms)

8.2. The Tech. Reviewer/QA will send a "chatter" message to the OBF PM and PD recommending project for approval (please follow template)
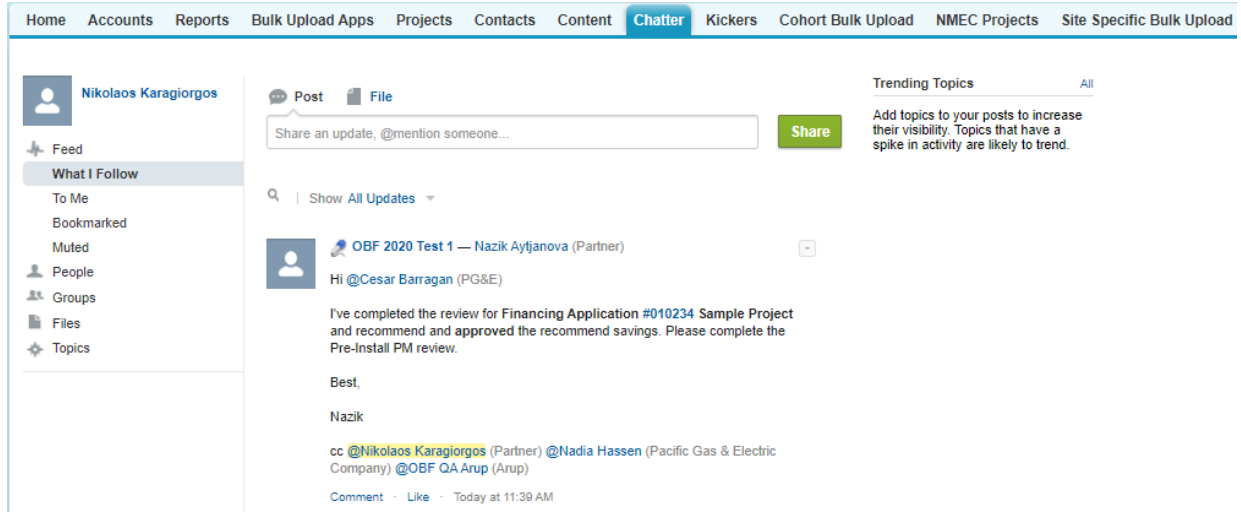
9. Stage: Pre-Install PM Review

9.1. After the Tech. Reviewer/QA recommends project for approval, the OBF PM will review the project for installation. The OBF PM will click *edit* to confirm the following fields *-don't forget to click save*:

    9.1.1. Pre-Install Review Complete -check the box

    9.1.2. Project Approval for Installation -select either Yes or No

9.2. OBF PM will also update the Financing Application status:

    9.2.1. Pre-Install Review → Loan Agreement Sent → Customer Installation

9.3. Permission to install project is granted

10. Stage: Implementation

10.1. Once project installation has been completed, click *edit* to confirm the following fields *-don't forget to click save*:

    10.1.1. Implementation Summary -update the project description

    10.1.2. Actual Implementation Start Date

    10.1.3. Invoice Received

    10.1.4. Post-Install Estimate: Savings (kw, kWh, therms)

    10.1.5. Post-Install Estimate: EUL

    10.1.6. Post-Install Estimate: Project Cost ($)

    10.1.7. Post-Install Estimate: Simple Payback
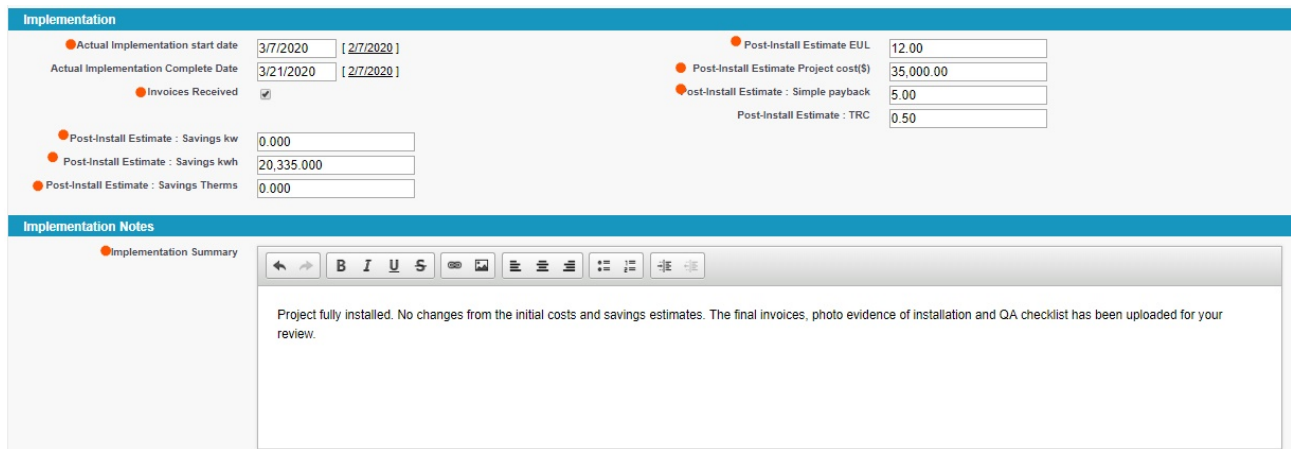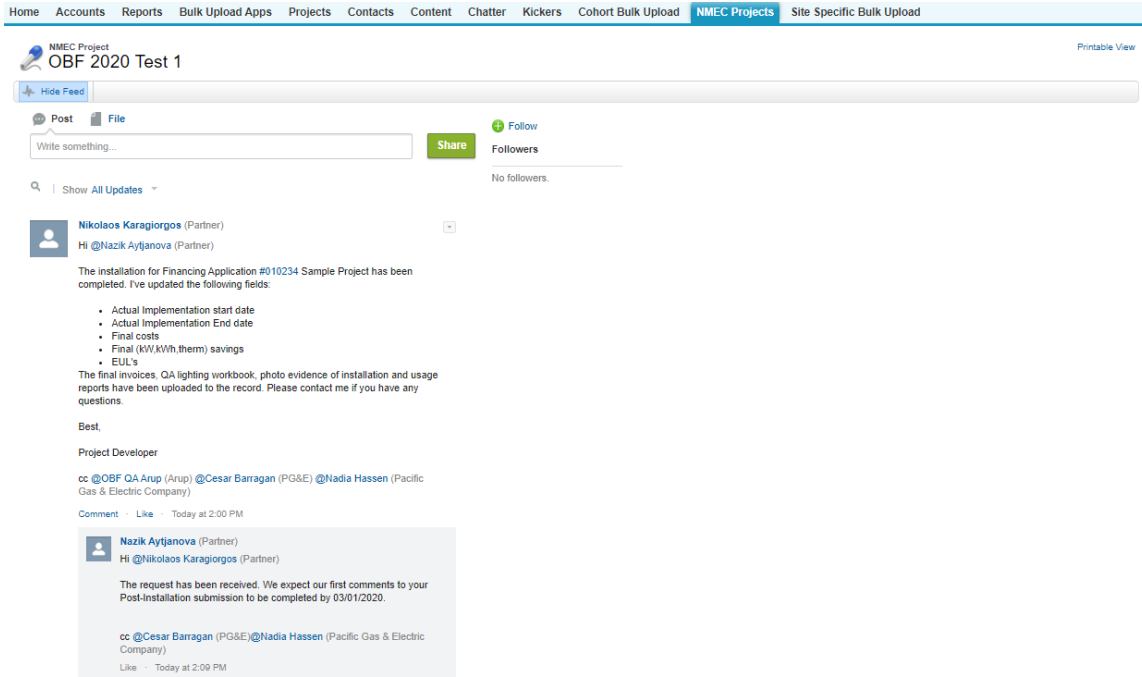

10.2. Send a "chatter" message to the Tech. Reviewer/QA

11. Stage: Post-Install Tech. Review

11.1. The Tech. Reviewer/QA will click *edit* and enter the following fields -*don't forget to click save*:

- 11.1.1. Post-Inspection Date - this is when the Project Developer/Trade Pro should expect to see initial comments provided by the Tech. Reviewer/QA
- 11.1.2. Post-Install Tech. Review Status -select either Pass, Fail, or Hold
- 11.1.3. Post-Install Tech. Review Date
- 11.1.4. Tech. Reviewer Pre-Install Estimates: (kW, kWh, therms)
- 11.1.5. Post-Install Inspection Summary

12. Stage: Post-Install PM Review

12.1. Once the post-install is approved, the OBF PM will click *edit* to confirm the following fields -*don't forget to click save*:

- 12.1.1. Post-Install Report Complete -check the box
- 12.1.2. Post-Install Review Complete -check the box

12.2. OBF PM will revise the Loan Agreement, if needed

For additional information or questions, contact the OBF Team at: OBFProgram@pge.com