

smart-e loan

NGEN How-To Guide

For Contractors



Welcome to NGEN! This document guides you through the Smart-E process and using its project portal NGEN (pronounced like "engine") - the National Green Energy Network.

Signing into NGEN: <https://ngen.ctgreenbank.com>

- Your email address is your username

Resetting Your Password:

1. Click "Forgot your password?" on the log-in page
2. Enter your email address
3. An email from SmartE.NGEN@ctgreenbank.com will have a link to reset your password
 - a. If this email goes to your junk/spam folder, be sure to add the email address to your "safe senders" list as all NGEN communications will come from there
4. Click "Change my password" and create a new password

Submitting a New Job for Technical Approval:

1. Log-in and click the "Jobs" tab on the top of the page.
2. Click the green "New Job" button on the top right of the page and select "Smart-E Loan Job".
3. Fill in all required field marked with a red asterisk (*)
 - a. **Tip:** You can save the Job proposal as a draft before submitting by clicking "Save Progress"
 - b. In the "Equipment and Measures" section, click the blue "Browse All Equipment/Measures" and select the measure(s) proposed for the Job (for example, a natural gas boiler). Click Done.
 - i. **Tip:** The page will open to the full list of Smart-E eligible measures; however, you can filter by category (ex: heating and cooling) and subcategory (ex: boilers) on the left toolbar.
 - ii. **Tip:** If the Job has multiple measures (ex: furnace and air conditioning), those must be entered as separate measures. You can select multiple measures from the list.
4. Upload the Smart-E Utility Release Form and your company's contract/sales agreement, both must be signed by the customer. **Note: both documents must be signed with a wet/ink signature or using a program like DocuSign, typed signatures will not be accepted.**
 - a. **Tip:** A blank Smart-E Utility Release Form is available for download within the job page in NGEN. Be sure that the customer includes their full address and Electric Utility Account Number.
5. Click "Submit Job"
 - a. NGEN will alert you if any required fields were missed.
 - b. If entered correctly, NGEN will alert Smart-E Program Staff to begin technical review.

Reminders for Submitting a New Job:

1. "Cost to install" in the "Equipment and Measures" section is the cost of that item (materials, labor, etc.).
2. "Total project cost" is the sum of all measures. This amount should equal your contract price.
3. Smart-E never requires a down-payment, but the customer can choose to make one. That amount should be entered into the "down-payment" field **and** reflected in the Contract.

4. "Total amount financed" is the amount the customer wants to borrow. That should equal the total project cost minus any down-payment. The amount financed cannot exceed the project cost.
5. You cannot edit the NGEN proposal after it is submitted, so please flag any changes to the scope, cost, etc. in the "Discussions" tab so Program Staff can assist.

Submitting Completion Documents for Final Funds:

1. On the "Jobs" tab, find the Job that you have completed and click the  next to it.
2. Click the "Certificate of Completion" tab.
3. Click the bar under "Date Work Completed" and select the date from the calendar. Click "Save"
4. Select **one** of the two options under "How would you like to sign the Certificate of Completion?"

Option 1 - Electronic Signature:

1. Click the "Sign Now" button to sign the Certificate electronically.
 - a. **Tip:** You can sign from your computer, tablet or mobile phone!
 - b. Type your name in the field below the signature box. Click "Save."
2. If you are with the customer, they can sign electronically as well; **or**,
3. Click "Email Signature Request to Customer"
 - a. Customer will receive the Certificate by email with a link to sign electronically. Once they click "Save," the signed form will automatically upload into NGEN.

Option 2 – Sign Offline and Upload:

1. Under "Document," click "Print Certificate of Completion."
2. Contractor and Customer should sign and print their names on the form.
3. Click "Choose File" and select the scanned form from your computer.
4. Click the "I certify..." acknowledgement.
5. Click "Upload"

Adding a Secondary Form of Completion (required for all Jobs):

1. The Certificate of Completion lists the eligible secondary forms of completion per Job type
 - a. ex: HVAC Jobs require a copy of the passing municipal inspection report **or** a copy of the permit.
2. Click "Add File" under "Additional Completion Documents"
3. Select the file from your computer.
4. Select the document category from the dropdown box (ex: permit).
5. Click "Save Completion Document"

Job Statuses

Below is an overview of the various statuses that a Job will go through from pre-Submission to Completion.

Draft	Jobs you've started but not submitted for technical approval
Submitted	Jobs you've submitted but have not gotten technical approval
Incomplete-Returned	Jobs you've submitted but need correction - Tip: Check the Job's "Discussions" tab for details
Loan Closing	Jobs you've submitted that have received technical approval - Lender is notified by email to schedule loan closing with Customer - Tip: <u>Do not start</u> the installation at this point – the loan has not closed
Pending Completion	Jobs that have a closed loan and 1/3 loan funds have been disbursed - Contractor is notified by email that the installation can begin - Tip: Check "Loan Info" and "Disbursements" on the Job page

Completion Documentation	Jobs that have completion documents uploaded - Program Staff is notified to review/approve for final funds
Final Funds	Jobs that are waiting on the Lender to release Final Funds
Completed	Jobs that have final disbursement information entered by Lender
QA (Inspection)	Jobs that are pending inspection by the CT Green Bank