



GoGreen Home Portal Frequently Asked Questions

After I receive notification that I'm enrolled in the program, do I automatically have access to the GoGreen Home Portal? How soon can I access it?

NO, you do not automatically have access to the portal. You'll need to create a portal account by visiting https://gogreenportal.treasurer.ca.gov/users/sign_in

- Click on "New Contractor? Sign up here." This is a **different** account than the one you created to complete the GoGreen Home Program and Portal training.
- Create your Contractor Company Profile.
- Create your User Profile.
- To finish, select **"Apply to Program."** Account approval ranges from 1 to 3 business days.

How do I know if the utility bills and/or Privacy Release Form have been uploaded?

When these documents are missing, a red **"Required"** tag will appear next to them.

Customer Documents				Show Admin
ELECTRIC Utility Bill #1 (e.g. PG&E, SCE, SDG&E, SMUD)	* Required	Admin Fields	Send customer upload link	Upload Completed Document
GAS Utility Bill #2 (e.g. PG&E, SCG, SDG&E)		Admin Fields	Send customer upload link	Upload Completed Document
GoGreen Home Borrower Privacy Release Form	* Required	Admin Fields	Send customer signature link	

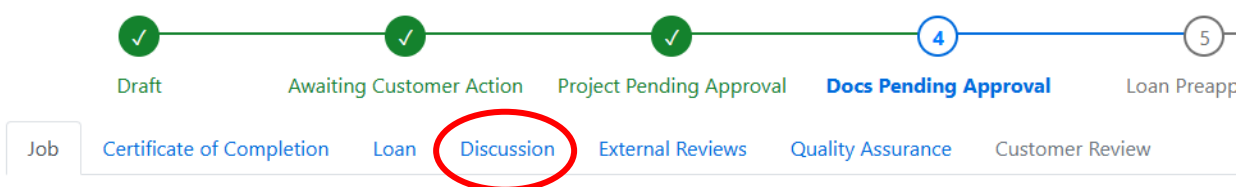
When these documents have been uploaded, a green **"Completed"** tag will appear next to them.

Customer Documents				Show Admin
Customer ELECTRIC Utility Bill #1 (e.g. PG&E, SCE, SDG&E, SMUD)	Completed	Admin Fields	Upload Completed Document	
Customer GAS Utility Bill #2 (e.g. PG&E, SCG, SDG&E)		Admin Fields	Send customer upload link	Upload Completed Document
GoGreen Home Borrower Privacy Release Form	Completed	Admin Fields	Send customer signature link	

If you want to remind your customers to submit the required documentation, you can click **"Send customer upload link."**

What if I need to update/correct my customers' information?

Enter the change details in the **Discussion** tab and the GoGreen Home team will make the update.





What can I do to get a notice to proceed quickly?

- Do NOT start entering your job information until AFTER your customer's credit application has been preapproved by their lender.
- Make sure that your customer has submitted their utility bill(s) and Privacy Release Form.

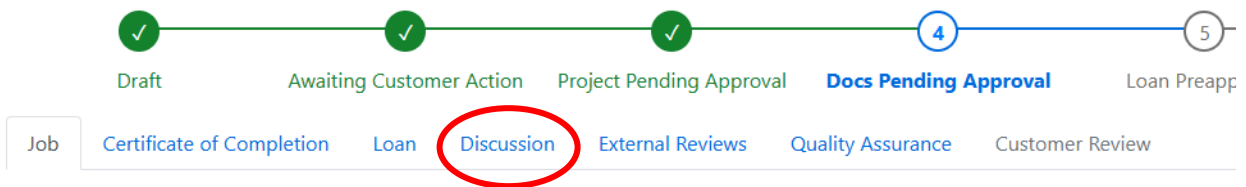
If the above instructions are followed, you can expect to receive the notice to proceed within 3 to 5 business days.

If documents/scope of work are not filled out correctly or are invalid, this may cause delays.

How do I update my job if there is a change to the scope of work/cost? And how long does it take for the changes to be approved by the GoGreen Home team?

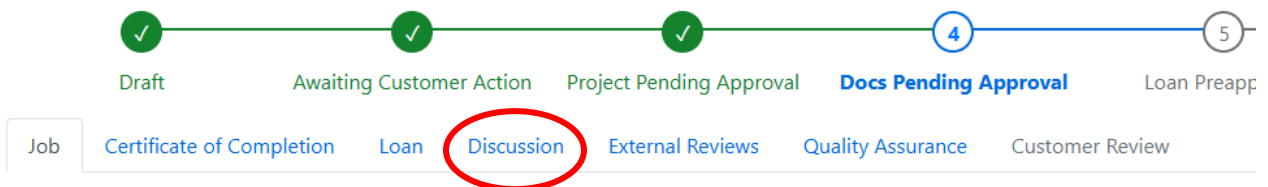
Enter the items being changed along with the associated costs in the **Discussion** tab. The GoGreen Home team will review your entry and make the needed adjustments within 1 business day.

Separately, your customer will need to confirm the adjusted loan amount with the lender.



How do I cancel a job that has been approved?

Use the **Discussion** tab to let the team know and we can archive the job.



How do I add legal/practical and other home improvement items in the portal?

“Legal and Practical” or “Other Home Improvements” can be found under the “All” category of the eligible measures list.

Add Equipment Done [Find the equipment or measure you installed and click "Add" to include it on this Job](#)

Category	Action	Equipment or Measure
All	Add to Job	AA - Legal and Practical Items that are necessary or practical for the installation of measures
Appliance	Add to Job	AA - Other Home Improvements Other home improvements that are not a qualified measure
Building Envelope		
Clean Energy		
Demand Response		
HVAC		
Lighting		