

TRADE ALLY ONBOARDING CHECKLIST



✓ Required steps to start offering Smart-E Loans

Prerequisites for attending Smart-E live online training

	Before going through these steps, make sure you are set up on our verification platform (e.g. SiteCapture). Need to get set up? Contact Energy Assurance Company (tradeallysupport@energyassurancecompany.com)
	1. Review Form 200SMFP: Smart-E Lending program agreement <ul style="list-style-type: none">Send any questions to smart-e@energytrust.org <i>Note: Don't sign or send this form during this step; you will complete it as part of step 2</i>
	2. Create a new contractor account in NGEN , the platform used to manage projects financed by Smart-E Loans: <ul style="list-style-type: none">During this step you will be prompted to sign the Smart-E Lending program agreement* directly in NGEN (this is the same form you reviewed on step 1) and submit your application to the programAfter reviewing the information provided, we'll notify you once your application has been approved
	3. Watch NGEN Tutorial Videos . Getting familiar with NGEN will make the live training easier to follow. <i>Tip: We recommend that you schedule 30 minutes for this task; progress won't be saved if the browser window is closed before watching all the videos. If link above does not work, follow these steps in NGEN:</i> <ul style="list-style-type: none">Log in to NGENClick on the <i>Training Center</i> tab on top of the screenUnder the <i>Required Trainings</i> tab, click the blue <i>Begin</i> button next to <i>NGEN Tutorial Videos</i>
	4. Confirm your attendance to the Smart-E live online training by responding to the calendar invitation emailed to you by the Energy Trust team. Or schedule an online training with the Solar team at smart-e@energytrust.org if you are not aware of an upcoming Smart-E online training.
	5. Prepare a list of any questions you may have about the Smart-E program and the NGEN platform to bring to the Smart-E live online training.

Smart-E live online training and next steps

	6. Attend a Smart-E live online training with the Solar team.
	7. Watch for your Smart-E Lending program welcome email from smart-e@energytrust.org (this process can take up to a couple of weeks after the live online training; make sure to look in your junk folder). <i>Note: you cannot begin advertising Smart-E Loans or submit Smart-E jobs until you receive this email; this is not the email you received when your application to the program was approved (step 2).</i>
	Congratulations, you are set to offer fair, transparent and affordable Smart-E Loans to your customers!

**Ink or eSign accepted, typed signatures not accepted*

If you have any questions, please send an email to smart-e@energytrust.org

More Smart-E Lending resources at:
<https://insider.energytrust.org/programs/solar/Smart-E-Lending/>

Inclusive Prosperity Capital, Inc. and Energy Trust of Oregon are working together to bring affordable, transparent solar financing to Oregon homeowners.