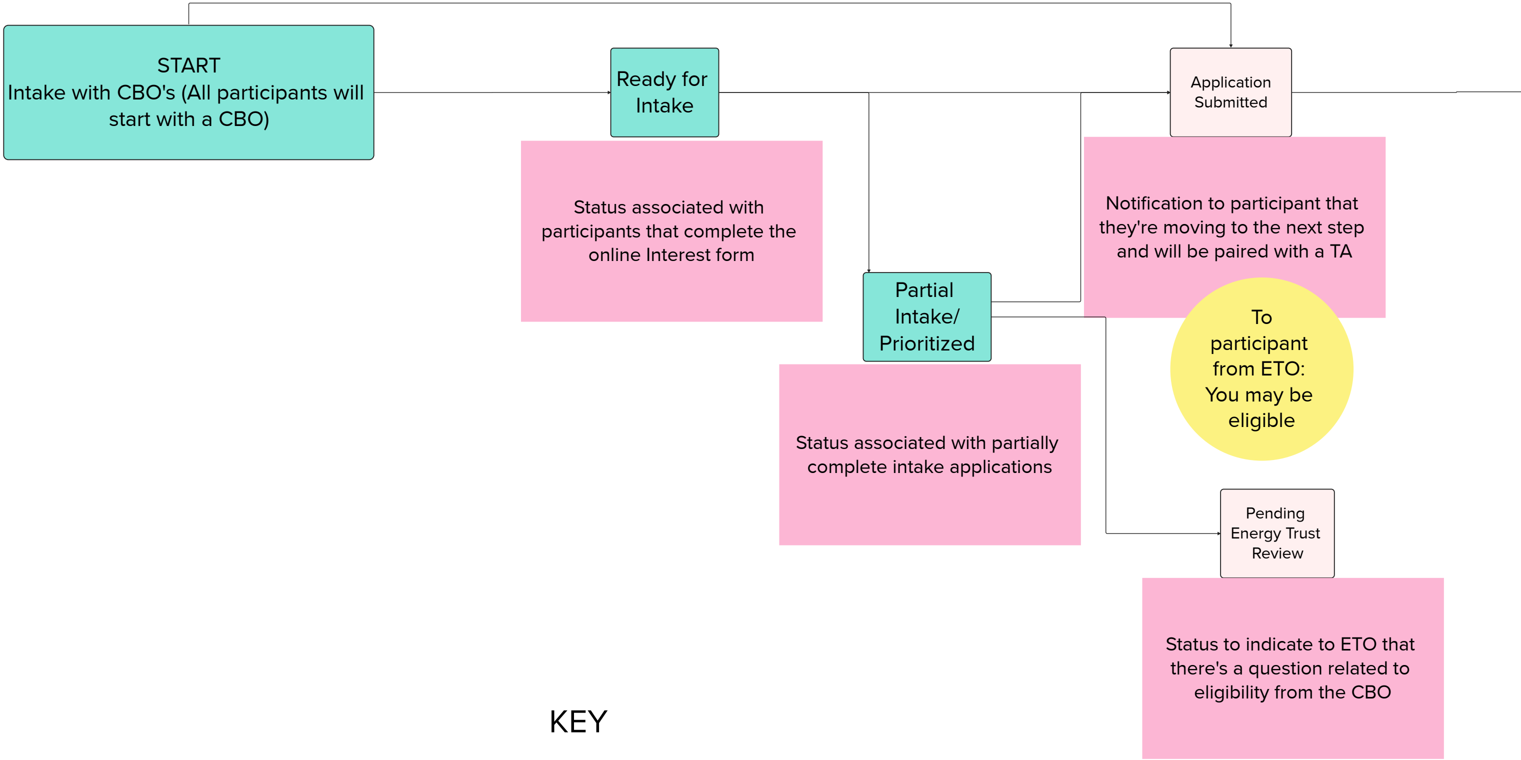
PSAP PowerClerk workflow - Leads and Residenti

Prepared for trade allies Sept. 8, 2026



START
Intake with CBO's (All participants will start with a CBO)

Ready for Intake

Status associated with participants that complete the online Interest form

Partial Intake/ Prioritized

Status associated with partially complete intake applications

Application Submitted

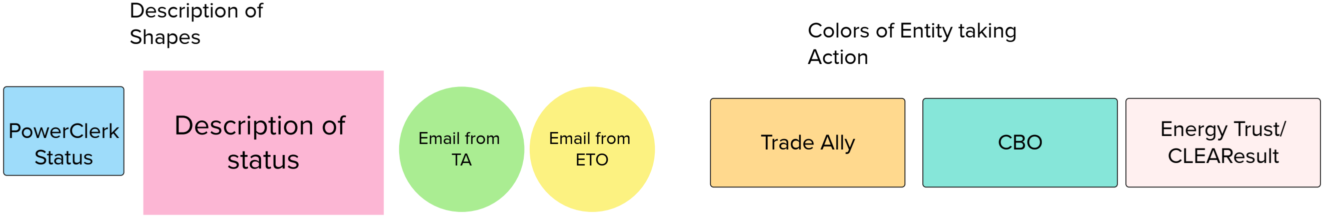
Notification to participant that they're moving to the next step and will be paired with a TA

To participant from ETO: You may be eligible

Pending Energy Trust Review

Status to indicate to ETO that there's a question related to eligibility from the CBO

KEY



Description of Shapes

PowerClerk Status

Description of status

Email from TA

Email from ETO

Colors of Entity taking Action

Trade Ally

CBO

Energy Trust/ CLEAResult

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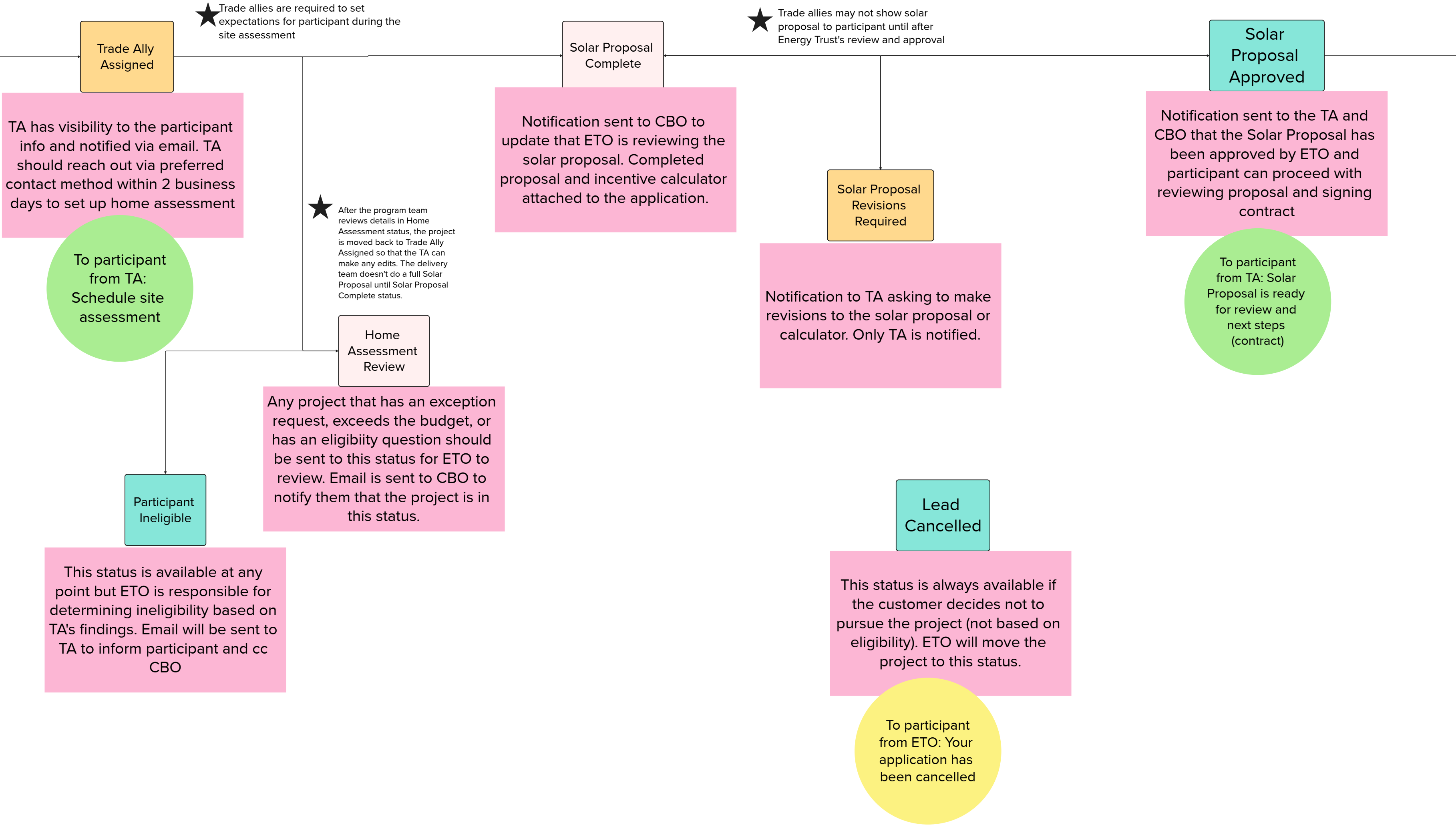


★ Trade allies are required to set expectations for participant during the site assessment

★ Trade allies may not show solar proposal to participant until after Energy Trust's review and approval

Trade Ally Assigned

TA has visibility to the participant info and notified via email. TA should reach out via preferred contact method within 2 business days to set up home assessment

To participant from TA: Schedule site assessment

★ After the program team reviews details in Home Assessment status, the project is moved back to Trade Ally Assigned so that the TA can make any edits. The delivery team doesn't do a full Solar Proposal until Solar Proposal Complete status.

Home Assessment Review

Any project that has an exception request, exceeds the budget, or has an eligibiity question should be sent to this status for ETO to review. Email is sent to CBO to notify them that the project is in this status.

Participant Ineligible

This status is available at any point but ETO is responsible for determining ineligibility based on TA's findings. Email will be sent to TA to inform participant and cc CBO

Solar Proposal Complete

Notification sent to CBO to update that ETO is reviewing the solar proposal. Completed proposal and incentive calculator attached to the application.

Solar Proposal Revisions Required

Notification to TA asking to make revisions to the solar proposal or calculator. Only TA is notified.

Solar Proposal Approved

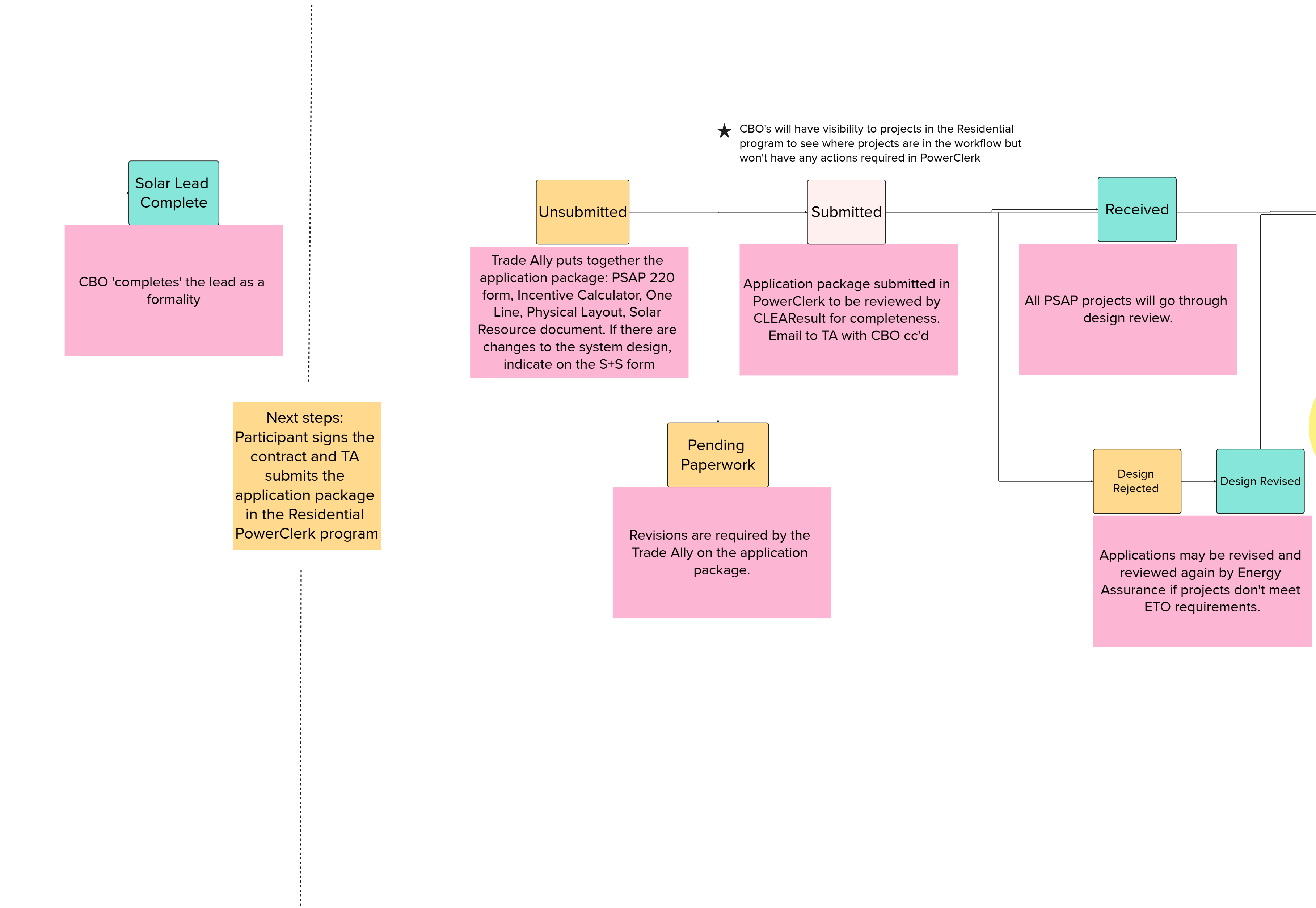
Notification sent to the TA and CBO that the Solar Proposal has been approved by ETO and participant can proceed with reviewing proposal and signing contract

To participant from TA: Solar Proposal is ready for review and next steps (contract)

Lead Cancelled

This status is always available if the customer decides not to pursue the project (not based on eligibility). ETO will move the project to this status.

To participant from ETO: Your application has been cancelled



Solar Lead Complete

CBO 'completes' the lead as a formality

Next steps: Participant signs the contract and TA submits the application package in the Residential PowerClerk program

★ CBO's will have visibility to projects in the Residential program to see where projects are in the workflow but won't have any actions required in PowerClerk

Unsubmitted

Trade Ally puts together the application package: PSAP 220 form, Incentive Calculator, One Line, Physical Layout, Solar Resource document. If there are changes to the system design, indicate on the S+S form

Pending Paperwork

Revisions are required by the Trade Ally on the application package.

Submitted

Application package submitted in PowerClerk to be reviewed by CLEAResult for completeness. Email to TA with CBO cc'd

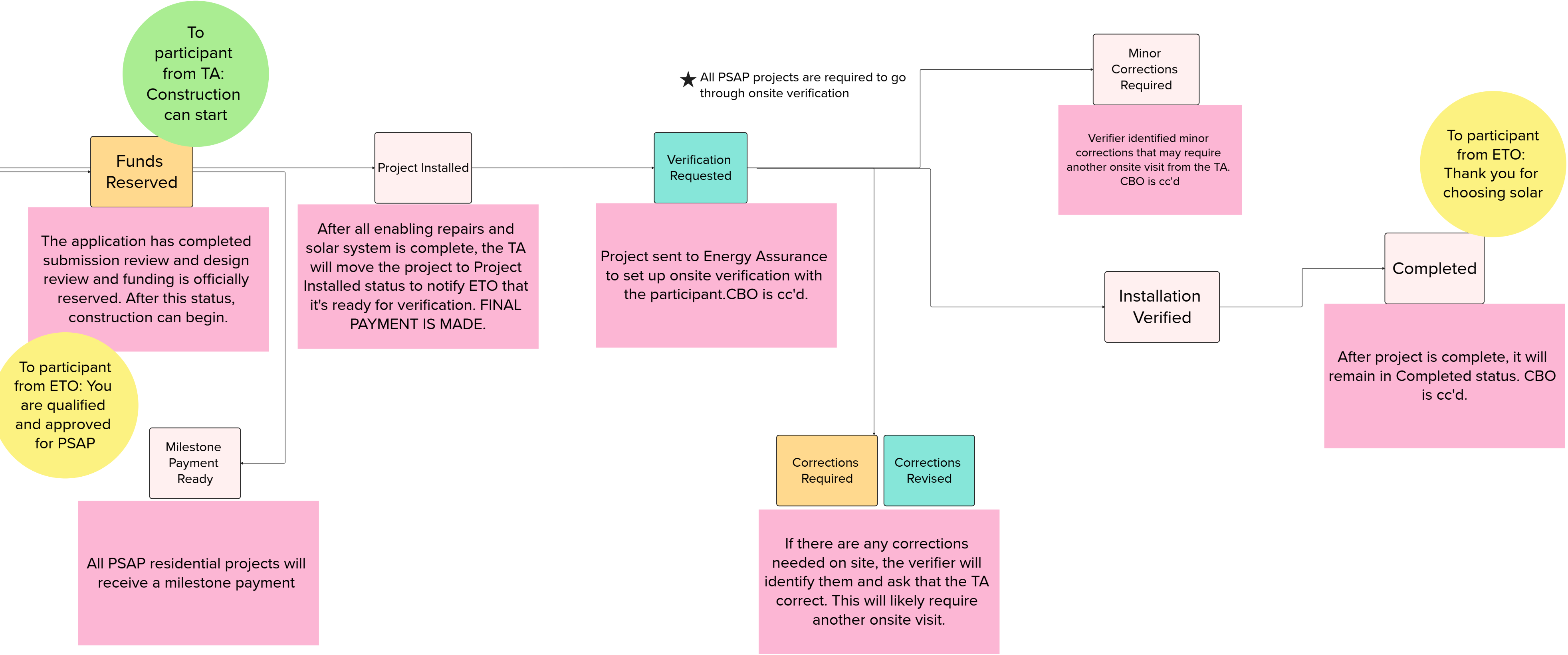
Received

All PSAP projects will go through design review.

Design Rejected

Design Revised

Applications may be revised and reviewed again by Energy Assurance if projects don't meet ETO requirements.



To participant from TA: Construction can start

Funds Reserved

The application has completed submission review and design review and funding is officially reserved. After this status, construction can begin.

To participant from ETO: You are qualified and approved for PSAP

Milestone Payment Ready

All PSAP residential projects will receive a milestone payment

Project Installed

After all enabling repairs and solar system is complete, the TA will move the project to Project Installed status to notify ETO that it's ready for verification. FINAL PAYMENT IS MADE.

★ All PSAP projects are required to go through onsite verification

Verification Requested

Project sent to Energy Assurance to set up onsite verification with the participant.CBO is cc'd.

Corrections Required

Corrections Revised

If there are any corrections needed on site, the verifier will identify them and ask that the TA correct. This will likely require another onsite visit.

Minor Corrections Required

Verifier identified minor corrections that may require another onsite visit from the TA. CBO is cc'd

Installation Verified

To participant from ETO: Thank you for choosing solar

Completed

After project is complete, it will remain in Completed status. CBO is cc'd.