

Using the Vision Database for SMUD Home Performance Program contractors

NOTE: Please include a message each time you upload additional files for a job. Leaving a message alerts us that an update has been made to this job. **BKi will not be notified of any updates unless you leave a message.**

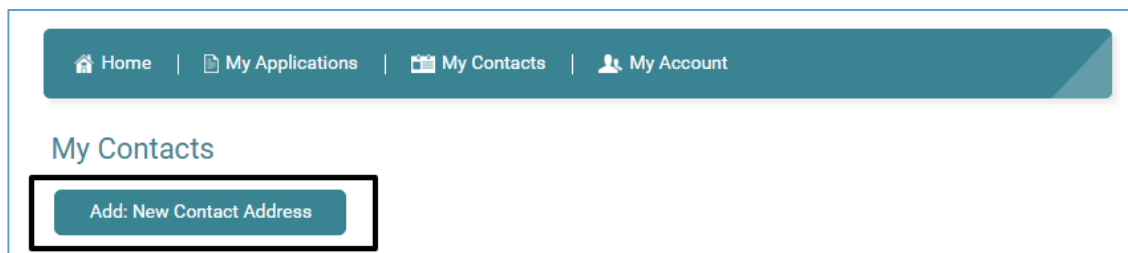
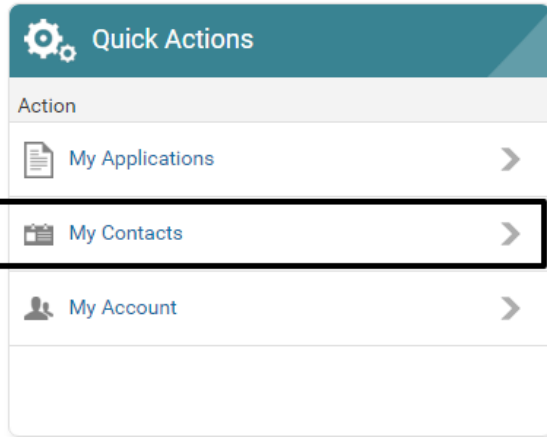
ACCESS THE VISION SYSTEM

1. Go to <http://smudhpp.programprocessing.com>
2. Click *Contractor Login* on the navigation menu
3. Enter your Email Address and Password
 - a. If you already have a login from pgesmud.programprocessing.com, your existing login information will also give you access to smudhpp.programprocessing.com
 - b. If you do not already have a login, click Create Account and enter your name, email address, and password. (Enter "000000" for the *Utility Account Number*.)
4. Click *Account Login*

The screenshot shows the contractor portal for the SMUD Home Performance Program, administered by CBPCA. The page has a dark blue header with the title "contractor portal for the SMUD Home Performance Program" and "administered by CBPCA". Below the header is a navigation menu with four items: "PROGRAM HOME", "APPLY NOW", "CONTRACTOR LOGIN", and "CONTACT US". The "CONTRACTOR LOGIN" item is highlighted with a blue box. Below the navigation menu, there are two sections: "Returning User? Please Log In:" and "New User? Please Create An Account:". The "Returning User? Please Log In:" section contains two input fields: "Email Address:" and "Password:", both with red asterisks indicating required fields. Below these fields is a blue button labeled "Account Login", which is also highlighted with a blue box. Below the "Account Login" button is a link that says "Forgot your password? Click here to retrieve it". The "New User? Please Create An Account:" section contains a blue button labeled "Create Account", which is also highlighted with a blue box.

CREATE CONTACTS

5. Click the *My Contacts* link in the Quick Actions box
 - a. Click Add: New Contacts Address



- b. **The following step is completed once per contracting company:** Create contact record for the person to be contacted about this job.
 - i. Contact type: Primary
 - ii. Name this contact: Display name for your contact record
 - iii. Contact First Name, Last Name, Address, Phone: Name and contact information for this contact record
 - iv. Click *Submit*
- c. **The following step is completed for each new job:** Create another contact record for the home being upgraded.
 - i. Contact type: Premise
 - ii. Name this contact: Display name for your contact record
 - iii. Contact First Name, Last Name, Address, Phone: Name and contact information for the resident of this home
 - iv. Click *Submit*

CREATE A NEW JOB

6. Click *Submit Home Performance Job* on the navigation menu and click on *Begin Application*

SUBMIT MENTORING REQUEST	SUBMIT HOME PERFORMANCE JOB	CONTRACTOR LOGIN	CONTACT US
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[Click Here For Instructions](#)

Are you ready to begin your application?

[BEGIN APPLICATION](#)

7. Assign Application Contacts

- Primary Contact: Select contact to whom you want communication about this job to be sent
- Premise Contact: Select owner of home that is being upgraded. (Note: Premise Contacts are listed alphabetically by customer last name.)
- Contractor Contact: Select your contractor company name from the provided drop-down menu
- Click *Submit*

Assign Application Contacts:

The first step in submitting an application is selecting the Contacts for your project. Please select the appropriate contacts from the dropdown lists below.

IMPORTANT: If the appropriate contact is not listed, Please click the "Add New Contact" button to enter the new contact before proceeding. You will not have the opportunity to edit this information on the application later.

[Add New Contact](#)

Please select your primary contact address. This is where all contact regarding this application will be sent:

PRIMARY CONTACT:

*

Please select the premise contact for this application. The premise is the physical location of the project:

PREMISE CONTACT:

*

Please select the contact information for the contractor who will be performing the installations referred to in this application:

CONTRACTOR CONTACT:

*

[Submit](#)

NOTE: All automatic emails sent through the Vision system will be sent to the email address listed as the Primary Contact. If no email address is listed as the Primary Contact, no one at your company will receive notifications when a job status is updated or when revisions are needed. Ensure that the email address listed as the Primary Contact belongs to the person who will be managing notifications for this job.

8. Select Submittal Mechanism: Attach Excel File

- a. Scroll to the bottom of the page and click *Continue*

The image shows a screenshot of a web form titled "Submittal Mechanism". The form has a header bar with the title. Below the header, there is a dropdown menu labeled "Submittal Mechanism" with "Attach Excel File" selected. A large blue arrow points downwards from this section to another part of the form. In the lower part of the form, there is a "CONTINUE" button highlighted with a green box.

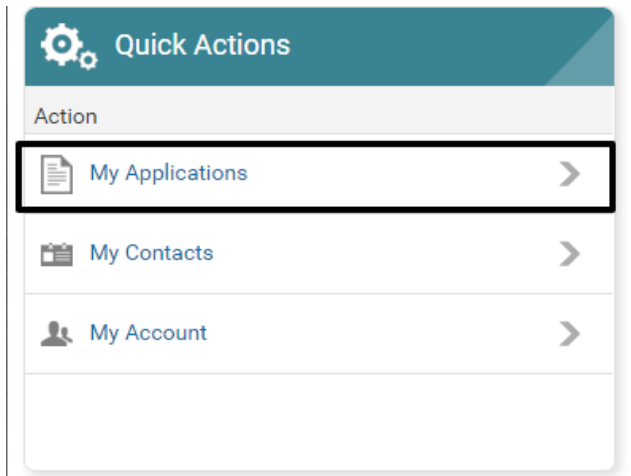
NOTE: Do NOT fill out the job data using the online form on this page. All job data should be entered in the Job Reporting Template (JRT), and the JRT should be uploaded to the system as shown below.

The image shows a screenshot of a web form titled "Account Holder/ Property Owner Information". The form contains several input fields for: Property Owner First Name*, Property Owner Last Name*, Property Owner Mailing Street Address*, Property Owner Mailing City*, Property Owner Mailing State*, and Property Owner Mailing Zip*. A large red 'X' is drawn over the entire form, indicating that this information should not be entered into the online form.

COMPLETE PRE-UPGRADE TASKS FOR JOB

NOTE: If the upgrade project is completed within two weeks after work starts, you can submit all complete post-upgrade documentation with your initial submission, instead of submitting the preupgrade and post-upgrade documentation separately.

9. Click the *Contractor Login* tab to view all applications
 - a. Click on *My Applications* under the *Quick Actions* box, to upload documents



My Submitted Applications

Program	Projectname	Contact	Project #	Created	Status	Action
SMUD HPP		SEQUEIRA, ANISHA	PSSHPS1532007696	FEB-12 2016 1:05PM	APPLICATION CANCELLED	[View]

10. You will be directed to the page displaying all details for that project. Click on *Document & Files* in the top navigation bar to view tasks and upload documents. Click the blue icon on the right for each item under the *Current Tasks* section and upload documents.
- Job Reporting Template:** Upload completed pre-upgrade Job Reporting Template Excel spreadsheet. (If the project is already complete, you can upload the completed post upgrade Job Reporting Template.)
 - Additional documentation (optional):** Upload any additional documentation necessary for this job. If you have more than one document you want to submit, combine them into a single .zip and upload that one file.
 - Once you upload all the required documents there should be no tasks listed in the Current Tasks section.

Current Tasks

Below are outstanding tasks you currently need to complete. Click on the icon to the right of each task to perform the required activity.

- Document Upload: Job Reporting Template**
Assigned to: Customer
Created: 2/26/2016 12:26:05 PM
- Document Upload: Additional Documentation (Optional)**
Assigned to: Customer
Created: 2/26/2016 12:26:05 PM

11. Leave a message to alert BKi that a new job has been submitted
 - a. Click on the Send Us a Message button in the messages section above Current Tasks
 - b. Type your message, and click Submit

All communication about jobs will take place within the Vision system using the *Messages* function. BKi will also leave messages for you using this feature.

NOTE: Please include a message each time you upload additional files for a job. Leaving a message alerts us that an update has been made to this job. **BKi will not be notified of any updates unless you leave a message.**

COMPLETE POST-UPGRADE TASKS FOR JOB

Once your pre-upgrade submission has been logged and reviewed, BKi will update the status of that job to *Project Received*. BKi will leave notes in the *Messages* tab if additional clarifications are needed with the post-upgrade submission. This status change will trigger an automated email to be sent to the primary contact's email account. This will also unlock new workflow items that you will use to submit your post-upgrade documentation.

When the upgrade work is completed, you will use the Vision system to submit your post-upgrade documentation for that job. Use the following steps to submit your post-upgrade documentation. (A similar process is used to submit responses to review comments.)

12. Go to the *Applications* tab in the Program Application Center and click *View* next to the job for which you want to upload post-upgrade documentation
13. Click the *Your Tasks* tab to view the workflow items associated with that job.

- a. Note that the status of the job has been updated to *Project Received* and new workflow items have been activated for that job.
14. Submit your post-upgrade documentation using the same steps used to upload pre-upgrade documentation.
 - a. **Job Reporting Template (post-upgrade):** Upload completed pre-upgrade Job Reporting Template Excel spreadsheet. NOTE: the pre-upgrade JRT does not need to contain test-in information unless the job has had an Assessment Subsidy or if the job is being financed.
 - b. **PG&E Test Measurement Form (post-upgrade):** Upload completed PG&E Test Measurement Form (PDF).
 - c. **SMUD Rebate Application:** Upload signed and scanned SMUD Rebate Application. The SMUD rebate cannot be processed unless this form is signed by both the customer and contractor.
 - d. **Photographs of deep buried ducts (if ducts were buried):** These photographs help BKi and Efficiency First California confirm that the SMUD HPP Deep Buried Duct Protocols were followed.
 - e. **Attach Supporting Information:** Upload any additional documentation necessary for this job. If you have more than one document you want to submit, combine them into a single .zip and upload that one file.
 - f. The brown question mark icon will switch to a green check mark when each task is completed. You might need to click “Refresh” above the “Action” column to view this update.
 15. Leave a message to alert BKi that the post-upgrade documentation has been submitted
 - a. Click on the Send Us a Message button in the messages section above Current Tasks
 - b. Type your message, and click Submit

LOG OUT OF THE VISION SYSTEM

16. Exit the Application by closing your Browser

FINDING JOBS IN THE VISION SYSTEM

As the number of your jobs in the Vision system increases, it may become harder to locate specific jobs in the database, especially if you have so many jobs that they don't all fit on one page of the *Applications* tab of the *Program Application Center*.

Here are some ways to locate a job in the system:

17. Search by project status
 - a. On the *Home* page of the *Program Application Center*, there is an Application by status box. Click on the Status name to view all projects in that status.

Status	# of Apps
Application Cancelled	4
Canceled By Contractor/Homeowner	1
Rebate Approved	1

A list of applicable jobs will appear below.

Home
My Applications
My Contacts
My Account

All Applications in status: Application Cancelled

Program	Projectname	Contact	Project #	Created	Status	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			Search Reset
SMUD HPP		SEQUEIRA, ANISHA 123 TEST STREET	PSSHPS1532007696	FEB-12 2016 1:05PM	APPLICATION CANCELLED	[View]
SMUD HPP			PSSHPS1525855549	MAR-19 2012 3:11PM	APPLICATION CANCELLED	[View]
SMUD HPP			PSWHPS1525805213	FEB-24 2012 3:43PM	APPLICATION CANCELLED	[View]
PERFORMANCE (ADVANCED) WHOLE HOUSE RETROFIT			PSWHPS1525802425	FEB-23 2012 5:13PM	APPLICATION CANCELLED	[View]

Page: **1**
<Page 1> Viewing 1 - 4 of 4 Records

18. Locate by Vision Project number or Contact Address

- b. When you receive email notifications from the Vision system (donotreply@programprocessing.com), the email subject line will include the Vision project number

- i. If BKi has left a note for you in the *Messages* tab, the email subject line will be “Changes have been made to Project # PSSHPSXXXXXXXXXX”
 - ii. If the job status has been updated, the email subject line will be “Project # PSSHPSXXXXXXXXXX”
 - iii. The “PSSHPSXXXXXXXXXX” code is the Vision project number
- c. On the *Submitted Applications* tab of the *Program Application Center*, look under the *Project #* column for the job that matches that Vision project number

CHECKING FOR MESSAGES IN THE VISION SYSTEM

BKi will communicate to you with specific questions about jobs using the *Messages* function in the Vision system. There are two ways you will be notified each time BKi leaves a message: The primary contact will receive an email, and a message notification will appear on the *Welcome* tab of the *Program Application Center*.

19. Message notifications by email

- a. If BKi has left a note for you in the *Messages* tab, the email address affiliated with the primary contact for that job will receive an email with the subject line “Changes have been made to Project # PSSHPSXXXXXXXXXX”
- b. That notification email will be sent from donotreply@programprocessing.com; add this email address to your list of approved email contacts so these email notifications are not blocked as SPAM.

20. Message notifications in the *Program Application Center*

- c. Each time you log in to Vision, the *Home* tab of the *Program Application Center* will list all the jobs for which there are new messages since you last logged in
- d. Click each project number to read the message left for that job

