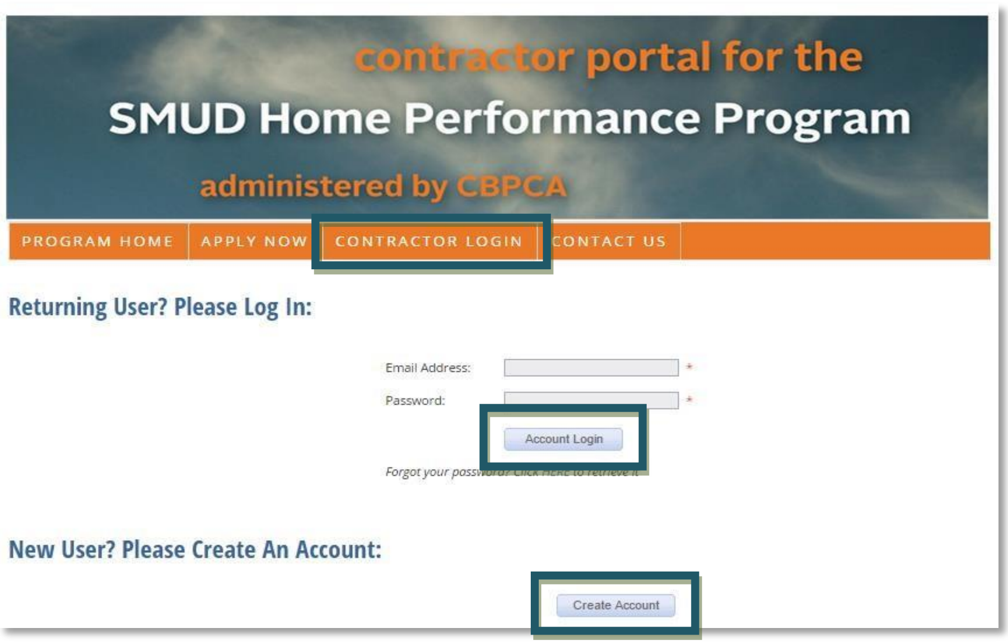
Using the Vision Database for SMUD Home Performance Program contractors

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.**

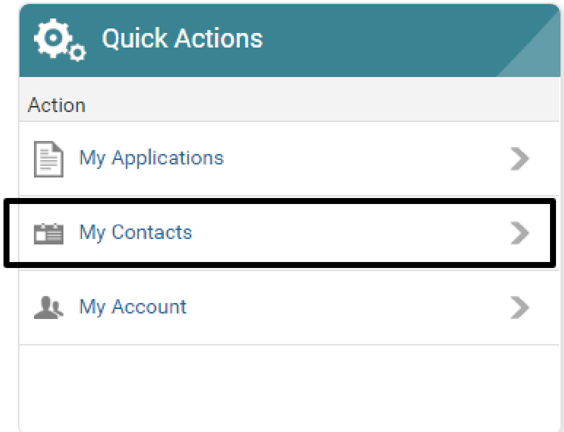
ACCESS THE VISION SYSTEM

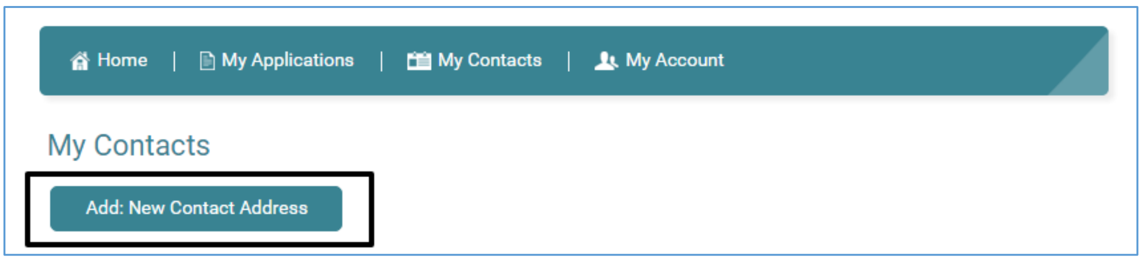
1. Go to **http://smudhpp.programprocessing.com**
2. Click *Contractor Login* on the navigation menu
3. Enter your Email Address and Password
    a. If you already have a login from pgesmud.programprocessing.com, your existing login information will also give you access to smudhpp.programprocessing.com
    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*



CREATE CONTACTS

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



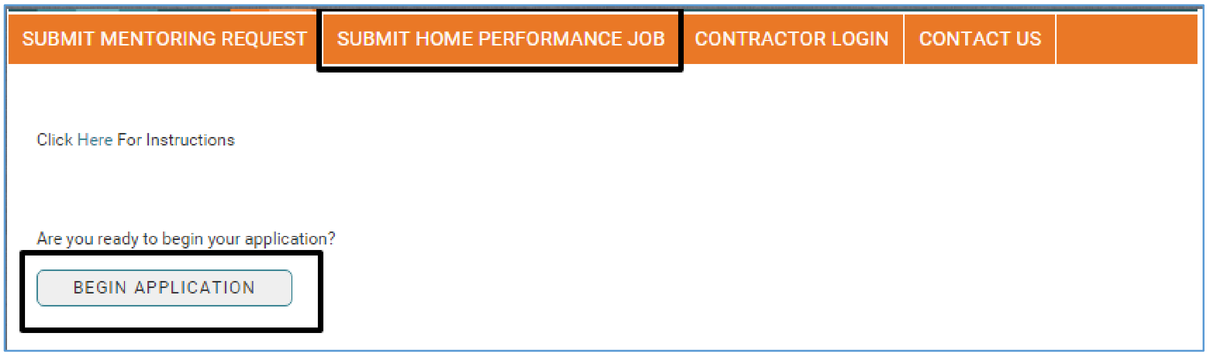


b. ***The following step is completed once per contracting company:*** Create contact record for the person to be contacted about this job.
   i. Contact type: Primary
   ii. Name this contact: Display name for your contact record
   iii. Contact First Name, Last Name, Address, Phone: Name and contact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

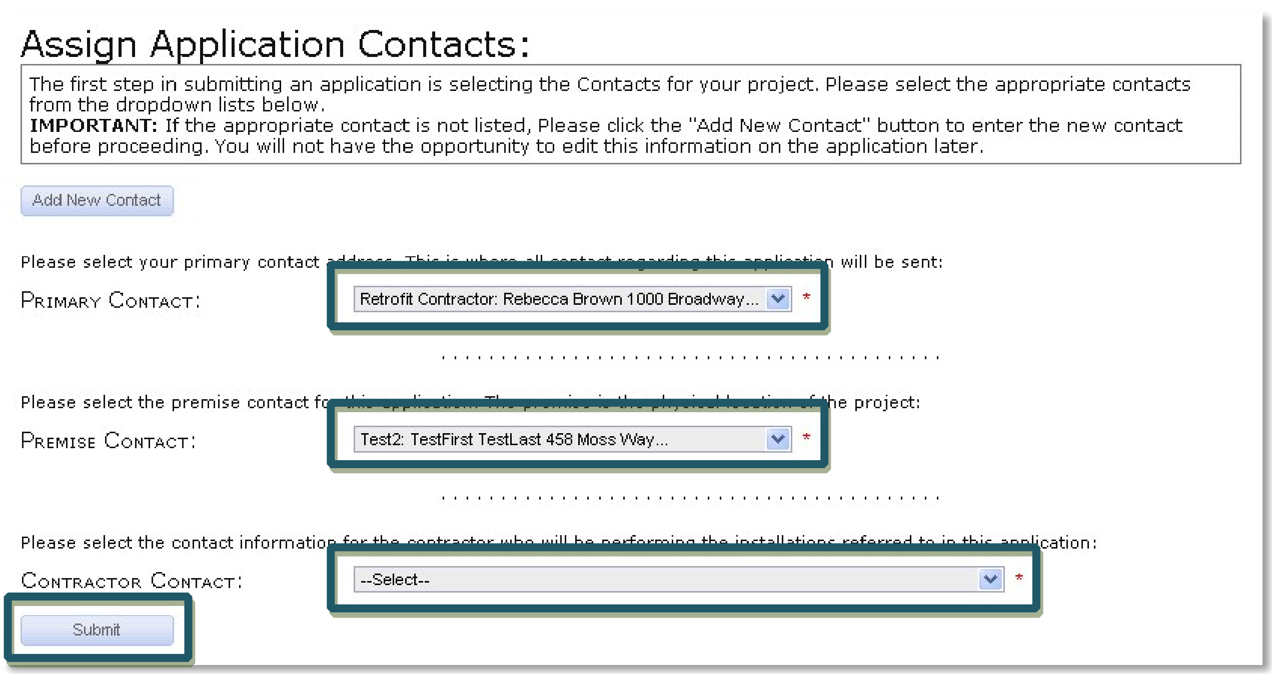
c. ***The following step is completed for each new job:*** Create another contact record for the home being upgraded.
   i. Contact type: Premise
   ii. Name this contact: Display name for your contact record
   iii. Contact First Name, Last Name, Address, Phone: Name and contact information for the 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*



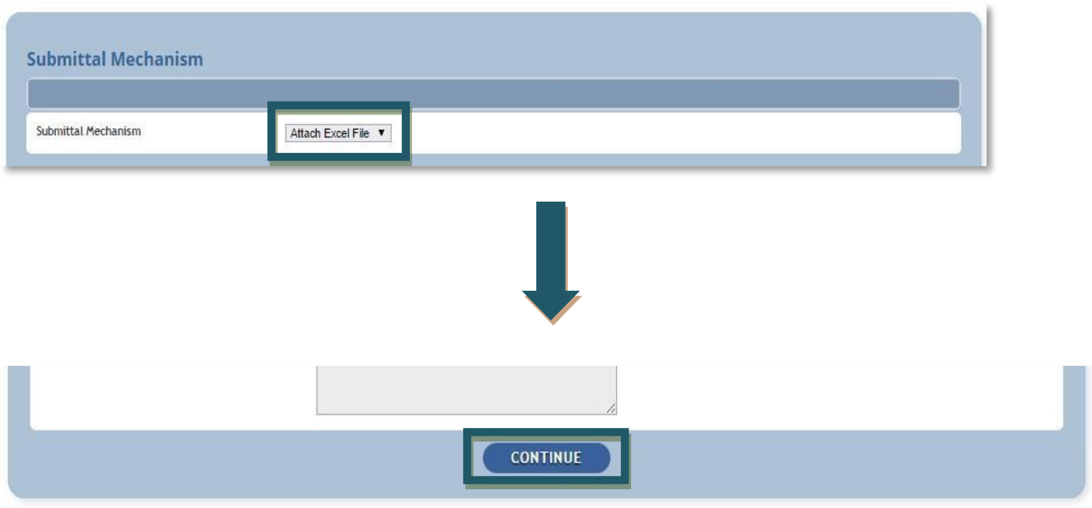
7. Assign Application Contacts
    a. Primary Contact: Select contact to whom you want communication about this job to be sent
    b. Premise Contact: Select owner of home that is being upgraded. (Note: Premise Contacts are listed alphabetically by customer last name.)
    c. Contractor Contact: Select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



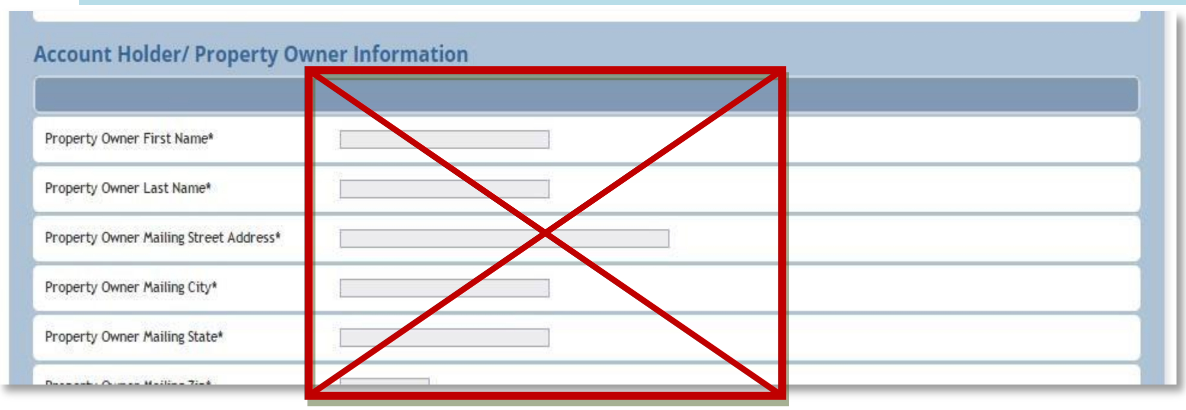
NOTE: All automatic emails sent through the Vision system will be sent to the email address listed as the Primary Contact. If no email address is listed as the Primary Contact, no one at your company will receive notifications when a job status is updated or when revisions are needed. Ensure that the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



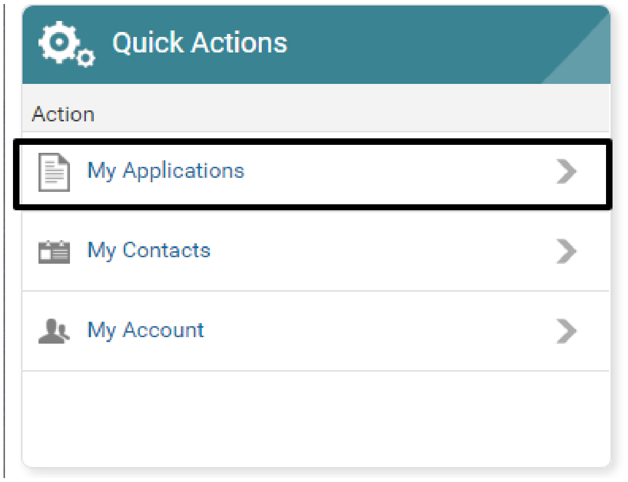
NOTE: Do NOT fill out the job data using the online form on this page. All job data should be entered in the Job Reporting Template (JRT), and the JRT should be uploaded to the system as shown below.

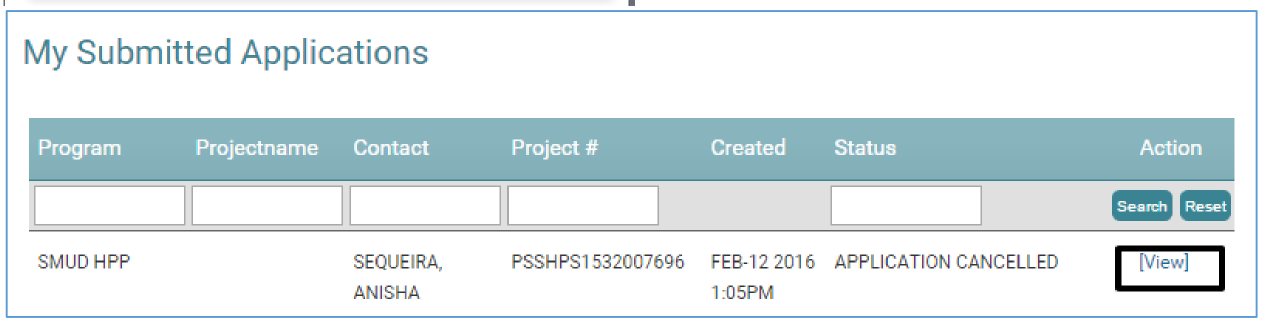


COMPLETE PRE-UPGRADE TASKS FOR JOB

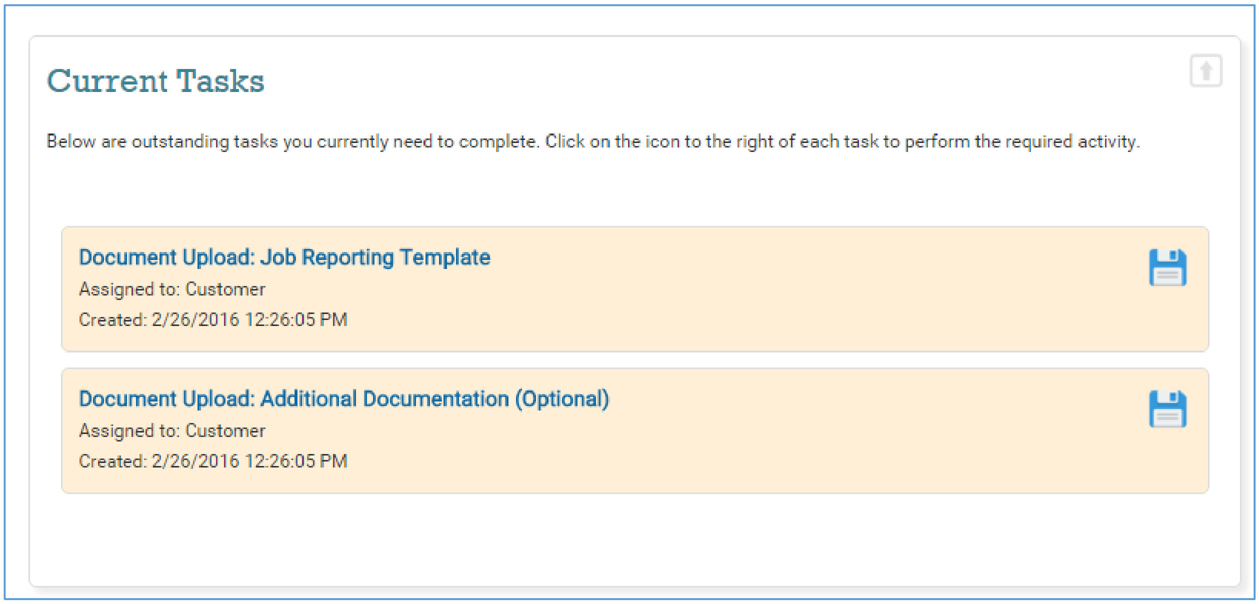
NOTE: If the upgrade project is completed within two weeks after work starts, you can submit all complete post-upgrade documentation with your initial submission, instead of submitting the preupgrade and post-upgrade documentation separately.

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





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.
    a. **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.)
    b. **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.
    c. Once you upload all the required documents there should be no tasks listed in the Current Tasks section.



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

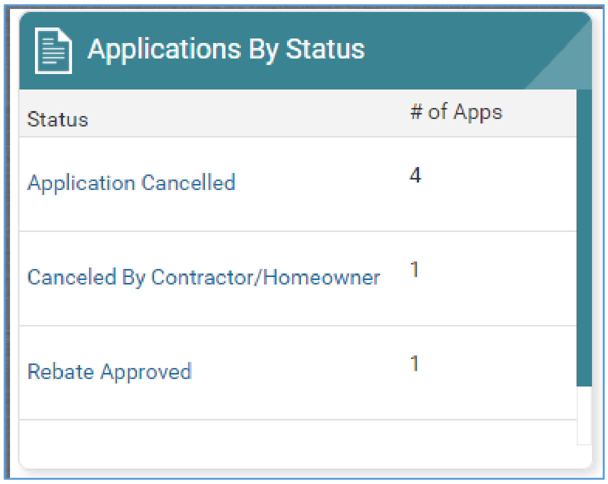
16. Exit the Application by closing your Browser

FINDING JOBS IN THE VISION SYSTEM

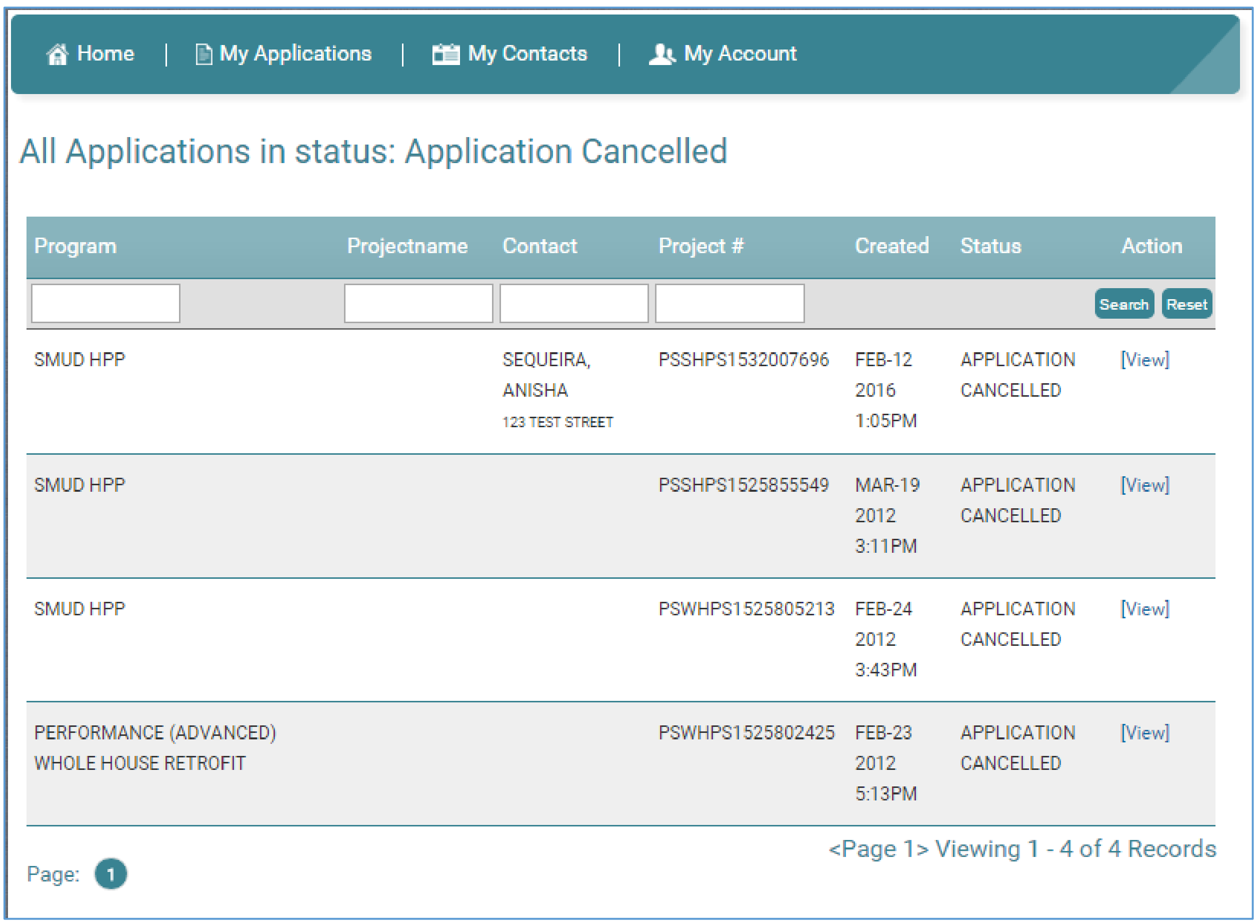
As the number of your jobs in the Vision system increases, it may become harder to locate specific jobs in the database, especially if you have so many jobs that they don't all fit on one page of the *Applications* tab of the *Program Application Center*.

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.



A list of applicable jobs will appear below.



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