

## VelocityGO Placeholder Status Change

You have likely encountered the placeholder status of "reviewed" when a placeholder document is not acceptable. We realized this created some confusion so you will now see this status changed to "exception". Exception simply means that the uploaded document has been reviewed and something more is needed. This will not impact how you can interact with the placeholder and you will still be able to upload to the placeholder like before. This new functionality will allow us to automatically initiate an email to the customer notifying them of the review and allows them to see exactly what is still needed when they log into the portal. Here are a few examples we have compiled to demonstrate how this change will appear in VelocityGO.

## What you see in the Contractor Portal:

Below is an example of what you will see in document manager when an item is placed into "exception". In the comments section associated with the document, you will be able to see what is still needed.

	STATUS	NAME 🕈	RELATIONSHIP	LAST MODIFIED DATE
		Application		6/12/2023
	Drag & Drop Drop your file (less than 500 <u>browse</u>		Document Details  * Name Application Category Application Exception Date 6/12/2023 Description Signed and dated application	Relationship Date Needed By Stage None Owner Borrower
Uple	oad File Portal Options M	lore Options		
	UMENT ACTIVITY Dannee Livingston-DeTis 6/12/2023 1:30 PM Please provide your mos		nin the last 30 days.	

## What a customer will see:

Below is an example of an email that a customer will receive when a placeholder on their application is placed into "exception" status.

Hi Mary,
Something's not right with the following document:
Categorical
It might be the wrong file, too difficult to read, or the wrong format. Log in and take a look so we can get you an official offer.
Replace Documents
If you have trouble with the button, use this link:
https://slipstream2preprod.sandbox.my.site.com/NY
Give us a call at (800) 861-1929 with any questions.
- The Team at Slipstream's Energy Finance Solutions
Slipstream's Energy Finance Solutions slipstream.donotreply@slipstreaminc.org

When the customer follows the portal link they received in the email shared above, this is what they will see in the portal on their application.

Upload Documents	10 ~
Categorical NYSERDA - On Bill Recovery Loan (\$20000.00) If you are currently eligible for additional assistance through a program like SNAP or Supplemental Security, we can simplify your application process. Simply provide your current approval letter or statement here. For a full list of eligible programs by state, visit the EFS website.	DRAG & DROP
OUT OF DATE         Returned:       10.filenumber_app.pdf         Please provide your most recent letter dated within the last 30 days.         X       Returned 6/8/2023	