



Energy Finance Solutions
VelocityGO Procedures

Automatic System Notifications

Procedure #	63.00
Revision #	8.0
Implementation Date	10.30.2023
Approved By:	Robin

Role All

Customer Notifications

Criteria	Subject Line	Text
Customer Starts Online Application Process	Welcome	<p>Welcome to Slipstream's Energy Finance Solutions lending portal!</p> <p>You have started the online application process. Now it is time to log in and get started.</p> <div style="text-align: center;"> <p>Click Here to Login</p> </div> <p>If you have trouble with the button, use this link:</p> <p>With our lending portal it's easy to access, review or update your loan information twenty-four hours a day, seven days a week.</p> <p>You can even click on the link to return to your application. We are also here to answer questions or concerns regarding your application.</p> <p>If you need assistance, please give us a call at (800) 861-1929.</p>
When main borrower adds an additional Borrower/Guarant or to an Online application	You've been added as a additional applicant on an Online Application	<p>You have been added as an additional applicant on an online application with Slipstream's Energy Finance Solutions.</p> <p>To fully process the application, we need some personal information from you. Please access our secure online portal to provide your personal information including address, date of birth, and social security number. In some cases, you may need to provide income information.</p> <p>You will receive a welcome email from slipstream.donotreply@slipstreaminc.org with a link to set up a new account in our system. Please follow the link in that email to enter requested information.</p> <p>If you believe you have received this email by mistake, or if you have any questions, give us a call directly at (800) 861-1929.</p>
When a Contractor submits an application on behalf of a Customer	Notification of Submission to Slipstream	<p>Welcome to Slipstream's Energy Finance Solutions (EFS)!</p> <p>We received an application that was submitted on your behalf by your contractor, and we are processing the application. We will provide additional information regarding eligibility and notify you of your application status as soon as it is processed.</p> <p>If you wish to manage your application online, please send an email to efs@energyfinancesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application.</p>

Offer is generated	EFS Loan Preapproval Confirmation - [Customer Last Name] - [Loan Number]	<p>Congratulations! Your Slipstream Energy Finance Solutions (EFS) loan application has been preapproved. If you applied online, you can login to the customer portal to learn about the next steps in the loan process and to upload any required documents in support of your loan application.</p> <p>If you submitted a paper application, or your contractor submitted the application on your behalf, contact your contractor for next steps.</p> <p>If you wish to manage your application online and do not have a login, please send an email to efs@energyfinancesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application.</p>
Customer portal applications where 10 days have elapsed since the offer was generated and has not been selected yet	Please select an offer on your Slipstream Application	<p>Congratulations, your Slipstream Energy Finance Solutions (EFS) loan is preapproved.</p> <p>We are pleased to provide you with the opportunity to select the loan offer that best meets your needs. Please login to our portal to view your options and select the one that you prefer. Once you have made a selection, your loan will be able to advance through the preapproval process.</p>
Status changes to "Pending"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	<p>The status of your application with Slipstream Energy Finance Solutions (EFS) has changed. More information may be needed before we can issue a decision regarding your loan request. If you applied online, you can login to the Slipstream EFS portal and navigate to the To Do List on the Dashboard to see what information is required.</p> <p>If you submitted a paper application, or your contractor submitted the application on your behalf, contact your contractor for next steps.</p> <p>If you wish to manage your application online and do not have a login, please send an email to efs@energyfinancesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application.</p>
Status changes to "Subsidy Qualified"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	<p>The status of your subsidy application with Slipstream Energy Finance Solutions (EFS) changed to Subsidy Qualified. If you applied online, you can login to the Slipstream portal to see if any additional information is required.</p> <p>If you submitted a paper application, or your contractor submitted the application on your behalf, contact your contractor for next steps.</p> <p>If you wish to manage your application online and do not have a login, please send an email to efs@energyfinancesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application.</p>
Pre-Approval Expiration	PreApproval Expiration – Customer	<p>Your Slipstream Energy Finance Solutions (EFS) loan preapproval is about to expire. Please submit the remaining items needed to prevent the preapproval from expiring. If you applied online, you can login to our website to view the borrower conditions needed and upload the documents requested. If you submitted a paper application, you should have received an email from Slipstream EFS with a letter documenting the missing information. You can mail or fax the missing information to Slipstream EFS.</p> <p>If you wish to manage your application online and do not have a login, please send an email to efs@energyfinancesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application.</p>

Applicant Placeholder Added	New Placeholder Added	<p>After a review of your Slipstream Energy Finance Solutions (EFS) application, we have determined additional documents are needed from you before your application can receive final approval. If you have an account set up, you can login to learn what additional information is required and upload the documentation needed to support your application. If you do not have an online account, please contact Slipstream EFS to identify what is needed.</p> <p>If you wish to manage your application online and do not have a login, please send an email to efs@energyfinancesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application.</p>
Waiting on Contractor	Customer info complete, pending contractor docs	Thank you for submitting the required documentation for your loan with Slipstream Energy Finance Solutions (EFS). At this time, no further information is required of you, only of your contractor. Upon receipt of the required documentation from the contractor, your loan will go through the final approval process.
Status changed to "Approved"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with Slipstream Energy Finance Solutions has changed. Your loan request has received final approval! Please look for an email and follow the instructions provided to sign the document electronically.
Sign Loan Docs 10 days	Following on Loan Documents Sent 10 days ago	Your loan has received final approval and is awaiting your signature to finalize the documents. Please look for the email from DocuSign with instructions on how to sign your documents electronically. If you wish to manually sign your documents, please send an email to efs@energyfinancesolutions.com to request a set to be sent to you for manual signature.
Sign Loan Docs 20 Days	Following on Loan Documents Sent 20 days ago	Your loan has received final approval and is awaiting your signature to finalize the documents. Please look for the email from DocuSign with instructions on how to sign your documents electronically. If you wish to manually sign your documents, please send an email to efs@energyfinancesolutions.com to request a set to be sent to you for manual signature.
Approval Expiration	Approval Expiration – Customer	<p>Your Slipstream Energy Finance Solutions (EFS) loan approval is about to expire. Please submit the remaining items needed to prevent the approval from expiring. If you have an online account with us, you can login to view the items needed and upload document(s) requested. If you do not have an online account, please contact Slipstream EFS to identify what is needed.</p> <p>If you wish to manage your application online and do not have a login, please send an email to efs@energyfinancesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application.</p>
Status changed to "Paid"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with EFS has changed. The loan amount, as indicated in your documents, has been paid in full to your contractor. Shortly, you will be emailed a Goodbye Letter containing information regarding the due date of your first loan payment and your loan servicer. Thank you for working with Energy Finance Solutions!
Status changed to "Withdrawn"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with EFS has changed. Your application has been withdrawn. This change may have occurred per your request or may indicate that your loan application has expired. For more information, or if you would like to reactivate your application, please call, or email your loan specialist.
Status changed to "Declined"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with EFS has changed. EFS was unable to approve your loan request. For information regarding the factor(s) that led to this decision, please login to the EFS portal or refer to the Adverse Action letter.
Customer clicks the "Forgot Password" button on portal	Forgot Password	Per your request, we have sent you a link to reset your password for Slipstream's Energy Finance Solutions.

		<p>Reset your password</p> <p>If you have trouble with the button, use this link:</p> <p>If you have any questions or concerns, or if you did not intend to reset your password, please give us a call at (800) 861-1929.</p>
Customer successfully updates password	Password successfully changed	<p>Your password has been reset for Slipstream's Energy Finance Solutions.</p> <p>To reset your password, visit https://slipstream2--preprod--nportal.visualforce.com/apex/PortalForgotPassword, or contact your financial institution at (800) 861-1929.</p> <p>Thanks!</p>

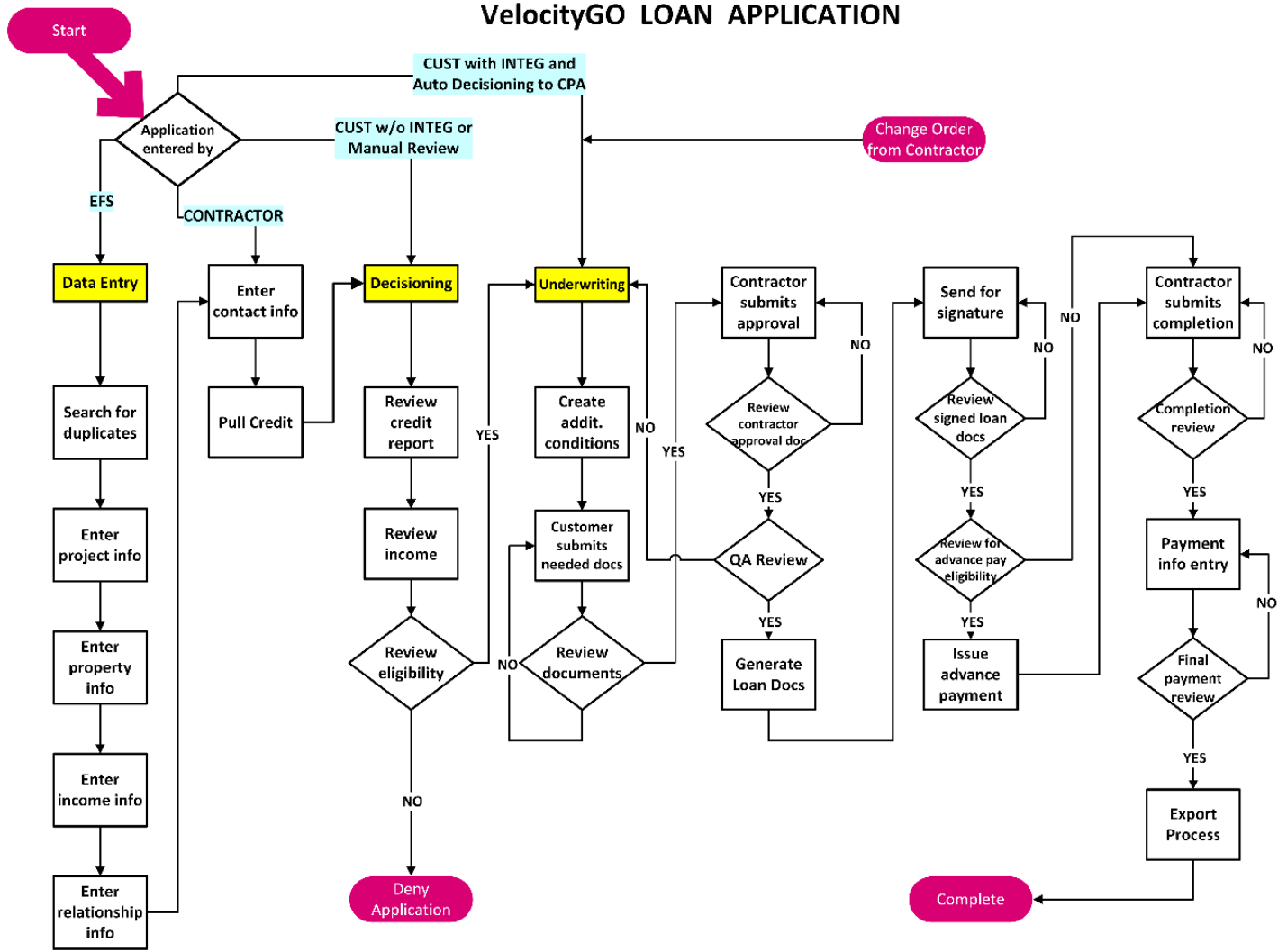
Contractor Notifications

Criteria	Subject Line	Text
When offer is generated	EFS Loan Preapproval Confirmation - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. The loan application has been preapproved. Please login to the EFS website to learn about the next steps in the loan process and to upload any required documents to receive final approval.
Status changes to "Pending"	EFS Loan Preapproval Confirmation - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. This application requires further review by Slipstream Energy Finance Solutions staff, which will be completed within one business day from the date that the customer submitted the application. You will receive an email when the status of the application is updated. For more information, please login to your website. Thank you for your patience and we will be in touch soon.
Pre-Approval Expiration	PreApproval Expiration – Contractor	The Slipstream Energy Finance Solutions (EFS) loan preapproval for your customer, ((Insert Primary Borrower Full Name)), is about to expire. Please login to our portal to view the items needed and upload any required documents designated as conditions to be provided by the contractor.
Contractor Project Approval/Contact	Pending Work Scope Documents	In order to fully approve the loan for your customer, <<insert primary applicant name>>, Slipstream Energy Finance Solutions (EFS) must receive all required work scope documentation. Please login to the contractor portal and upload all the required work scope documents.
Status changed to "Approved"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. The loan request has received final approval! Your customer has opted to use electronic signature and will receive a separate email from DocuSign with instructions for signing the document electronically. You can view the status of the documents on the loan Document Manager on the Slipstream Energy Finance Solutions website. Please login, click on the request, and then click on Documents.
Status changed to "Loan Docs Accepted"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. Loan documents have been received and accepted. You may schedule the work in accordance with program guidelines. If the customer has multiple loans, please be sure loan documents are also completed for those files. Please have the installation completed and all final documentation returned to EFS at least 10 business days prior to the expiration date of the loan.
Payment Type field on Disbursement changes to "Advance Payment"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. An Advance Payment has been made to you. Please login to the EFS website and navigate to the loan for more details. Thank you for working with Energy Finance Solutions!
Approval Expiration	Approval Expiration – Contractor	The Slipstream Energy Finance Solutions (EFS) loan approval for your customer, ((Insert Primary Borrower Full Name)), is about to expire. Please login to the portal to view the items needed and upload any required documents designated to be provided by the contractor.
Advance Pay 120 days	Status Change for EFS Loan Application	You received an advance payment of loan proceeds on <insert advance payment date here> for <insert primary borrower name>. This project must be completed within 180 days of receiving payment or the money must be returned unless an

		<p>extension has been approved. This is a reminder that you must submit the completion for this project by <insert advance payment date +180 here>, but no later than 2 business days prior to the loan expiration date. If you would like to request an extension, please submit an email to extensions@slipstreaminc.org with a detailed explanation and the date you expect to be able to submit all the completion documentation.</p> <p>If the approval expiration date precedes the advance payment expiration date, the project must be completed at least 2 business days prior to the approval expiration date. The approval expiration date for this loan is <insert approval expiration date here>.</p>
Advance Pay 150 days	Status Change for EFS Loan Application	<p>You received an advance payment of loan proceeds on <insert advance payment date here> for <insert primary borrower name>. This project must be completed within 180 days of receiving payment or the money must be returned unless an extension has been received and approved. This is a reminder that you must submit the completion for this project by <insert advance payment date +180 here>. If you would like to request an extension, please submit an email to extensions@slipstreaminc.org with a detailed explanation and the date you expect to be able to submit all the completion documentation.</p> <p>If the approval expiration date precedes the advance payment expiration date, the project must be completed by the approval expiration date. The approval expiration date for this loan is <insert approval expiration date here>.</p>
Contractor Completion	60 Days since Project Installation	In order to close the loan for <<insert primary borrower name>> the installation must be completed, and the completion paperwork must be received and accepted by Slipstream Energy Finance Solutions (EFS) at least two business days prior to the loan expiration date. Please upload the documentation through the contractor portal as soon as possible to avoid payment delays for this loan.
Loan status changed to "Withdrawn"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. The loan application has been withdrawn. This change may have occurred per customer request or may indicate that the loan application has expired. For more information, please call or email the assigned loan specialist.
Loan status changed to "Declined"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. Slipstream Energy Finance Solutions was unable to approve the loan request. For more information, please call or email the assigned loan specialist.
Loan status changed to "Paid"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer has changed. The loan amount, as indicated in the documents, has been paid in full to you. Please login to the Slipstream Energy Finance Solutions website and navigate to the loan for more details. Thank you for working with Slipstream Energy Finance Solutions!
Status change to "Subsidy Qualified"	Status Change for Slipstream Energy Finance Solutions Application - [Customer Last Name] - [Loan Number]	The status of the subsidy application for your customer [CUSTOMER FIRST AND LAST NAME], has changed to [Subsidy Status]. Please login to the Slipstream portal to see if any additional information is required.

A. References

The entire high-level process map is here for reference



F. Revision History

Revision	Effective Date
1.0	4.27.2022
2.0	7.5.2022
3.0	7.28.2022
4.0	11.28.2022
5.0	6.22.2023
6.0	7.25.2023
7.0	9.12.2023
8.0	10.30.2023