

How to Work with SystemVision™ for Existing Homes as a Loan Pool Member

1. Organization becomes member of NCHFA's Loan Pool Program
2. Member chooses to participate in SystemVision™ for Existing Homes and enters into 3 party Agreement
3. Member works with Advanced Energy to identify the Member's process and capacity for conducting a SystemVision™ for Existing Homes Program Energy Retrofit Audit, including but not limited to:
 - a. Having Member's staff trained by Advanced Energy
 - b. Member's staff may become BPI certified
 - c. Member may identify and contract with another Program-certified contractor to conduct Audit and establish Scope of Work
4. Member identifies property that could meet SystemVision™ for Existing Homes program standards
5. Member, or Program-certified contractor conducts Energy Retrofit Audit and establishes Scope of Work and submits to Advanced Energy for review.
6. Advanced Energy reviews Energy Retrofit Audit and Scope of Work. Once the audit and scope of work are approved or if revisions are needed, Advanced Energy will communicate with Member.
7. Once approved, the Member or Program-certified contractor perform the energy retrofit to meet SystemVision™ for Existing Homes program standards.

Wherever possible, work should be performed in compliance with Department of Energy Single Family Work Specifications (see Standard Work Specifications at <https://sws.nrel.gov/>).

8. Member will certify that all work in Scope of Work has been completed.
9. Advanced Energy (or AE's contractor) will conduct performance testing on house, verify that the scope of work was completed, and certify that the house meets SystemVision™ for Existing Homes standards.
10. Advanced Energy will certify the house as meeting SystemVision™ for Existing Homes, as well as, certify the home for participating in the Home Performance with ENERGY STAR program through the Department of Energy.
11. Advanced Energy invoices the Member, and the Member makes payment for certification.
12. Prior to the Agency disbursing the SystemVision fee, the Member will help the Borrower to enroll online to have energy usage data sent to the SystemVision™ for Existing Homes database. If not an option, Member and Advanced Energy will coordinate to utilize alternative data collection method.
13. Member will requisition the SystemVision fee from the Agency.
14. Upon completion of SystemVision™ for Existing Homes certification and receipt of any other appropriate recorded loan documents after closing, the Agency will disburse funds to the Member.