

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 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.

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. Affiliate 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 and verify that house meets SystemVision™ for Existing Homes standards.
10. Member and Advanced Energy will coordinate to utilize designated data collection method. The Member will help the Borrower to enroll online to have energy information sent to the SystemVision™ for Existing Homes database.
11. Advanced Energy will certify house as meeting SystemVision™ for Existing Homes and report the certification to Department of Energy for participating in the Home Performance with ENERGY STAR program.
12. Member will requisition funds from the Agency.
13. Upon completion of SystemVision™ for Existing Homes certification and receipt of any other appropriate loan documents the Agency will disburse funds to the Member.