Program Workflow

KY HOME PERFORMANCE℠

STAGES OF THE JOB	PAPERWORK/SOFTWARE TASKS
Audit Completed	▪ SOFTWARE: Evaluation data entered into Surveyor (SR) and uploaded into Compass (CS). Look for: does "Installation Rebate" field show a 20% rebate? Does status read "Evaluation Submitted"? ▪ SOFTWARE: "Evaluation Approved" by CSG (look for updated status on dashboard) ▪ DOCUMENTS: Customer/Evaluator submits audit completion form to AFC First, OR uploads scanned copy to CS (quick and convenient).
Contract Signed with Approved Installer Or Certified Evaluator/Contractor	▪ DOCUMENTS: KHP contractor submits specification sheet and signed contract/ estimate for work to AFC First, OR uploads scanned copies to CS.
Work Begins	▪ REBATE RECEIVABLE: AFC First issues pre-approval OR ▪ LOAN RECEIVABLE: Loan documents emailed to contractor
Job Completed	▪ REBATE DOCUMENTS: Customer pays for work in full and submits (or scans/uploads) completion certificate and paid invoice ▪ LOAN DOCUMENTS: Mailed to AFC First (no scan option) ▪ SOFTWARE: Re-open job in CS "completed job" and update file in SR based on completed work. See that SR matches the actual invoice, and that the installation rebate field includes the correct amount. Upload changes to CS, "submit" in CS. Look for "job submitted" status, and later "job approved" to see that job has passed QA.
QA Completed	▪ AFC First obtains verbal confirmation from customer that work was done to customer's satisfaction ▪ Rebate: Customer mailed rebate check directly ▪ Loan: AFC First pays Approved Installer loan proceeds