

Energy Provider Portal – State Information Support User

Created: 11/22/2021

Last Updated: 6/10/2022

Energy Provider Portal Overview

The Energy Provider Portal is part of the North Carolina Families Accessing Services through Technology (NC FAST) program. The Energy Provider Portal is built upon the Salesforce platform and exists to simplify the approval and invoicing process for both Utility Providers and county officials when providing assistance to low-income households.

Note: Help desk users should refer to the Utility Provider User training material to understand the functionality of the Energy Provider Portal from the utility provider’s perspective. Help desk users will not be able to edit any fields or objects within the Energy Provider Portal as their access is read-only.

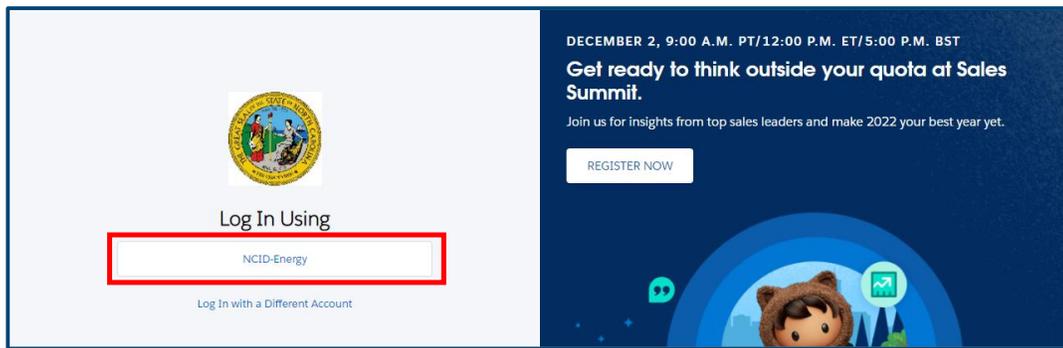
Step-by-Step Instructions

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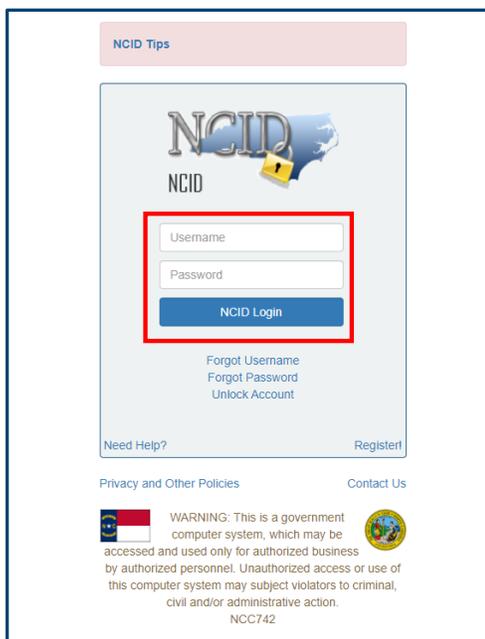
1. Logging In to the Energy Provider Portal

In order to conduct activities within the Energy Provider Portal, you must be invited by an administrator first, and must have an existing North Carolina Identity Management Service (NCID).

1. Navigate to the Energy Provider Portal URL at <https://ncdhhsncfast.lightning.force.com>.
2. Select the **NCID-Energy** login option.



3. Enter your NCID username and password and select NCID Login.



2. Navigating the Energy Provider Portal

Upon logging in to the Energy Provider Portal, State Information Support users will be taken to the **HOME** tab. From here, you will be able to quickly navigate to provider information as well as view specific records that require your attention.



1. The first thing you will see upon logging in to the Energy Provider Portal is the Home tab. This tab can be accessed at any time by clicking on **HOME** on the Navigation Bar.
2. The Home tab's default display will show multiple different tiles:
 - a. **Provider Enrollment - Submitted:** This tile displays a list of any utility provider who has submitted an enrollment application that has not yet been approved or rejected.
 - b. **Vendor Agreement - Submitted:** This tile displays provider contracts (also known as vendor agreements) that need to be activated by the county for enrolled utility providers. The contract number, the provider account it is associated to, the county, and the current status of the contract will be visible in this table.

Created Date ↑	Account Name	Primary Category	Primary Contact
1 9/29/2021, 10:50 AM	Cameron White	Water / Wastewater Vendor	Apex Contact
2 10/4/2021, 5:57 PM	Provider Enrollment - Submitted		
3 10/8/2021, 3:45 AM	test DHHS Energy Provider	Water / Wastewater Vendor	test DHHS Energy Provider
4 10/8/2021, 1:27 PM	HutchTest	Cooling	Nick-test Hutchinson
5 10/10/2021, 5:33 PM	ApexWake	Water / Wastewater Vendor	ApexWake Energy
6 10/14/2021, 7:20 PM	Jared Brand New Test	Water / Wastewater Vendor	Jared Alwyn
7 10/15/2021, 9:32 AM	DukeEnergy	Water / Wastewater Vendor	DukeEnergy Praveen
8 10/18/2021, 10:56 AM	accenture	Heating	JayaProvider newOne
9 10/20/2021, 10:29 AM	Cameron Water	Water / Wastewater Vendor	Cameron White

Vendor Agreement - Submitted

PC-0025
Account Name: HutchTest
County: GI
Contract Status: Submitted

PC-0026
Account Name: HutchTest
County: GI
Contract Status: Submitted

PC-0027
Account Name: HutchTest

3. The next tab on the navigation bar is the **ACCOUNTS** tab. The Accounts tab is how you navigate to an Account Record for a specific utility provider. The Account Record contains all the information a utility provider enters when submitting their enrollment application.

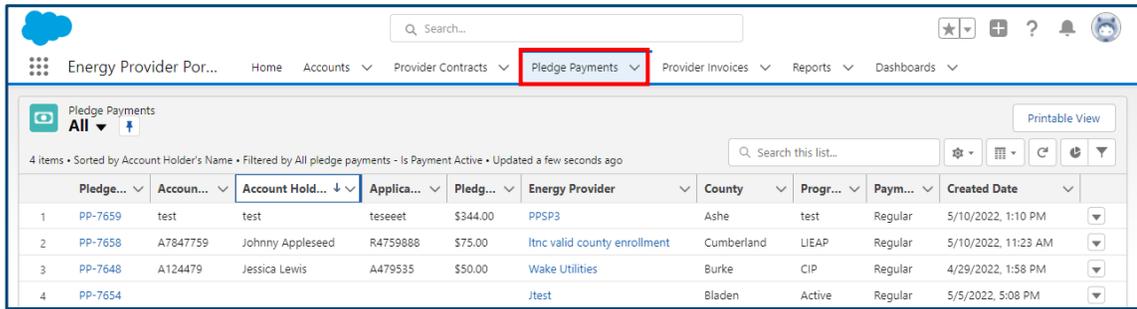


	Account Name ↑	Provider ...	Primary Category	Provide...	Primary Contact	Last ...	Last Modified Date
1	AApraveenkk	Ashe	Heating / Cooling Vendor	Submitted	Praveenc test	80tes	5/6/2022, 12:24 PM
2	AApraveenProviderTODAY	Cleveland	Heating / Cooling Vendor	Open	praveen test	112te	4/29/2022, 11:53 A...
3	AAtestpkpk	Brunswick	Water / Wastewater Vendor	Enrolled	praveenS test	pkona	5/6/2022, 11:33 AM
4	AAtestpkpk	Hoke	Water / Wastewater Vendor	Enrolled	praveenS test	pkona	5/6/2022, 11:33 AM
5	ABC Utilities	Alamance	Water / Wastewater Vendor	Submitted	Lacey Crews	76Cre	3/31/2022, 2:15 PM
6	ABC Utilities	Alexander	Water / Wastewater Vendor	Open	Lacey Crews	76Cre	3/31/2022, 2:11 PM
7	ABC Utilities	Alamance	Heating / Cooling Vendor	Submitted	Lacey Crews	76Cre	3/31/2022, 2:17 PM
8	ABC Utilities	Alexander	Heating / Cooling Vendor	Open	Lacey Crews	76Cre	3/31/2022, 2:19 PM
9	ABCD Utilities	Alamance	Water / Wastewater Vendor	Submitted	Lacey Crews	76Cre	3/31/2022, 3:22 PM
10	ABCD Utilities	Alexander	Water / Wastewater Vendor	Open	Lacey Crews	76Cre	3/31/2022, 3:09 PM
11	ABCD Utilities	Alleghany	Water / Wastewater Vendor	Open	Lacey Crews	76Cre	3/31/2022, 3:09 PM
12	ABCD Utilities	Anson	Water / Wastewater Vendor	Open	Lacey Crews	76Cre	3/31/2022, 3:09 PM
13	Apex-Heating / Cooling Vendor	Alamance	Heating / Cooling Vendor	Enrolled	praveencc test	pkona	5/2/2022, 1:35 PM
14	Apex-Heating / Cooling Vendor	Anson	Heating / Cooling Vendor	Enrolled	praveencc test	pkona	5/2/2022, 1:39 PM

- The next tab on the navigation bar is the **PROVIDER CONTRACTS** tab. The Provider Contracts tab is where you can search for and view specific vendor agreements for enrolled utility providers. The Provider Contract record contains information about the specific utility being provided, as well as a start and end date of their vendor agreement.

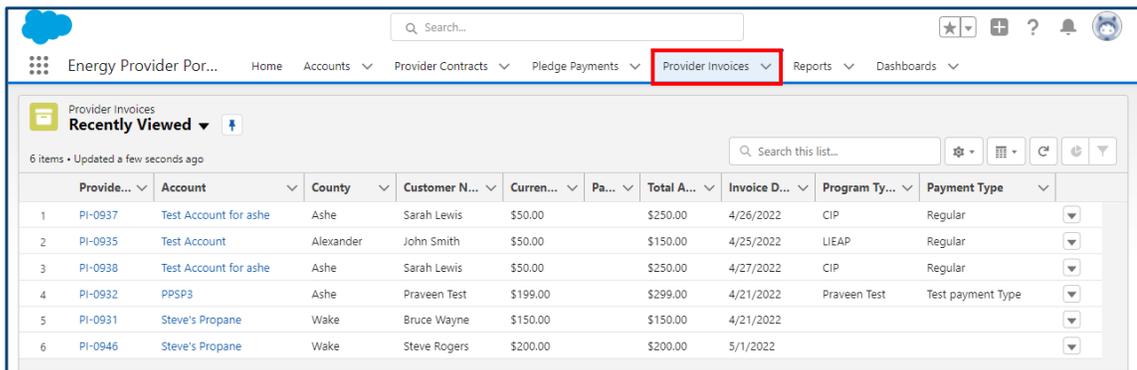
	Provider Contract	Account Name	Contract Status	Start Date	End Date
1	PC-0023	HutchTest	Active	10/12/2021	10/14/2021
2	PC-0025	HutchTest	Submitted	10/12/2021	10/14/2021
3	PC-0047	Jared Brand New Test	Submitted	10/14/2021	11/19/2021
4	PC-0045	Test Company	Submitted	10/15/2021	10/15/2022
5	PC-0042	Holly Springs Water	Submitted	10/15/2023	10/15/2024
6	PC-0028	test DHHS Energy Provider	Submitted	10/12/2021	10/14/2021
7	PC-0026	HutchTest	Submitted	10/12/2021	10/14/2021
8	PC-0004	Test Water Provider			
9	PC-0002	Apex Water - Wake County	Closed	9/29/2021	10/31/2022

- The next tab on the navigation bar is the **PLEDGE PAYMENTS** tab. The Pledge Payments tab contains records of each individual payment allocation (the one-time dollar amount of assistance that has been approved) to be paid to the utility provider on behalf of an individual resident. In addition, each pledge payment record links to any corresponding Provider Invoice.



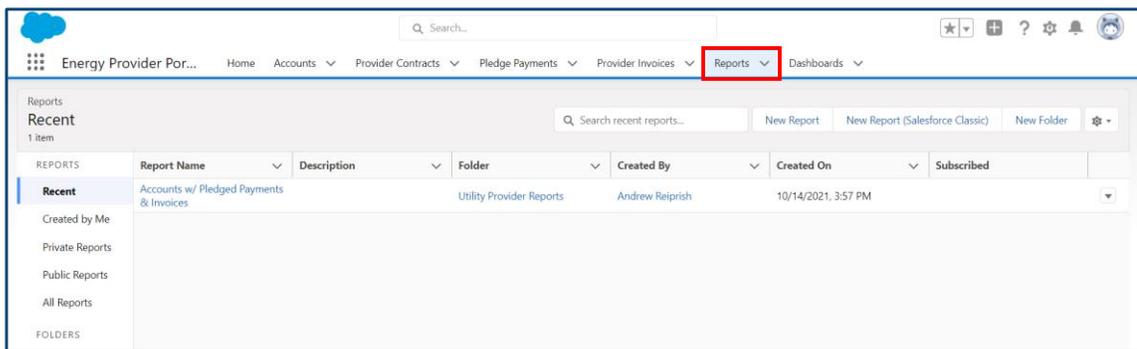
	Pledge...	Account...	Account Hold...	Applica...	Pledg...	Energy Provider	County	Progr...	Paym...	Created Date
1	PP-7659	test	test	teseet	\$344.00	PPSP3	Ashe	test	Regular	5/10/2022, 1:10 PM
2	PP-7658	A7847759	Johnny Appleseed	R4759888	\$75.00	ltnc valid county enrollment	Cumberland	LIEAP	Regular	5/10/2022, 11:23 AM
3	PP-7648	A124479	Jessica Lewis	A479535	\$50.00	Wake Utilities	Burke	CIP	Regular	4/29/2022, 1:58 PM
4	PP-7654					/Jtest	Bladen	Active	Regular	5/5/2022, 5:08 PM

6. The next tab on the navigation bar is the **PROVIDER INVOICES** tab. The Provider Invoices tab shows the dollar amount the county has pledged on individual's account.



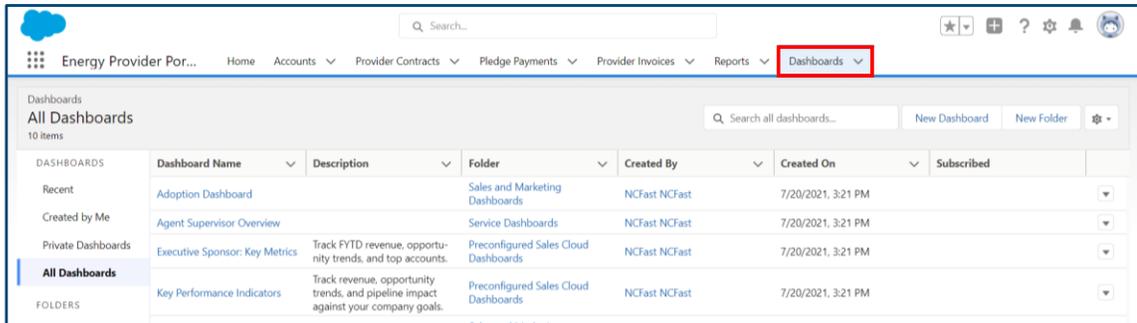
	Provide...	Account	County	Customer N...	Curren...	Pa...	Total A...	Invoice D...	Program Ty...	Payment Type
1	PI-0937	Test Account for ashe	Ashe	Sarah Lewis	\$50.00		\$250.00	4/26/2022	CIP	Regular
2	PI-0935	Test Account	Alexander	John Smith	\$50.00		\$150.00	4/25/2022	LIEAP	Regular
3	PI-0938	Test Account for ashe	Ashe	Sarah Lewis	\$50.00		\$250.00	4/27/2022	CIP	Regular
4	PI-0932	PPSP3	Ashe	Praveen Test	\$199.00		\$299.00	4/21/2022	Praveen Test	Test payment Type
5	PI-0931	Steve's Propane	Wake	Bruce Wayne	\$150.00		\$150.00	4/21/2022		
6	PI-0946	Steve's Propane	Wake	Steve Rogers	\$200.00		\$200.00	5/1/2022		

7. The next tab on the navigation bar is the **REPORTS** tab. The Reports tab contains pre-built lists of data displayed in rows and columns, which can be filtered, sorted, or exported into Microsoft Excel files.



REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Accounts w/ Pledged Payments & Invoices		Utility Provider Reports	Andrew Reiprish	10/14/2021, 3:57 PM	

8. The final tab on the navigation bar is the **DASHBOARDS** tab. On the Dashboards tab you can customize a visual depiction of the reports found on the Reports tab.



3. View & Approve Submitted Provider Enrollment Applications

After a utility provider submits an enrollment application and vendor agreement via the Energy Provider Portal, you will be able to review and approve both their enrollment application and vendor agreement. Doing so will allow the utility provider to begin invoicing the appropriate county on behalf of North Carolina residents who receive utility assistance. Every time a provider submits a new enrollment application, you will receive an automated email notification. First you will activate their submitted provider contract, and then you will be able to enroll their account.

Note: If for any reason a provider has created an account and it remains in **OPEN** status for 12 months without being submitted, the account will automatically close.

1. Log in to the Energy Provider Portal using your NCID, which opens on the **HOME TAB**.
2. At the top of the screen, you will see a tile labeled **PROVIDER ENROLLMENT – SUBMITTED**, which displays a list of all providers with an enrollment application that has not yet been approved.
3. Click the provider account you wish to review and enroll/reject.



The screenshot shows the 'Accounts - Provider Enrollment - Submitted' page. A table lists 10 submitted accounts. The second row is highlighted with a red box. The details panel on the right shows information for two provider contracts: PC-0384 and PC-0386.

Account No...	Provi...	Primary Category	Provi...	Created Date	Primary Co...
1	AApraveenkk	Ashe Heating / Cooling Vendor	Submitted	5/6/2022, 12:24 PM	Praveenc test
2	Heating R Us	Wake Water / Wastewater Vendor	Submitted	5/4/2022, 2:34 PM	Steve DiGiorno
3	Heating R Us	Wake Heating / Cooling Vendor	Submitted	5/4/2022, 2:34 PM	Steve DiGiorno
4	Heating R Us	Durham Heating / Cooling Vendor	Submitted	5/4/2022, 2:34 PM	Steve DiGiorno
5	Multi-Test	Alamance Heating / Cooling Vendor	Submitted	5/3/2022, 2:26 PM	Steve Deegangee
6	Multi-Test	Alexander Heating / Cooling Vendor	Submitted	5/3/2022, 2:26 PM	Steve Deegangee
7	Multi-Test	Alleghany Heating / Cooling Vendor	Submitted	5/3/2022, 2:26 PM	Steve Deegangee
8	Steves Electric	Alleghany Heating / Cooling Vendor	Submitted	5/2/2022, 1:48 PM	Steve DiGangi
9	Steves Electric	Ashe Heating / Cooling Vendor	Submitted	5/2/2022, 1:48 PM	Steve DiGangi
10	Praveen Services	Alexander Heating / Cooling Vendor	Submitted	4/26/2022, 3:58 PM	PraveenB test

4. Verify that each field in the **DETAILS** tab is filled in correctly, with accurate information:
 - a. **Account Name:** The name of the utility provider.

Note: If the account name includes the county (e.g., Steve’s Utilities – WAKE), you must remove the county name before enrolling the account.
 - b. **Enrollment Start Date:** The date the utility provider submitted their enrollment for approval.
 - c. **Enrollment End Date:** This field should be blank for all submitted enrollment applications.
 - d. **Primary Category:** Indicates which category of utility this provider delivers.

Note: The primary category “LTNC Heating/Cooling” can only be selected for the following counties: Cumberland, Hoke, Robeson, Scotland. Built-in validations will ensure that providers can only select the appropriate counties when the primary category is “LTNC Heating/Cooling.”
 - e. **Primary Fuel Type:** This field indicates the fuel type used by heating and cooling providers.

Note: This field will only have a value if a provider’s primary category is “Heating/Cooling” or “LTNC Heating/Cooling”.
 - f. **FEIN or SSN:** Federal Employer Identification Number or Social Security Number, which acts as a unique identifier for each provider. Only one of these two fields will be filled in.



- g. **Provider Access Code:** This code is unique to the provider account and is used to give access to the Energy Provider Portal to additional provider users.
- h. **Provider County:** The county where the utility provider delivers service.
- i. **Approved Non-Federal CIP Fund:** This picklist field is used to indicate accounts that utilize Non-Federal CIP funds and identify the specific fund(s) approved.

Notes: There are several important factors to keep in mind with regards to this field.

- State Information Support users should update this field when enrolling a new provider's account, but may edit this field at any time.
 - State Information Support users will be informed by the business team at NC DSS if this field needs to be updated for any providers.
 - Providers loaded into the Energy Provider Portal by NCDHHS will have this information already annotated.
 - Providers are not able to self-identify as an approved non-federal CIP fund account.
 - Provider accounts may only select one Non-Federal CIP fund, but may not select either the "Share the Light" or "NC Rate Settlement" Non-Federal CIP funds.
 - Duke Energy accounts may select any one Non-Federal CIP fund, or they may select two Non-Federal CIP funds if the two selected are "Share the Light" and "NC Rate Settlement."
- j. **Primary Contact:** The primary point of contact at the utility provider.
Note: If the primary contact field is blank, do not update the **PROVIDER STATUS** field to **ENROLLED**.
 - k. **Email Address:** The email address at which the utility provider contact can be reached.
Note: If the email address field is blank, do not update the **PROVIDER STATUS** field to **ENROLLED**.
 - l. **Website:** The utility provider's website (optional).
 - m. **Phone:** The primary phone number for the utility provider to be reached.
 - n. **Provider Status:** Current status of the utility provider's enrollment. This should initially appear as **SUBMITTED**.



Notes: There are several things to keep in mind regarding the **PROVIDER STATUS** field.

- You **WILL NOT** be able to update this field to **ENROLLED** until you have activated at least one provider contract.
 - If a provider's account is rejected or closed, they will have the opportunity to make corrections and re-submit the account for enrollment without having to create a new one.
- o. **Reason for Rejection:** If an enrollment application is rejected, this becomes a required field for you to enter, which is used to indicate why a provider's enrollment application was rejected by the county. This should appear as blank on an initial enrollment application.
- p. **Reason for Suspension:** Similarly, if an account is suspended, this become an optional field which is used to indicate why a provider's account has been suspended. This should appear as blank on an initial enrollment application.
- q. **Billing Address:** The address of the utility provider.
- r. **System Information:** The information in this section of the account is used for integration into NC FAST and does not need to be reviewed or edited.

Account: Heating R Us

Provider County: Wake | Primary Category: Water / Wastewater Vendor | Provider Status: Submitted

Related: **Details**

Account Name	Heating R Us	Primary Contact	Steve DiGiorno
Enrollment Start Date	5/4/2022	Email Address	stevend@mailinator.com
Enrollment End Date		Website	https://www.heating.com
Primary Category	Water / Wastewater Vendor	Phone	(111) 222-3333
Primary Fuel Type			
FEIN	919191919		
SSN			
Provider Access Code	13710868		
Provider County	Wake		
Approved Non-Federal CIP Fund			

Account Summary

Provider Status	Submitted
Reason For Rejection	
Reason For Suspension	

5. On the **RELATED** tab, confirm that the utility provider has submitted a vendor agreement by locating at least one submitted **PROVIDER CONTRACT** record.



Account: Heating R Us

Provider County: Wake | Primary Category: Water / Wastewater Vendor | Provider Status: Submitted

Related Details

Provider Contracts (1)

Provider Contract	Vendor Agreement Type	Contract Status	Start Date
PC-0500	Water/Waste Water Service ...	Submitted	5/19/2022

View All

Related Contacts (1) Add Relationship

Steve DiGiorno
Email: stevend@mailinator.com
Phone:

View All

Pledge Payments (0)

Provider Invoices (0)

6. If the utility provider's enrollment information is correct and they have a submitted provider contract, your next step will be to activate the submitted Provider Contract **BEFORE** approving the provider's enrollment application. If you attempt to enroll a provider's account prior to activating at least one of their provider contracts, you will receive an error message. If the provider's enrollment information is not filled in correctly, or they do not have at least one submitted provider contract, skip to step 14.
7. Click on the **PROVIDER CONTRACT**, and verify that each field is filled in correctly with accurate information:
 - a. **Provider Contract:** The system-generated record number for the Provider Contract.
 - b. **Account Name:** The name of the utility provider.
 - c. **Utility Service Provided:** The utility service program specific to this contract.



- d. **Vendor Agreement Type:** Category of utility for this contract.
- e. **County:** The county where the utility provider distributes services.
- f. **Address:** The address of the provider.
- g. **Phone Number:** The phone number of the provider.
- h. **FEIN or SSN:** The unique identifier for the provider.
- i. **Start Date:** The beginning of the utility provider's agreement with the county. This date may be up to 30 days in the past from when the provider submitted the vendor agreement.
- j. **End Date:** The final date of the utility provider's agreement with the county.
Note: The end date of the contract will be 12 months from the entered start date.
- k. **Contract Status:** Current standing of the utility provider's agreement with the county. This field should show as **SUBMITTED**.

The screenshot shows the 'Provider Contract' page for PC-0500. The contract status is 'Submitted'. The details section is highlighted with a red box and contains the following information:

Provider Contract	PC-0500	Start Date	5/19/2022
Account Name	Heating R Us	End Date	5/18/2023
Utility Service Provided	LIHWAP	Contract Status	Submitted
Vendor Agreement Type	Water/Waste Water Service Agreement		
County	Wake		

Additional details shown below the red box include:

- Mailing Address: 123 Main St, Raleigh, NC, 12345
- Mailing City: Raleigh
- Mailing Zip Code: 12345
- Phone Number: 1112223333
- FEIN: 919191919
- SSN: [Redacted]
- Created By: Steve DiGiorno, 5/4/2022, 2:50 PM
- Last Modified By: Steve DiGiorno, 5/4/2022, 2:50 PM
- Reference Number: [Redacted]

- 8. Click the **ACTIVATE** button in the top right of the screen.

Note: If the provider has submitted multiple contracts, verify and activate each one.



Energy Provider Por... Home Accounts ▾ Provider Contracts ▾ Pledge Payments ▾ Provider Invoices ▾ Reports ▾ Dashboards ▾

Provider Contract
PC-0500 Edit **Activate**

Account Name	Start Date	End Date	Contract Status
Heating R Us	5/19/2022	5/18/2023	Active

Details

Provider Contract	PC-0500	Start Date	5/19/2022
Account Name	Heating R Us	End Date	5/18/2023
Utility Service Provided	LIHWAP	Contract Status	Active
Vendor Agreement Type	Water/Waste Water Service Agreement		
County	Wake		
Mailing Address	123 Main St Raleigh NC, 12345		
Mailing City	Raleigh		
Mailing Zip Code	12345		
Phone Number	1112223333		
FEIN	919191919		
SSN			
Created By	Steve DiGiorno, 5/4/2022, 2:50 PM	Last Modified By	Steven DiGangi, 5/10/2022, 5:07 PM
Reference Number			

9. Navigate back to the provider's account by clicking on the **ACCOUNT NAME** hyperlink.
10. Select the **EDIT** button on the top right corner of the screen, or select the pencil icon next to the **PROVIDER STATUS** field on the **DETAILS** tab.
11. Select **ENROLLED** from the drop-down menu.

Note: Whenever you are updating the Provider Status, you should only select **ENROLLED**, **REJECTED**, **SUSPENDED**, or **CLOSED** as necessary. You should not update a provider's status to any of the other available options, nor should you change an already **ENROLLED** provider back to **SUBMITTED** status.



The screenshot shows the 'Account Heating R Us' page in the NC FAST system. The 'Provider Status' dropdown menu is highlighted in yellow and has a red box around it, showing 'Enrolled'. The 'Save' button at the bottom right is also highlighted with a red box. Other fields include 'Provider County: Wake', 'Primary Category: Water / Wastewater Vendor', and 'Provider Status: Submitted'.

12. Click **SAVE**.
13. The provider is now enrolled and has an active contract. Additionally, the provider will receive an automated email informing them that the account has been enrolled. Skip steps 14-16.
14. If the provider's information in their enrollment application is incorrect, incomplete, or they do not have a submitted vendor agreement (Provider Contract), then select the pencil icon to the right of the **PROVIDER STATUS** field and select **REJECTED**.
15. Explain why you are rejecting the provider's enrollment in the **REASON FOR REJECTION** field. This is a required field for any provider whose **PROVIDER STATUS** is **REJECTED**.
16. Click **SAVE**.

4. View & Activate Submitted Provider Contracts

Providers who are already enrolled may submit a new contract (vendor agreement) when their existing contract is set to expire soon. These new contracts will not be automatically renewed and will require activation. Every time a provider submits a new contract for activation, you will receive an automated email notification.



1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME TAB**.
2. On the right side of the Home tab, locate the tile labeled **VENDOR AGREEMENT – SUBMITTED** which will display a list of every contract that is awaiting activation.
3. Click on the provider contract record you wish to review and activate.

The screenshot shows the Energy Provider Portal Home page. The main content area is titled "Accounts" and "Provider Enrollment - Submitted". It displays a table with 9 items, sorted by Created Date. The table has columns for Created Date, Account Name, Primary Category, and Primary Contact. A red box highlights a tile on the right side of the page labeled "Vendor Agreement - Submitted".

Created Date	Account Name	Primary Category	Primary Contact
9/29/2021, 10:50 AM	Cameron White	Water / Wastewater Vendor	Apex Contact
10/4/2021, 5:57 PM	Provider Enrollment - Submitted		
10/8/2021, 3:45 AM	test DHHS Energy Provider	Water / Wastewater Vendor	test DHHS Energy Provider
10/8/2021, 1:27 PM	HutchTest	Cooling	Nick-test Hutchinson
10/10/2021, 5:33 PM	ApexWake	Water / Wastewater Vendor	ApexWake Energy
10/14/2021, 7:20 PM	Jared Brand New Test	Water / Wastewater Vendor	Jared Alwyn
10/15/2021, 9:32 AM	DukeEnergy	Water / Wastewater Vendor	DukeEnergy Praveen
10/18/2021, 10:56 AM	accenture	Heating	JayaProvider newOne
10/20/2021, 10:29 AM	Cameron Water	Water / Wastewater Vendor	Cameron White

4. Review the **DETAILS** and verify that each field is filled in correctly with accurate information.

Note: Providers can submit a vendor agreement with a start date up to 30 days in the past from the date they submit the vendor agreement.

The screenshot shows the Energy Provider Portal details page for a Provider Contract. The contract ID is PC-0045. The account name is Test Company. The start date is 10/15/2021 and the end date is 10/15/2022. The contract status is Submitted. A red box highlights the "Details" section, which contains the following information:

Field	Value
Provider Contract	PC-0045
Account Name	Test Company
Utility Service Provided	LIHWAP
Vendor Agreement Type	Water/Waste Water Service Agreement
County	Anson
Start Date	10/15/2021
End Date	10/15/2022
Contract Status	Submitted

Additional information shown includes the mailing address (123 main st, Test, NC, 24566), mailing city (Test), mailing zip code (24566), phone number (455-344-3456), FEIN (888229889), and SSN. The contract was created by Samia Yosef on 10/15/2021 at 11:06 AM and last modified by Samia Yosef on 10/15/2021 at 11:06 AM.

5. Click the **ACTIVATE** button on the top right of the screen to activate the contract.



The screenshot shows the 'Energy Provider Portals' interface. At the top, there is a search bar and navigation tabs: Home, Accounts, Provider Contracts (selected), Pledge Payments, Provider Invoices, Reports, and Dashboards. Below the navigation, the 'Provider Contract' details for 'PC-0045' are displayed. The contract status is 'Submitted'. A red box highlights the 'Activate' button in the top right corner. Below the main contract summary, there is a 'Details' section with a table of contract information.

Account Name	Start Date	End Date	Contract Status
Test Company	10/15/2021	10/15/2022	Submitted

Details	
Provider Contract	PC-0045
Account Name	Test Company
Utility Service Provided	LHWAP
Vendor Agreement Type	Water/Waste Water Service Agreement
County	Anson
Mailing Address	123 main st Test NC, 24566
Mailing City	Test
Mailing Zip Code	24566
Phone Number	455-344-3456
FEIN	888229889
SSN	
Created By	Samia Yosef, 10/15/2021, 11:06 AM
Last Modified By	Samia Yosef, 10/15/2021, 11:06 AM

6. Click **FINISH** in the pop-up window that appears.
7. Verify that the Contract Status now reads as **ACTIVE**.

This screenshot shows the same 'Provider Contract' details for 'PC-0045'. The contract status has been updated to 'Active'. A red box highlights the 'Contract Status' field in the summary table. The 'Details' section below also shows the updated status. The 'Last Modified By' field now shows 'Steven DiGangi, 10/25/2021, 11:13 AM'.

Account Name	Start Date	End Date	Contract Status
Test Company	10/15/2021	10/15/2022	Active

Details	
Provider Contract	PC-0045
Account Name	Test Company
Utility Service Provided	LHWAP
Vendor Agreement Type	Water/Waste Water Service Agreement
County	Anson
Mailing Address	123 main st Test NC, 24566
Mailing City	Test
Mailing Zip Code	24566
Phone Number	455-344-3456
FEIN	888229889
SSN	
Created By	Samia Yosef, 10/15/2021, 11:06 AM
Last Modified By	Steven DiGangi, 10/25/2021, 11:13 AM

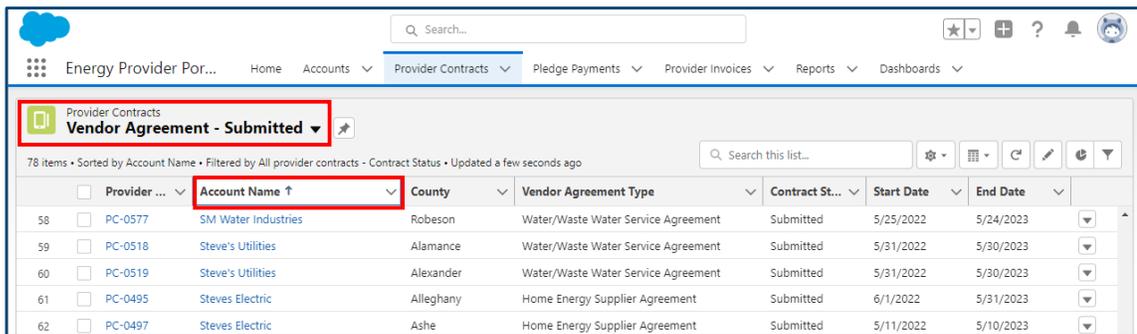
8. Provider contracts are all defaulted to end 12 months from the start date. At the end of the contract, the contract status will automatically update to **EXPIRED** status. If the contract has been in **EXPIRED** status for 12 months, the **PROVIDER STATUS** will automatically update to **CLOSED** and the provider will need to resubmit an enrollment application for their account.

Note: Providers will not be visible in the Energy applications within NC FAST until they have an active contract within the Energy Provider Portal.

5. Activate Multiple Contracts & Enroll Multiple Accounts Simultaneously

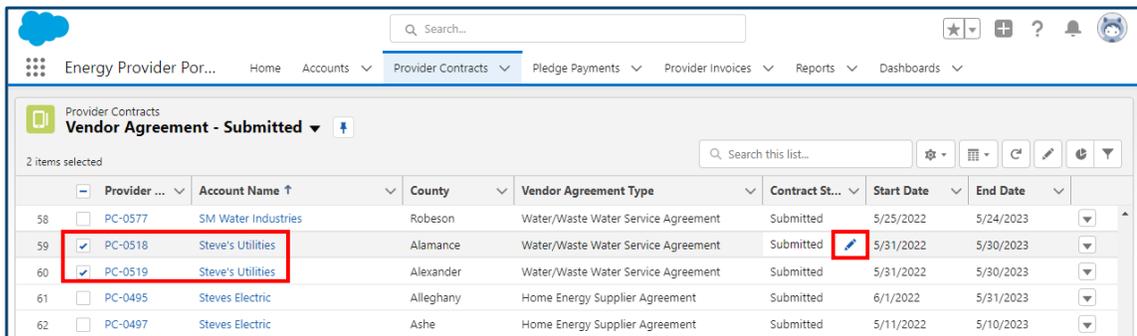
In the event that a provider submits several vendor agreements and provider accounts at the same time, you may wish to save time by activating multiple contracts and enrolling multiple accounts at once. It is still recommended to review the details of an account before enrolling, however this option exists to save time and increase efficiency.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME TAB**.
2. Navigate to the **PROVIDER CONTRACTS** tab and filter to the **VENDOR AGREEMENT – SUBMITTED** list view.
3. Use the **SORT** function on the **ACCOUNT NAME** column to locate the provider accounts whose contracts you want to activate.



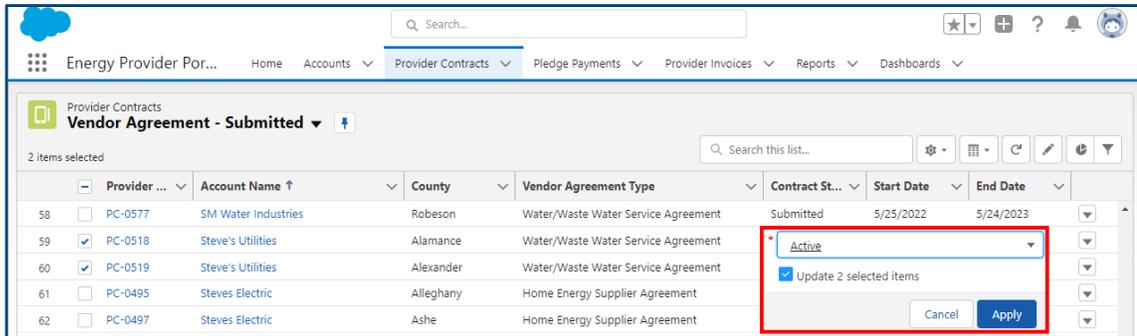
Provider ...	Account Name ↑	County	Vendor Agreement Type	Contract St...	Start Date	End Date
58	PC-0577 SM Water Industries	Robeson	Water/Waste Water Service Agreement	Submitted	5/25/2022	5/24/2023
59	PC-0518 Steve's Utilities	Alamance	Water/Waste Water Service Agreement	Submitted	5/31/2022	5/30/2023
60	PC-0519 Steve's Utilities	Alexander	Water/Waste Water Service Agreement	Submitted	5/31/2022	5/30/2023
61	PC-0495 Steves Electric	Alleghany	Home Energy Supplier Agreement	Submitted	6/1/2022	5/31/2023
62	PC-0497 Steves Electric	Ashe	Home Energy Supplier Agreement	Submitted	5/11/2022	5/10/2023

4. Select the checkbox next to each contract you intend to activate, then select the **PENCIL** icon in the **CONTRACT STATUS** column.



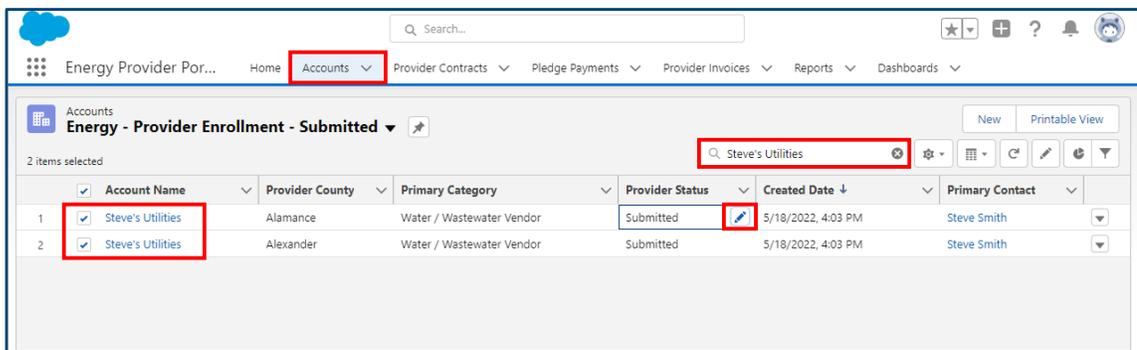
Provider ...	Account Name ↑	County	Vendor Agreement Type	Contract St...	Start Date	End Date
58	PC-0577 SM Water Industries	Robeson	Water/Waste Water Service Agreement	Submitted	5/25/2022	5/24/2023
59	PC-0518 Steve's Utilities	Alamance	Water/Waste Water Service Agreement	Submitted	5/31/2022	5/30/2023
60	<input checked="" type="checkbox"/> PC-0519 Steve's Utilities	Alexander	Water/Waste Water Service Agreement	Submitted 	5/31/2022	5/30/2023
61	PC-0495 Steves Electric	Alleghany	Home Energy Supplier Agreement	Submitted	6/1/2022	5/31/2023
62	PC-0497 Steves Electric	Ashe	Home Energy Supplier Agreement	Submitted	5/11/2022	5/10/2023

5. From the drop-down menu, select **ACTIVE**, then check the **UPDATE (ALL) SELECTED ITEMS**. Click **APPLY**.



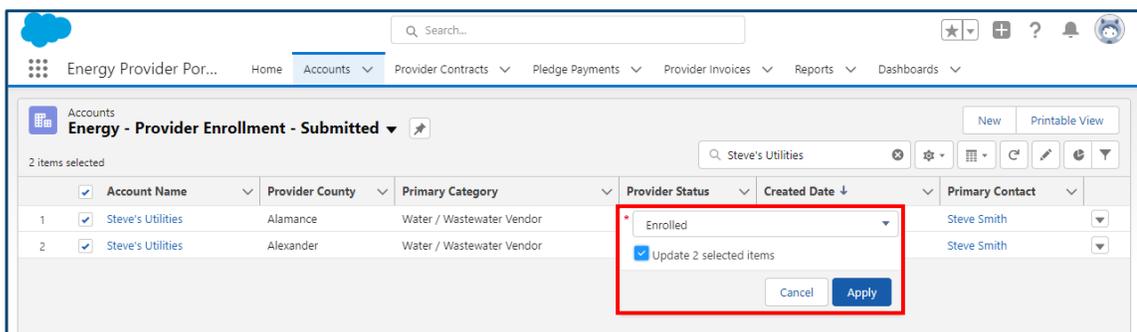
Provider ...	Account Name ↑	County	Vendor Agreement Type	Contract St...	Start Date	End Date
58	PC-0577 SM Water Industries	Robeson	Water/Waste Water Service Agreement	Submitted	5/25/2022	5/24/2023
59	<input checked="" type="checkbox"/> PC-0518 Steve's Utilities	Alamance	Water/Waste Water Service Agreement	Active		
60	<input checked="" type="checkbox"/> PC-0519 Steve's Utilities	Alexander	Water/Waste Water Service Agreement			
61	PC-0495 Steves Electric	Alleghany	Home Energy Supplier Agreement			
62	PC-0497 Steves Electric	Ashe	Home Energy Supplier Agreement			

6. Confirm that the changes highlighted in yellow are correct, then click **SAVE**.
7. The screen will refresh and a green banner will appear at the top of the screen, letting you know that the contracts for the provider's accounts are now active and the provider may now be enrolled. Navigate to the **ACCOUNTS** tab.
8. Select the **PROVIDER ENROLLMENT – SUBMITTED** list view and search for the provider accounts to enroll using the search bar.
9. Select the checkbox next to each account you intend to enroll, then select the **PENCIL** icon in the **PROVIDER STATUS** column.



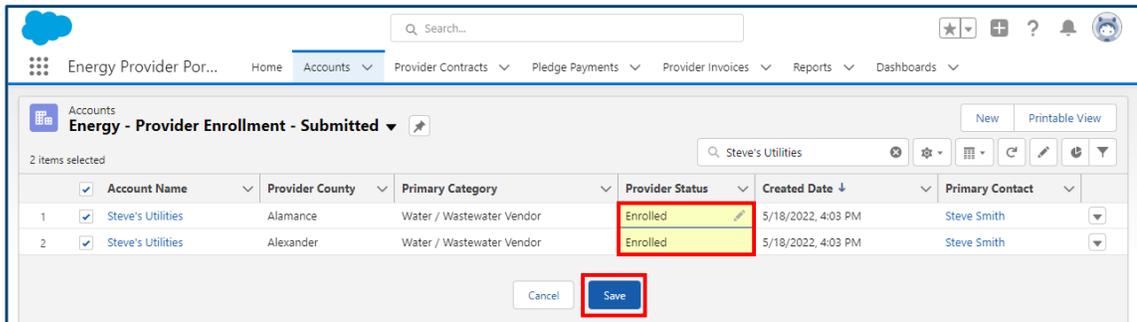
Account Name	Provider County	Primary Category	Provider Status	Created Date ↓	Primary Contact
<input checked="" type="checkbox"/> Steve's Utilities	Alamance	Water / Wastewater Vendor	Submitted 	5/18/2022, 4:03 PM	Steve Smith
<input checked="" type="checkbox"/> Steve's Utilities	Alexander	Water / Wastewater Vendor	Submitted	5/18/2022, 4:03 PM	Steve Smith

10. From the drop-down menu, select **ENROLLED**, then check the **UPDATE (ALL) SELECTED ITEMS**. Click **APPLY**.



Account Name	Provider County	Primary Category	Provider Status	Created Date ↓	Primary Contact
<input checked="" type="checkbox"/> Steve's Utilities	Alamance	Water / Wastewater Vendor	Enrolled		Steve Smith
<input checked="" type="checkbox"/> Steve's Utilities	Alexander	Water / Wastewater Vendor			Steve Smith

11. Confirm that the changes highlighted in yellow are correct, then click **SAVE**.



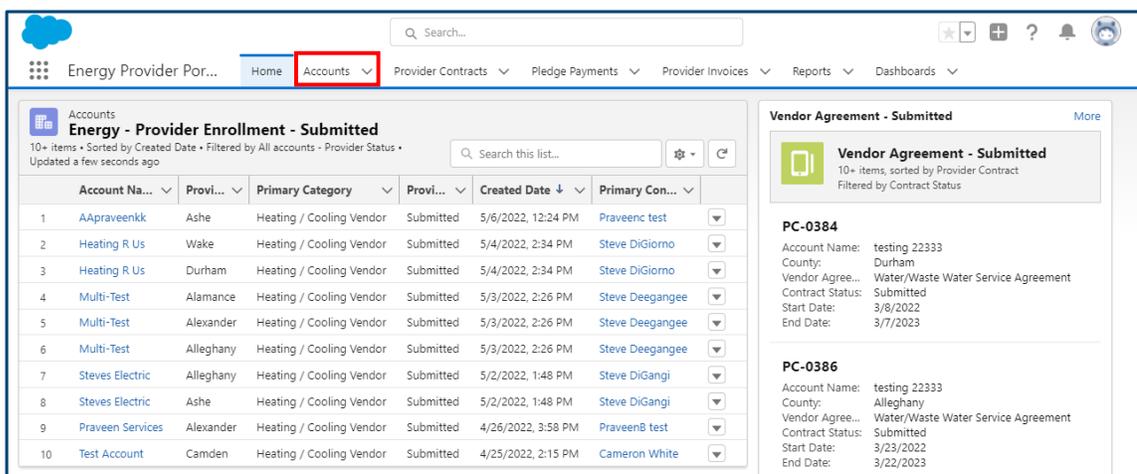
Account Name	Provider County	Primary Category	Provider Status	Created Date	Primary Contact
Steve's Utilities	Alamance	Water / Wastewater Vendor	Enrolled	5/18/2022, 4:03 PM	Steve Smith
Steve's Utilities	Alexander	Water / Wastewater Vendor	Enrolled	5/18/2022, 4:03 PM	Steve Smith

12. The screen will refresh and a green banner will appear at the top of the screen, letting you know that the provider's accounts are now enrolled and they will now start receiving pledge payment records.

6. View & Edit Utility Provider Account Details

At any point, you may view the details of a utility provider's account. Navigating to a specific utility provider's account record is also a quick way to view and access all other records that are associated to an account such as contracts, pledge payments, invoices, or contacts.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME TAB**.
2. Select the **ACCOUNTS** tab from the navigation bar.



Account Na...	Provi...	Primary Category	Provi...	Created Date	Primary Con...
AApraveenkk	Ashe	Heating / Cooling Vendor	Submitted	5/6/2022, 12:24 PM	Praveenc test
Heating R Us	Wake	Heating / Cooling Vendor	Submitted	5/4/2022, 2:34 PM	Steve DiGiorno
Heating R Us	Durham	Heating / Cooling Vendor	Submitted	5/4/2022, 2:34 PM	Steve DiGiorno
Multi-Test	Alamance	Heating / Cooling Vendor	Submitted	5/3/2022, 2:26 PM	Steve Deegangee
Multi-Test	Alexander	Heating / Cooling Vendor	Submitted	5/3/2022, 2:26 PM	Steve Deegangee
Multi-Test	Alleghany	Heating / Cooling Vendor	Submitted	5/3/2022, 2:26 PM	Steve Deegangee
Steves Electric	Alleghany	Heating / Cooling Vendor	Submitted	5/2/2022, 1:48 PM	Steve DiGangi
Steves Electric	Ashe	Heating / Cooling Vendor	Submitted	5/2/2022, 1:48 PM	Steve DiGangi
Praveen Services	Alexander	Heating / Cooling Vendor	Submitted	4/26/2022, 3:58 PM	PraveenB test
Test Account	Camden	Heating / Cooling Vendor	Submitted	4/25/2022, 2:15 PM	Cameron White

3. On the Accounts tab, you will initially see a **LIST VIEW** showing the most recently viewed accounts, as well as some basic information.



- From here, you may select a different list view by clicking the dropdown arrow and choosing a different list view.

Note: After selecting a different list view, you can make that your default list view by clicking on the push pin icon.

The screenshot shows the 'Energy - All Provider Accounts' page. A red box highlights the account name 'AApraveenk' in the first row of the table. The table has columns for Account Name, Provider, Primary Category, Provider Status, Primary Contact, Last Modified Date, and Last Modified Time. There are 6 rows of data visible.

	Account Name	Provider	Primary Category	Provide...	Primary Contact	Last ...	Last Modified Date
1	AApraveenk	Ashe	Heating / Cooling Vendor	Submitted	Praveenc test	80tes	5/6/2022, 12:24 PM
2	AApraveenProviderTODAY	Cleveland	Heating / Cooling Vendor	Open	praveen test	112te	4/29/2022, 11:53 A...
3	AAtestpk	Brunswick	Water / Wastewater Vendor	Enrolled	praveenS test	pkona	5/6/2022, 11:33 AM
4	AAtestpk	Hoke	Water / Wastewater Vendor	Enrolled	praveenS test	pkona	5/6/2022, 11:33 AM
5	ABC Utilities	Alamance	Water / Wastewater Vendor	Submitted	Lacey Crews	76Cre	3/31/2022, 2:15 PM
6	ABC Utilities	Alexander	Water / Wastewater Vendor	Open	Lacey Crews	76Cre	3/31/2022, 2:11 PM

- You may also search the list of account records by using the search bar on the top right of the screen. You can search by account name, primary category, county, FEIN/SSN, provider status, primary fuel (if applicable), and Approved Non-Federal CIP Fund.

Note: Each utility provider can have several provider account records based on which utilities they provide and which counties they service. Be sure to check the account name, primary category, and county to find the desired account.

- Once you've found the desired account, click on the **ACCOUNT NAME** to be brought to the account details page.

The screenshot shows the 'Energy - All Provider Accounts' page with a search filter 'Heating R Us' applied. A red box highlights the search bar. The table now shows 4 items. The first row is highlighted with a red box around the account name 'Heating R Us'.

	Account Name	Provider Co...	Primary Category	Provider Status	Primary Contact	Last Modi...	Last Modified Date
1	Heating R Us	Wake	Heating / Cooling Vendor	Submitted	Steve DiGiorno	83DiG	5/4/2022, 2:41 PM
2	Heating R Us	Durham	Heating / Cooling Vendor	Submitted	Steve DiGiorno	83DiG	5/4/2022, 2:41 PM
3	Heating R Us	Wake	Water / Wastewater Vendor	Enrolled	Steve DiGiorno	SDiGa	5/10/2022, 5:09 PM
4	Heating R Us	Robeson	LTNC Heating / Cooling Vendor	Open	Steve DiGiorno	83DiG	5/6/2022, 12:41 PM

- On the **DETAILS** tab of the account page, you will see all the information the utility provider submitted as part of their enrollment application.

NOTE: Providers that were pre-loaded into the Energy Provider Portal by NCDHHS will be responsible for populating their Primary Contact and Email Address fields.



The screenshot displays the 'Account' page for 'Heating R Us' in the 'Energy Provider Portal'. The 'Details' tab is selected and highlighted with a red box. The account information is as follows:

Account Name	Heating R Us	Primary Contact	Steve DiGiorno
Enrollment Start Date	5/4/2022	Email Address	stevend@mailinator.com
Enrollment End Date		Website	https://www.heating.com
Primary Category	Heating / Cooling Vendor	Phone	(111) 222-3333
Primary Fuel Type	LP Gas		
FEIN	919191919		
SSN			
Provider Access Code	52401121		
Provider County	Wake		
Approved Non-Federal CIP Fund			

Below the details is an 'Account Summary' section with the following information:

Provider Status	Submitted
Reason For Rejection	
Reason For Suspension	

A notification on the right side of the page states: 'NCFast API Error Reporter is ready and listening'.

8. In addition, the **RELATED** tab will show quick links to all other records associated to this utility provider's account including:
 - a. **Provider Contracts:** All vendor agreements submitted by the utility provider.
 - b. **Related Contacts:** The individual utility provider users who are associated to this provider account.
 - c. **Pledge Payments:** Each record of a payment amount allocated by the county to be paid to the utility provider on behalf of an individual.
 - d. **Provider Invoices:** Each invoice record indicating how much a utility provider is charging the county for an individual's utility usage.
 - e. **Account History:** A detailed log of each field on the account record that has been changed, and what it changed from and to.
9. If you've received a request from a provider or from the NC FAST Provider Support Center to update a provider's account information, you may do so by selecting the **EDIT** button or selecting the **DETAILS** tab and clicking on the **PENCIL ICON** next to any field. This will open the ability to edit the account details.

Note: Never update information within the **SYSTEM INFORMATION** section of the account. Doing so may result in integration issues with NC FAST.



Energy Provider Por... Home Accounts Provider Contracts Pledge Payments Provider Invoices Reports Dashboards

Account **Heating R Us** Edit

Provider County: Wake Primary Category: Heating / Cooling Vendor Provider Status: Submitted

Related **Details**

Account Name	Heating R Us	/	Primary Contact	Steve DiGiorno	/
Enrollment Start Date	5/4/2022	/	Email Address	stevend@mailinator.com	/
Enrollment End Date		/	Website	https://www.heating.com	/
Primary Category	Heating / Cooling Vendor	/	Phone	(111) 222-3333	/
Primary Fuel Type	LP Gas	/			
FEIN	919191919	/			
SSN		/			
Provider Access Code	52401121	/			
Provider County	Wake	/			
Approved Non-Federal CIP Fund		/			

Account Summary

Provider Status	Submitted	/
Reason For Rejection		/
Reason For Suspension		/

NCFast API Error Reporter is ready and listening

10. This will open the edit screen, allowing you to make changes to any necessary fields. As you edit the field, unsaved changes will highlight yellow. Click **SAVE**.

Notes: There are several notes to keep in mind when updating provider account details:

- If you attempt to update the county on a provider's account to a county where that provider already has an existing account (e.g. updating an account from Durham county to Wake county when the provider already has an existing Wake county account), you will receive an error.
- Whenever you are updating the Provider Status, you should only select **ENROLLED**, **REJECTED**, **SUSPENDED**, or **CLOSED** as necessary. You should not update a provider's status to any of the other available options.
- Do not change an already **ENROLLED** provider back to **SUBMITTED** status.



The screenshot shows the 'Account Heating R Us' page in the Energy Provider Portal. The 'Primary Fuel Type' section has 'Coal', 'Electricity', 'Fuel Oil', and 'Kerosene' in the Available list, and 'LP Gas' in the Chosen list. The 'Approved Non-Federal CIP Fund' section has 'Share the Light', 'NC Rate Settlement', 'Helping Each Mem...', and 'Helping Hands' in the Available list, and 'Wake Electric Round ...' in the Chosen list. The 'FEIN' field contains '919191919', 'SSN' is empty, 'Provider Access Code' is '52401121', and 'Provider County' is 'Wake'. The 'Save' button is highlighted in red.

7. View Pledge Payment Records

When a North Carolina resident applies for and is accepted into a utility assistance program through NC FAST, the government will determine and allocate a one-time pledge payment amount, which is then sent to the Energy Provider Portal as a non-editable record. The pledge payment record will be associated to the servicing provider, the county of service, and the resident who receives assistance. The utility provider then uses that pledge payment to create and submit one invoice to the county. The invoice will be processed by the county.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME TAB**.

2. Navigate to the **PLEDGE PAYMENTS** tab.

Note: You may view pledge payment records, but you will not be able to edit them in any way.

3. The default list view will show the most recent pledge payment records that you have viewed along with some basic information.



- From here, you may select a different list view by clicking the dropdown arrow and choosing a different list view.

Note: After selecting a different list view, you can make that your default list view by clicking on the push pin icon.

Pledge...	Accoun...	Account Hold...	Applica...	Pledg...	Energy Provider	County	Progr...	Paym...	Created Date	
1	PP-7659	test	test	teseet	\$344.00	PPSP3	Ashe	test	Regular	5/10/2022, 1:10 PM
2	PP-7658	A7847759	Johnny Appleseed	R4759888	\$75.00	Itnc valid county enrollment	Cumberland	LIEAP	Regular	5/10/2022, 11:23 AM
3	PP-7648	A124479	Jessica Lewis	A479535	\$50.00	Wake Utilities	Burke	CIP	Regular	4/29/2022, 1:58 PM
4	PP-7654			Jtest			Bladen	Active	Regular	5/5/2022, 5:08 PM

- You may also search the list of pledge payment records by using the search bar at the top right of the screen.
- Find the desired pledge payment record, either by account holder's name, account number, application reference number, program type, payment type, or payment status.

Note: Since residents must apply for assistance on a per-bill basis, it is possible to see multiple results when searching for an individual if they have been approved for assistance more than once.

Pledge...	Accoun...	Account Hold...	Applica...	Pledg...	Energy Provider	County	Pro...	Payment Type	Created Date	
1	PP-7648	A124479	Jessica Lewis	A479535	\$50.00	Wake Utilities	Burke	CIP	Regular	4/29/2022, 1:58 PM

- Click on the pledge payment record to view the following information:
 - Energy Provider:** The provider account who services the individual's utilities.
 - County:** The county where the service is provided.
 - Application Date:** The date the resident applied for assistance.
 - Account Number:** The unique identifier of the North Carolina resident's energy assistance account.
 - Account Holder's Name:** The North Carolina resident who is receiving utility assistance.



- f. **Application Reference:** The unique identifier that corresponds to the individual's application for energy assistance.
- g. **Pledged Amount:** The maximum dollar amount of one-time assistance that has been approved by the government.
- h. **Program Type:** The program (e.g. Crisis Intervention Program (CIP), Low Income Household Water Assistance Program (LIHWAP), etc) from where the funds are being drawn for the payment.
- i. **Payment Type:** The category of payment being made.
 - i. Regular: A standard Pledge Payment.
 - ii. Underpayment: Additional funds paid to the provider to cover the difference between pledged amount and invoiced amount.
 - iii. Overpayment: A return of funds to the county to cover the difference between pledged amount and invoiced amount.
 - iv. Supplement: Additional disbursement of funds from remaining program amount.

Note: Providers are not required to take action on any pledge with a payment type of Underpayment, Overpayment, or Supplement payment, but they may track them using the customer's Application Reference Number which will be the same as the initial pledge that was either underpaid or overpaid.
- j. **Payment Status:** The current standing of the payment being made from the county to the provider.
 - i. Payment Request Pending: The pledge has been created.
 - ii. Payment Pending: The payment was submitted in NC FAST.
 - iii. Payment Issued: Check has been disbursed.
 - iv. Payment Canceled: Payment will not be issued.
- k. **Payment Reference:** An auto-generated unique identifier for the one-time payment associated to this pledge payment/invoice.
- l. **Payment Issue Date:** The date the payment was issued by the county.



The screenshot shows the 'Pledge Payment' page for Jessica Lewis. At the top, there is a search bar and navigation tabs: Home, Accounts, Provider Contracts, Pledge Payments (selected), Provider Invoices, Reports, and Dashboards. Below the navigation, the page title is 'Pledge Payment Jessica Lewis' with a 'New Provider Invoice' button. The main content area displays the following information:

Account Number	A124479	Application Reference	A479535	Pledged Amount	\$50.00
----------------	---------	-----------------------	---------	----------------	---------

Details

Energy Provider	Wake Utilities	Account Number	A124479
County	Burke	Account Holder's Name	Jessica Lewis
Application Date	4/1/2022	Application Reference	A479535
Is Payment Active	<input checked="" type="checkbox"/>	Pledged Amount	\$50.00

Payment Details

Program Type	CIP
Payment Type	Regular
Payment Status	Payment Issued
Payment Reference	P1547982
Payment Issue Date	4/5/2022

Created By: Lacey Crews - 4/29/2022, 1:58 PM | Last Modified By: Lacey Crews - 5/9/2022, 1:59 PM

8. If a utility provider has used this pledge payment record to create an invoice, you may click on the invoice record from the **PROVIDER INVOICES** tile at the bottom of the screen.

This screenshot is identical to the one above, but with the 'Provider Invoices' section at the bottom highlighted with a red box. The 'Provider Invoices (1)' section shows a table with one record:

Provider Invoice	Account	Current Amount Due	Past Amount Due	Total Amount Due
<input type="checkbox"/> PI-0947	Wake Utilities	\$100.00		\$100.00

8. View Invoice Records

When a utility provider uses a pledge payment to create and submit an invoice to the county, each of the created invoices will be saved in the Energy Provider Portal. The invoices will be associated to the provider as well as to the pledge payment that was used to create the invoice. Invoices can be edited by the providers, but you as a State Information Support user will not be able to edit an invoice record.

Utility providers are encouraged to submit invoices via the Energy Provider Portal but it is not a requirement. Providers will still receive funds for any assistance application that is approved. If a provider submits an invoice where the invoiced amount does not match the pledged amount (e.g. an overpayment or underpayment) the county caseworker who approved the pledge amount will investigate the invoice and take corrective action.

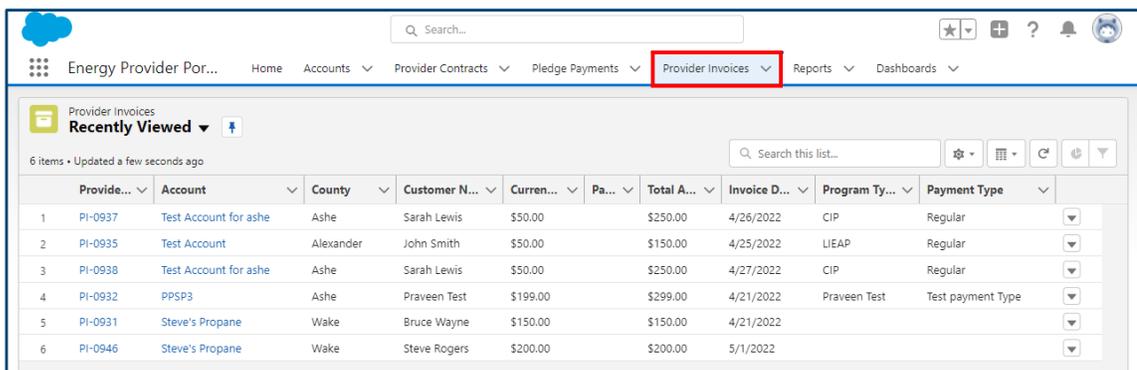
Note: Each pledge payment record can be associated to only one invoice.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME TAB**.
2. Navigate to the **PROVIDER INVOICES** tab.

Note: You may view invoice records, but you will not be able to edit them in any way. Only providers or county staff acting on behalf of providers may edit the invoices they have generated.

3. The default list view will show the most recent invoice records that you have viewed, along with some basic information.
4. From here, you may select a different list view by clicking the dropdown arrow and choosing a different list view.

Note: After selecting a different list view, you can make that your default list view by clicking on the push pin icon.



Provide...	Account	County	Customer N...	Curren...	Pa...	Total A...	Invoice D...	Program Ty...	Payment Type
1	PI-0937	Test Account for ashe	Ashe	Sarah Lewis	\$50.00	\$250.00	4/26/2022	CIP	Regular
2	PI-0935	Test Account	Alexander	John Smith	\$50.00	\$150.00	4/25/2022	LIEAP	Regular
3	PI-0938	Test Account for ashe	Ashe	Sarah Lewis	\$50.00	\$250.00	4/27/2022	CIP	Regular
4	PI-0932	PPSP3	Ashe	Praveen Test	\$199.00	\$299.00	4/21/2022	Praveen Test	Test payment Type
5	PI-0931	Steve's Propane	Wake	Bruce Wayne	\$150.00	\$150.00	4/21/2022		
6	PI-0946	Steve's Propane	Wake	Steve Rogers	\$200.00	\$200.00	5/1/2022		



5. You may also search the list of invoice records by using the search bar at the top right of the screen.
6. Find the desired invoice record. You cannot search by amount due or by customer name. You can search by customer address, zip code, or the invoice record number.

Note: Since residents must apply for assistance on a per-bill basis, it is possible to see multiple results when searching for an individual if they have been approved for assistance more than once. In these instances, look for the invoice date to validate that you've found the desired invoice.

Provid...	Account	County	Customer N...	Current Amou...	P...	Total Am...	Invoice ...	Program Ty...	Payment Type
1	Pi-0947	Wake Utilities	Burke	Jessica Lewis	\$100.00	\$100.00	5/9/2022	CIP	Regular

7. Click on the invoice record to view the following information:
 - a. **Provider Invoice:** The unique record of the payment made to the utility provider on behalf of an individual.
 - b. **Account:** The Utility provider who is servicing the resident's utilities.
 - c. **Current Amount Due:** Amount of money currently due for the resident's utility usage.
 - d. **Pledge Payments:** A hyperlink to the pledge payment record that is associated to this invoice record.

Note: Residents apply for assistance on a per-bill basis, meaning that each pledge payment should have only **ONE** invoice associated to it.
 - e. **Customer Name:** Name of the resident who receives energy assistance.
 - f. **Account Number:** The unique identifier of the North Carolina resident's utility assistance account.
 - g. **Service Address:** The home address where the resident receives energy assistance.
 - h. **Service City:** The city where the resident receives energy assistance.
 - i. **Service State:** The state where the resident receives energy assistance (North Carolina).
 - j. **Service Zip Code:** The zip code where the resident receives energy assistance.



- k. **Program Type:** The program (e.g. Crisis Intervention Program (CIP), Low Income Household Water Assistance Program (LIHWAP), etc) from where the funds are being drawn for the payment.
- l. **Payment Type:** The category of payment being made.
 - i. Regular: A standard Pledge Payment.
 - ii. Underpayment: Additional funds paid to the provider to cover the difference between pledged amount and invoiced amount.
 - iii. Overpayment: A return of funds to the county to cover the difference between pledged amount and invoiced amount.
 - iv. Supplement: Additional disbursement of funds from remaining program amount.

The screenshot shows the 'Energy Provider Portal' interface. The main content area displays a 'Provider Invoice' for 'Wake Utilities'. The invoice summary shows an account number of A124479, customer name Jessica Lewis, and a total amount due of \$100.00. Below this, a 'Details' section is highlighted with a red box, containing the following information:

Provider Invoice	PI-0947	Service Address	123 main
Account	Wake Utilities	Service City	Raleigh
Current Amount Due	\$100.00	Service Zip Code	12345
Pledge Payments	PP-7648		
Customer Name	Jessica Lewis		
Account Number	A124479		
Service State	NC		
Invoice Date	5/9/2022		
Program Type	CIP		
Payment Type	Regular		

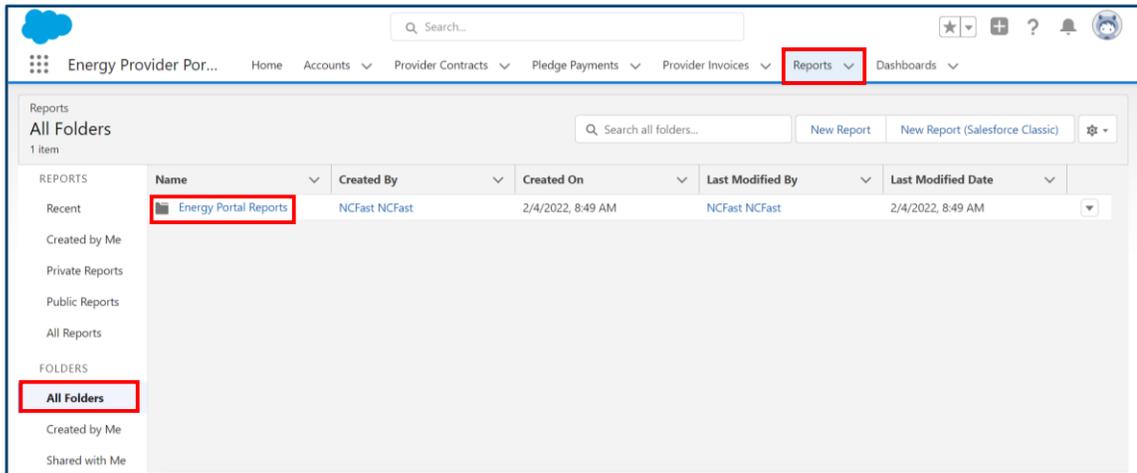
At the bottom of the details section, it indicates the invoice was created and last modified by Lacey Crews on 5/9/2022 at 4:20 PM.

9. Reports

To view and analyze large amounts of data at once, you will have access to the **REPORTS** tab. From the Reports tab, you can see pre-built lists of data displayed in rows and columns, which can be filtered, sorted, or exported into Microsoft Excel files. You can access reports at any time.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME TAB**.
2. Select the **REPORTS** tab from the navigation bar.

3. Click on **ALL FOLDERS** from the filter on the left side of the screen.
4. Select **ENERGY PORTAL REPORTS**.

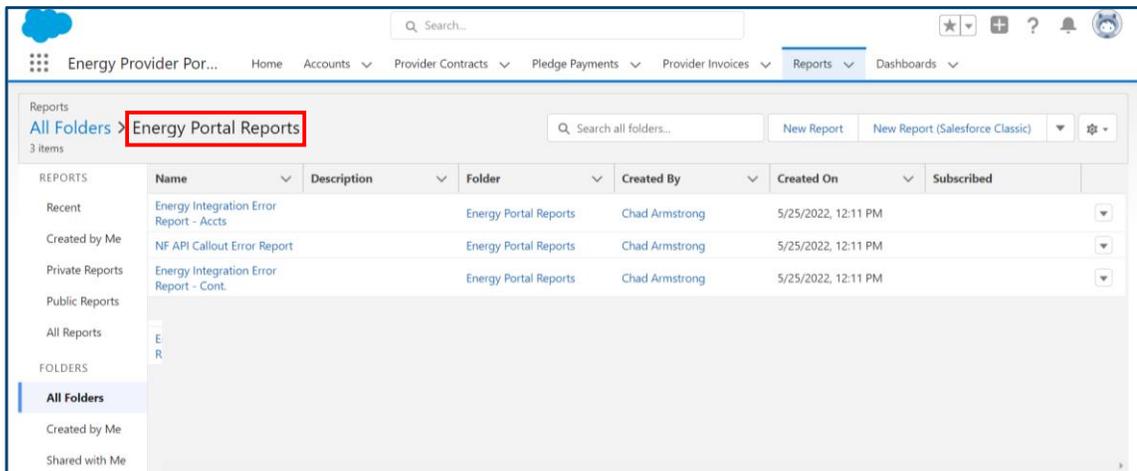


Reports

All Folders

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Energy Portal Reports	NCFast NCFast	2/4/2022, 8:49 AM	NCFast NCFast	2/4/2022, 8:49 AM

5. Click on the report you wish to view.

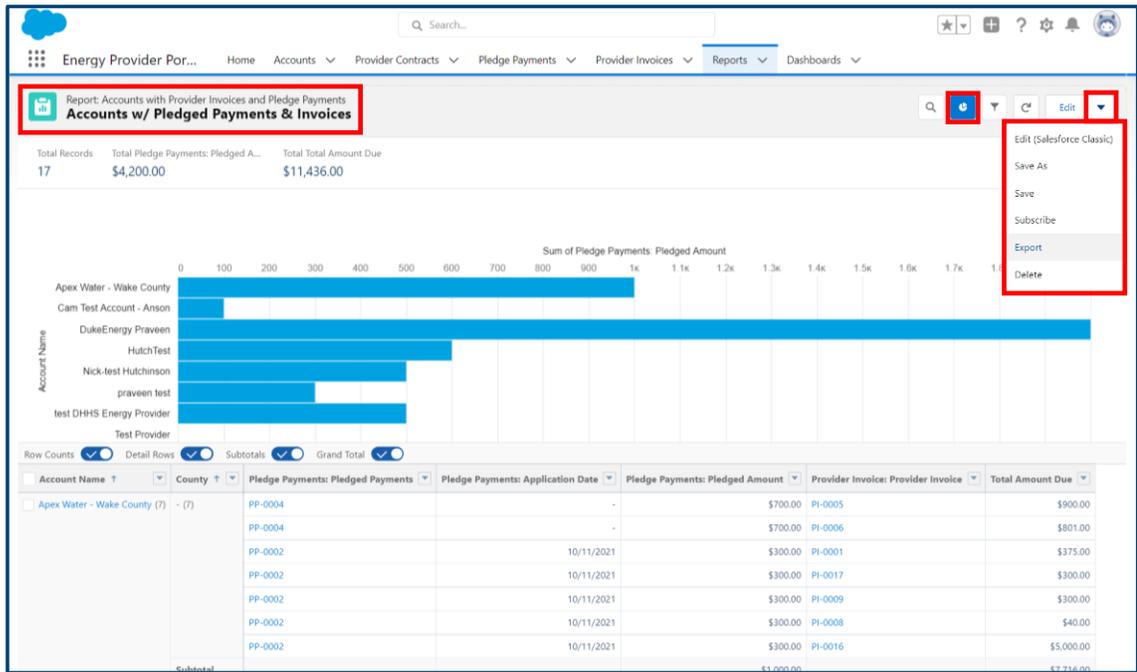


Reports

All Folders > Energy Portal Reports

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	Energy Integration Error Report - Accts		Energy Portal Reports	Chad Armstrong	5/25/2022, 12:11 PM	
Created by Me	NF API Callout Error Report		Energy Portal Reports	Chad Armstrong	5/25/2022, 12:11 PM	
Private Reports	Energy Integration Error Report - Cont.		Energy Portal Reports	Chad Armstrong	5/25/2022, 12:11 PM	

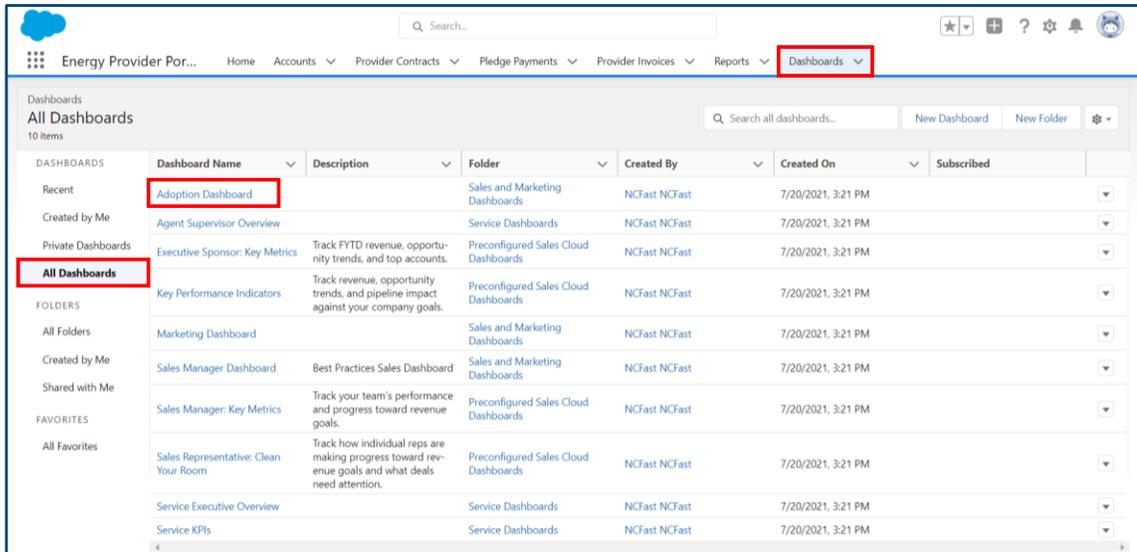
6. View the report as a chart by selecting the **CHART** icon.
7. Filter the report by clicking on the **FILTER** icon.
8. Export the report to a Microsoft Excel (.xlsx) file by selecting the drop-down arrow and clicking **EXPORT**.



10. Dashboards

If you would like to see a visual representation of multiple reports, you can create a custom dashboard by navigating to the **DASHBOARDS** tab. When viewing a dashboard, you will see multiple tiles showing a visual representation of data all on one screen, allowing you to quickly absorb information and context at a glance.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME TAB**.
2. Select the **DASHBOARDS** tab from the navigation bar.
3. Select **ALL DASHBOARDS** from the filter on the left side of the screen.

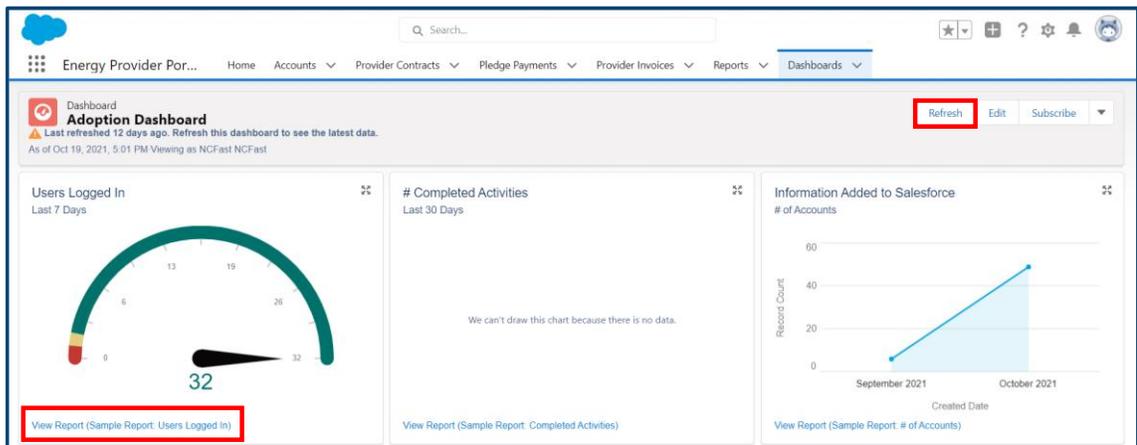


Energy Provider Por... Home Accounts Provider Contracts Pledge Payments Provider Invoices Reports **Dashboards**

Dashboards
All Dashboards 10 items

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Adoption Dashboard		Sales and Marketing Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	
Created by Me	Agent Supervisor Overview		Service Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	
Private Dashboards	Executive Sponsor: Key Metrics	Track FYTD revenue, opportunity trends, and top accounts.	Preconfigured Sales Cloud Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	
All Dashboards	Key Performance Indicators	Track revenue, opportunity trends, and pipeline impact against your company goals.	Preconfigured Sales Cloud Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	
FOLDERS						
All Folders	Marketing Dashboard		Sales and Marketing Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	
Created by Me	Sales Manager Dashboard	Best Practices Sales Dashboard	Sales and Marketing Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	
Shared with Me	Sales Manager: Key Metrics	Track your team's performance and progress toward revenue goals.	Preconfigured Sales Cloud Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	
FAVORITES						
All Favorites	Sales Representative: Clean Your Room	Track how individual reps are making progress toward revenue goals and what deals need attention.	Preconfigured Sales Cloud Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	
	Service Executive Overview		Service Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	
	Service KPIs		Service Dashboards	NCFast NCFast	7/20/2021, 3:21 PM	

4. Search for and click on the dashboard you would like to view.
5. Click the **REFRESH** button.
6. To view the details of a specific report, select the **VIEW REPORT** link at the bottom of the tile.



Dashboard **Adoption Dashboard** Refresh Edit Subscribe

Last refreshed 12 days ago. Refresh this dashboard to see the latest data.
As of Oct 19, 2021, 5:01 PM Viewing as NCFast NCFast

Users Logged In	# Completed Activities	Information Added to Salesforce
Last 7 Days 32	Last 30 Days We can't draw this chart because there is no data.	# of Accounts Line chart showing increase from September to October 2021.

View Report (Sample Report: Users Logged In)

11. Resolving Errors

There are some instances in which integration errors occur between the Energy Provider Portal and NC FAST when making edits to a provider's account.

1. Any time an integration sync is successful, users will see a pop-up window letting them know that the data was sent to NC FAST.



- The right rail will also indicate the most recent date and time of the integration with NC FAST, as well as whether or not it was successful.

The screenshot shows the NC FAST interface for account 'Chad Smoke Test Water2'. A green notification box at the top right states 'NCFast Integration Success' with the message 'This data has been successfully sent to NCFast'. Below this, the 'NCFast API Reporter' section is highlighted with a red box, showing the following details:

NCFast API Reporter	
Last Sent	5/11/2022, 01:09 PM CDT
Last Status	SUCCESS
Last Message	NFEPO000

- If the integration is not successful, the pop-up window will inform users of the failure.

The screenshot shows the NC FAST interface for account 'Chad Smoke Test Water2'. A red notification box at the top right states 'NCFast Integration Error' with the message 'DHHBEA59999 - An internal ESB error has occurred'. Below this, the 'NCFast API Reporter' section is highlighted with a red box, showing the following details:

NCFast API Reporter	
Last Sent	5/11/2022, 12:57 PM CDT
Last Status	ESB_INTERNAL_ERROR - An internal ESB error has occurred
Last Message	ESB_INTERNAL_ERROR

- If the transaction that failed was an enrollment of an account, the account in question will revert to **SUBMITTED** status. Any other value that was changed will be automatically reverted back to its original value.
- To review the history of any account field that has been changed, navigate to the **ACCOUNT HISTORY** section all the way down the screen on the **RELATED** tab of the account record.



Account
Chad Smoke Test Water2

Primary Category: Water / Wastewater Vendor Provider Status: Enrolled

Related Details

Provider Contracts (1)

Provider Contract	Vendor Agreement Type	Contract Status	Start Date
PC-0454	Water/Waste Water Service ...	Active	6/1/2120

[View All](#)

Account History (6+)

Date	Field	User	Original Value	New Value
5/11/2022, 2:09 PM	Phone	Chad Armstrong	8179152793	8179152794

- The **ACCOUNT HISTORY** will show a log of the date and time of any change to an account field, who changed the field, and what it was changed from and to. This will be useful in instances where a provider is attempting to track an error or verify an update.

Energy Provider Por... Home Accounts Provider Contracts Pledge Payments Provider Invoices Reports Dashboards

Accounts > Chad Smoke Test Water2
Account History

50+ items • Sorted by Date • Updated a few seconds ago

	Date	Field	User	Original Value	New Value
1	5/11/2022, 2:09 PM	Phone	Chad	8179152793	8179152794
2	5/11/2022, 2:03 PM	Phone	Chad	8179152794	8179152793
3	5/11/2022, 2:01 PM	Phone	Chad	8179152793	8179152794
4	5/11/2022, 2:01 PM	Phone	Chad	8179152794	8179152793
5	5/11/2022, 2:00 PM	Phone	Chad	8179152795	8179152794
6	5/11/2022, 2:00 PM	Phone	Chad	8179152794	8179152795
7	5/11/2022, 1:59 PM	Phone	Chad	8179152793	8179152794
8	5/11/2022, 1:57 PM	Phone	Chad	8179152794	8179152793

12. Additional Resources & Help

For more information on how to use the Energy Provider Portal, please review the posted training materials within the Energy Provider Portal.

If you need additional help, please contact the **NC FAST PROVIDER SUPPORT CENTER** at 919-813-5460 Monday through Friday between 8:00 am ET and 6:00 pm ET.



Change Log

<u>Date of Change</u>	<u>Major Changes Made</u>
12/10/2021	<ul style="list-style-type: none">• Update to process of creating multiple accounts for the same organization and linking multiple accounts to one NCID login
6/17/2022	<ul style="list-style-type: none">• Added new Primary Categories (Heating/Cooling and LTNC Heating/Cooling) as well as Fuel Type field• Enabled providers to update their own SSN/FEIN and County in certain circumstances• Added validations prevent duplicate accounts• Added Non-Federal CIP Fund field• Added new fields to Pledge Payment records to indicate payment type, program, and status• Autoclose accounts if the Provider Status is Open for 12 months, or if the Provider Contract is expired for 12 months• Added Activate Multiple Contracts & Enroll Multiple Accounts section• Added Resolving Errors section