Energy Provider Portal – Utility Provider User

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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 state/county officials when providing assistance to low-income households.

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1. Register for an NCID Account

North Carolina Identity Management Service (NCID) is the standard identity management service that allows state, local, business, and individual users to access North Carolina’s applications and information systems in a secure, access-controlled manner. To log in to the Energy Provider Portal, you must have an active NCID.

1. To create a new NCID, navigate to https://ncid.nc.gov.
2. Click Register! In the bottom right corner of the blue box.
3. Select **BUSINESS** when asked to indicate your desired user type.
4. Complete each required field to create an NCID account. Once you complete the registration form, you will be sent an automated email asking you to authenticate your account and complete your security questions.

**Note:** You may not create an NCID username with any spaces in it.

5. After receiving the automated New NCID User Verification email, click on the link that says **CLICK HERE** or enter the 6-digit code received in the email and click **CONTINUE**.
6. Sign in again using your new NCID username and password.

7. Complete all five security questions by using the drop-down options and typing your answers into the free-text fields and click SAVE ANSWERS.

8. Your NCID account is now successfully created, and you can gain access to the Energy Provider Portal by either creating your utility provider account, or by using the appropriate access code if your provider account already exists.
2. Submit A Provider Enrollment Application

Before taking part in a utility assistance program, you must first submit a provider enrollment application for the counties where you are providing utilities, as well as submit a provider contract (vendor agreement) for the specific utility you wish to provide. After you submit an enrollment application via the Energy Provider Portal, a State Information Support user will be able to review and approve both the enrollment and the contract, which will allow you to begin submitting invoices to the county for North Carolina residents who receive utility assistance.

**Note:** Any utility provider whose account was created as part of a data load will not need to submit a provider enrollment application. You will receive a provider access code which you can use to log in to your existing account. Please refer to the [Logging in to Energy Provider Portal / Adding and Additional User](#) section of this job aid.

2. Click on the **NCID-ENERGY** button.

![Welcome to the North Carolina Energy Provider Portal](image)

3. Enter your NCID username and password, then click **NCID LOGIN**.
4. When prompted to enter your Provider Access Code, leave the field **BLANK** and click **NEXT**.

5. Select if your provider will be using a FEIN (Federal Employer Identification Number) or SSN (Social Security Number) and enter it into the field with no dashes. Click **NEXT**.

*Note:* Your FEIN or SSN may be associated to multiple Energy Provider Portal provider accounts because you service multiple counties or provide multiple
categories of utility. In these instances, they will be differentiated by the county and categories you select for the accounts.

6. Enter in each field in the next section and verify that the information is accurate, then click **NEXT**.

   a. **Provider / Company Name**: The name of the utility provider (40 characters or less).
      
      **Note**: Do not add the name of the county to the Provider / Company Name field.
   b. **Billing Street**: The street address of the provider.
   c. **Billing City**: The city of the provider.
   d. **Billing Zip Code**: The zip code of the provider.
   e. **Billing State**: The state of the provider.
   f. **Primary Category**: Indicates which category of utility you deliver.
   g. **Primary Fuel Type**: Indicates the type of fuel you provide.
      
      **Note**: This field only applies if your primary category is “Heating/Cooling” or “LTNC Heating/Cooling.”
   h. **Provider County**: Select the county or counties where utility services are provided.
      
      **Note**: If a provider services multiple counties, you must set up an Energy Provider Portal account for each county that you service. To do so, use the scroll bar in the **County** field to locate each serviced county. Select the county name and click the right arrow to choose that county. Repeat this process for each
county until you have moved each county you want to have an Energy Provider Portal account for into the right column. For more information on how you may associate multiple accounts to one NCID after enrollment, please refer to the [Create Additional Provider Accounts With The Same NCID](#) section of this job aid.

i. **Email Address**: The email address at which you can be reached.

j. **Web Address**: The utility provider website.

   *Note*: This is an optional field, but if entered it must be 100 characters or less.

k. **Phone Number**: The primary phone number for you to be contacted.

l. **I need to enroll an additional provider category**: This checkbox is used to indicate if you need to create another set of accounts with a different primary category selection (e.g., some accounts with water/wastewater, and some accounts with heating/cooling).

   *Note*: If you check this box, you will see a new screen asking for **Primary Category, Primary Fuel Type, and Provider County**. All other details such as name and address for these accounts will match what you entered on the previous screen.
<table>
<thead>
<tr>
<th>Provider / Company Name</th>
<th>Heating R Us</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing Street</td>
<td>123 Main St</td>
</tr>
<tr>
<td>Billing City</td>
<td>Raleigh</td>
</tr>
<tr>
<td>Billing Postal Code</td>
<td>12345</td>
</tr>
<tr>
<td>Billing State</td>
<td>NC</td>
</tr>
<tr>
<td>Primary Category</td>
<td>Heating / Cooling Vendor</td>
</tr>
<tr>
<td>Primary Fuel Type</td>
<td>LP Gas</td>
</tr>
</tbody>
</table>

If you would like to create multiple accounts with the same enrollment details for multiple counties, you can select multiple options in the following field by holding the Control key and clicking.

<table>
<thead>
<tr>
<th>Provider County</th>
<th>Wake</th>
<th>Durham</th>
</tr>
</thead>
<tbody>
<tr>
<td>DuPlin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edgecombe</td>
<td></td>
<td></td>
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<tr>
<td>Forsyth</td>
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<tr>
<td>Franklin</td>
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<tr>
<td>Gaston</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graham</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Email Address
stevend@mailinator.com

Web Address
http://www.heating.com

* Phone Number
1112223333

I need to enroll an additional provider category

Previous  | Next
7. If you selected to enroll an additional provider category, fill out the details of the accounts you would like to create. The name and contact information will automatically be the same as what you entered on the previous screen.

8. Review the categories and counties that you are creating accounts for to ensure you’ve selected the correct one(s) and click NEXT.
9. You are now logged in to the Energy Provider Portal. If you selected to create multiple accounts, you will see the PROVIDER HOME PAGE, a screen showing each of the created accounts. If you created only one account, you will see the COUNTY HOME PAGE, which is specific to that one account.

**Note:** At any point if you need to reach the PROVIDER HOME PAGE again so you can select a different account and view its COUNTY HOME PAGE, click the HOME tab.

10. The provider status for each account is now OPEN.

**Note:** If your account remains in OPEN status for 30 days, you will receive an email reminding you to submit the provider account for enrollment. Another reminder will be sent at 90 days. After 12 months in open status, the account will close automatically.
11. Depending on if you have created one account or multiple accounts, you will be able to click **SUBMIT PROVIDER ACCOUNT** on the **COUNTY HOME PAGE** or **SUMBIT PROVIDER ACCOUNTS** from the **PROVIDER HOME PAGE** to finish your enrollment application.

![Image of the North Carolina Energy Provider Portal]

12. If you selected **SUBMIT PROVIDER ACCOUNTS** on the **PROVIDER HOME PAGE**, you will see a pop-up window asking you to select which primary category you want to submit accounts for, or if you have only one primary category, which county accounts to submit. Select which accounts you are ready to submit and click **NEXT**.
13. A SUBMIT PROVIDER ACCOUNT pop-up window will appear. Click NEXT to submit the enrollment application.
14. Once you’ve submitted your enrollment application, click NEXT again. You will immediately be prompted to submit a PROVIDER CONTRACT (vendor agreement). You must submit a provider contract for your enrollment application to receive approval.

15. In the SUBMIT PROVIDER ACCOUNT pop-up window, enter the START DATE field, which represents the beginning of the utility provider’s agreement with the county.

Notes: There are a few things to keep in mind when submitting the provider contract:

- The start date can be up to 30 days in the past from the date of submission.
- If you have submitted multiple accounts for enrollment simultaneously, they will each have the same start date based on what you select.
- Each account has its own unique provider contract that can be downloaded as a PDF once active.

16. Read and review the terms and conditions of your vendor agreement with the county that is now displayed in the pop-up window.

17. Check the I AGREE TO THE TERMS & CONDITIONS box at the bottom of the screen and click SUBMIT.
18. Click **FINISH**.

19. If the Contract Status is still in a **SUBMITTED** status (not yet activated by the State Information Support user), changes to the start date can still be made. Please see
the **VIEW & EDIT PROVIDER CONTRACTS** section of this job aid for more information.

20. Your provider enrollment application and vendor agreement will now wait for approval and activation from a State Information Support user. If the account is closed or rejected by the State Information Support user, you may go through the process again and re-submit the provider account for enrollment.

**Notes:** You will receive several automated email reminders throughout the process including:

- When you submit an enrollment application.
- When a State Information Support user updates your provider account to **ENROLLED** status.
- When a State Information Support user updates your provider account to **CLOSED** status.
- When a State Information Support user rejects your provider enrollment application.
- When an active contract of yours is 30 days from expiring.
- When an active contract of yours expires.

### 3. Logging In to Energy Provider Portal / Adding an Additional User

To log in to the Energy Provider Portal for the first time, you must either be creating the provider account, or you must have the **PROVIDER ACCESS CODE** to get associated to an existing provider account. For more information on creating the provider account, see the **SUBMIT A PROVIDER ENROLLMENT APPLICATION** section of this job aid.

1. To log in to the Energy Provider Portal, open your browser and navigate to https://energyproviderportal.nc.gov.

   **Note:** For the best user experience, use one of the recommended browser applications including: Google Chrome, Microsoft Edge Chromium, Apple Safari, or Mozilla Firefox.

2. Click the **NCID-ENERGY** button.
3. Enter your NCID username and password, then click **NCID LOGIN**.

4. If this is the first time logging in to an existing provider account, you will be prompted to enter the provider access code for your existing provider location (this can only be located by someone who currently has access to the account by logging in to the Energy Provider Portal and viewing the **DETAILS** section of an account’s **COUNTY HOME PAGE**).
Note: You will only need to enter the access code the first time you are gaining access to an account. Each subsequent login will only require your NCID and password.

5. Verify that the account you are being added to is the intended account.

6. Click NEXT.
7. If the Provider Access Code you entered belongs to a provider that has multiple accounts for multiple counties/utilities, you will be prompted to add access to the additional accounts. To gain access to those accounts, select the corresponding checkbox next to each account (Name, County Primary Category) that you would like access to. Once you’ve selected all the accounts you want to access, select NEXT.

8. You are now logged in to the Energy Provider Portal.

**Note:** If you are a utility provider whose account was created as part of a data load and you are logging in to the Energy Provider Portal for the first time, you must enter your PRIMARY CONTACT, and EMAIL ADDRESS information in your account.
details. For more information on how to edit your account details, please see the Update Provider Account Details section of this Job Aid.

9. If you receive a SINGLE SIGN-ON ERROR message, close all instances of your browser, and attempt to log in again. If unsuccessful, attempt to log in using Incognito mode, or restart your computer.

4. Navigating the Energy Provider Portal

Upon logging in to the Energy Provider Portal, utility provider users will be taken to the PROVIDER HOME PAGE or the COUNTY HOME PAGE depending on how many accounts you have access to. From the PROVIDER HOME PAGE, you will be able to select an account in which to operate. From the COUNTY HOME PAGE, you will be able to view a summary of relevant information from one account as well as navigate to specific records that require your attention.

1. If you have access to only one account, the first thing you will see upon logging in to the Energy Provider Portal is the COUNTY HOME PAGE screen. This screen can be accessed at any time by clicking on HOME on the NAVIGATION BAR.

If you have access to multiple accounts, you will see the PROVIDER HOME PAGE when logging in. You may select an account in which you want to operate, which will take you to the COUNTY HOME PAGE. Clicking on the HOME tab will take you back to the PROVIDER HOME PAGE.
2. The County Home Page’s default display will show multiple different tiles with a summary of your information. Navigating using the tiles will show information associated only to the account you’ve selected including:

   a. **Account Information**: This tile displays a summary of your account information, with additional information shown on the DETAILS tab. Included in the DETAILS tab is your PROVIDER ACCESS CODE which is used to grant access to your account to new users.

   b. **Provider Contracts**: This tile displays contract information for any current or past contracts entered with the county.

   c. **Related Contacts**: This tile displays the name, email, and phone number for each individual who has access to this provider account in the Energy Provider Portal.

   d. **Pledge Payments**: This tile displays the most recent pledge payment records that you’ve viewed.

   e. **Provider Invoices**: This tile displays the most recent provider invoices that you’ve viewed.
3. The next tab on the navigation bar is the **PROVIDER CONTRACTS** tab. The Provider Contracts Tab is where you can search for and view vendor agreement after enrolling as a utility provider. The Provider Contract record contains information...
about the type of vendor agreement, the start and end date of the vendor agreement, and the terms of service.

**Note:** Unlike the tiles on a **COUNTY HOME PAGE**, using the **NAVIGATION BAR** will display results from all the accounts you have access to.

![NAVIGATION BAR Image](image.png)

4. 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 PAYMENTS Image](image.png)

5. The next tab on the navigation bar is the **PROVIDER INVOICES** tab. The Provider Invoices tab is how you navigate to invoice records, which show the amount the utility provider is receives from the county for an individual’s utility usage and a link to the corresponding pledge payment record.
6. The final tab on the navigation bar is the HELP tab. On this tab, you will see some answers to frequently asked questions, as well as a button where you can navigate to training materials.

5. Update Provider Account Details

If you need to update the basic account information (e.g., contact information, account name, etc.) for your utility provider account, the change will not need to be re-approved by a State Information Support user. Certain fields will not be editable by you without calling the NC FAST Provider Support Center.
1. Log in to the Energy Provider Portal using your NCID, which will land you on the PROVIDER HOME PAGE or the COUNTY HOME PAGE. If you land on the PROVIDER HOME PAGE, select the account you wish to update.

2. At the top of the screen, click the EDIT button, or select the DETAILS tab and click on any pencil icon.

   **Notes:** There are several important factors to keep in mind when editing account details:

   - If you created multiple provider accounts during your enrollment application for the multiple counties where you provide service, they will all appear with the same account name. Use the PRIMARY CATEGORY and COUNTY fields to verify that you are updating the intended account.
   
   - If your Primary Contact field and Email Address field appear as blank, your utility provider account was created through a data load, and you must enter information in these fields to properly sync with NC FAST Portal.

3. Make any necessary changes and click SAVE.

   **Notes:** There are several important notes regarding when you can update fields:
• If the PROVIDER STATUS field shows that your provider enrollment application is still in OPEN status, you will be able to edit any field except for PROVIDER ACCESS CODE.

• If the PROVIDER STATUS field shows that the provider enrollment application is in SUBMITTED status, you will not be able to update PROVIDER ACCESS CODE, PRIMARY CATEGORY, or PRIMARY FUEL TYPE.

• If the PROVIDER STATUS field shows that your provider enrollment application is in SUBMITTED status, and you attempt to update the COUNTY field to a value that would result in a duplicate account (e.g., updating an account from Durham County to Wake County when you already have an existing Wake County account) you will receive an error.

• If the enrollment application has already been approved, and the PROVIDER STATUS shows as ENROLLED, then you will not be able to edit the PROVIDER ACCESS CODE, PRIMARY CATEGORY, PRIMARY FUEL TYPE, SSN, FEIN, or COUNTY fields. To make edits to any of those fields once enrolled, you will need to contact the NC FAST Provider Support Center at 919-813-5460.

4. A green success banner will appear at the top of the screen, letting you know that the change was successfully made.
6. Create New Provider Contract (Vendor Agreement)

You may need to create and submit a new contract (vendor agreement) for approval on behalf of a provider, specifically if the provider’s existing contract is set to expire or is closed by the county.

1. Log in to the Energy Provider Portal using your NCID, which will land you either on the PROVIDER HOME PAGE or the COUNTY HOME PAGE.

2. Click the NEW VENDOR AGREEMENT button on the top right of the screen to open a NEW VENDOR AGREEMENT pop-up window. If you click the button from the PROVIDER HOME PAGE, then you can submit multiple contracts simultaneously. If you have accounts for multiple primary categories, you will select which type of vendor agreement to sign (e.g., Water/Wastewater, Home Energy Supplier Agreement, etc.). Then you select which counties to submit the contracts for by selecting the corresponding checkboxes.
3. If you selected **NEW VENDOR AGREEMENT** from the **COUNTY HOME PAGE**, you will see a simple pop-up appear.

4. Enter the **START DATE** and click **NEXT**.

   **Notes:** There are several factors to keep in mind with contract dates:
   - You must be within 30 days of the existing contract’s expiration date before submitting a new provider contract.
   - The start date can only be 30 days or fewer in the past, and provider contracts are defaulted to 12 months.
• If a contract already exists for the account for the 12-month period starting on the entered start date, you will receive an error message.
• If a contract remains expired for 12 months, the provider account will be automatically closed.

5. Read and review the terms and conditions of your vendor agreement with the county.

6. Check the I AGREE TO THE TERMS & CONDITIONS box at the bottom of the screen and click SUBMIT.
7. Click **FINISH**.

8. If you submitted multiple contracts simultaneously, each of the contracts for the corresponding accounts will have the same start date and will have their own unique PDF once they are activated.

**7. View & Edit Provider Contracts**

At any point, you may navigate to the **PROVIDER CONTRACTS** tab to review any past or present contracts.

1. Log in to the Energy Provider Portal using your NCID.
2. Navigate to the **PROVIDER CONTRACTS** tab.
3. The default list view will show the most recent provider contracts that you have viewed.

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.

5. Find the desired provider contract. You may search the list of provider contracts by using the search bar at the top right of the screen.

   **Note:** You cannot search by account name, start date, end date, or county. You can search by provider contract number, contract status, or vendor agreement type.

6. Click on the provider contract to view the following 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 assistance program of the contract.

d. **Vendor Agreement Type**: The type of agreement for the contract.

e. **Start Date**: The beginning of the utility provider’s agreement with the county.

f. **End Date**: The final date of the utility provider’s agreement with the county.

g. **Contract Status**: This field indicates whether the contract is currently submitted, activated, closed, or expired. When the contract reaches the end date, the contract status will automatically update to a status of **EXPIRED**.

h. **Contact**: Additional information shown includes the county, mailing address, zip code, phone number, and FEIN/SSN of the provider.

i. **Download as PDF**: This button is a downloadable PDF of the Terms & Conditions you agreed to when creating the new vendor agreement. Depending on your computer settings, this may open a new tab in your browser or begin a download to your Downloads folder. If multiple contracts were signed simultaneously, each will have its own unique PDF.

**Note**: Only contracts that are active may be downloaded.

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7. If the provider contract shows a contract status of **SUBMITTED**, you may edit the vendor agreement by clicking on any **PENCIL** icon.

**Note**: If the provider contract is already active, you cannot make any edits. You must contact the NC FAST Provider Support Center to have the provider contract closed, then you may re-submit a new provider contract with the corrected information.
8. Make any necessary edits to the provider contract and click **SAVE**.

   Note: You can only edit the **START DATE** field.

![Contract Edit Example]

9. Confirm that the edit is reflected in the provider contract.

### 8. View Pledge Payments & Generate Invoices

When a North Carolina resident applies for and is accepted into a utility assistance program through NC FAST, the government determines and allocates a 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 as well as the resident who receives assistance. You will then use that pledge payment to generate and submit one invoice to the county. The invoice will be processed by the county and the appropriate amount will be paid by the county to you, the utility provider.

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

1. Log in to the Energy Provider Portal using your NCID.

2. There are multiple different ways to navigate to your pledge payments records. From the PROVIDER HOME PAGE you may select VIEW ALL under the PLEDGE PAYMENTS REQUESTING INVOICES to view all pledge payment records that still do not have an associated invoice for all the accounts you have access to. You may also select VIEW ALL under TOTAL PLEDGED THIS YEAR which will show you all of the pledge payment records across all of the accounts you have access to.

3. From the COUNTY HOME PAGE you may select VIEW ALL under the PLEDGE PAYMENTS REQUESTING INVOICES to view all pledge payment records that still do not have an associated invoice for this one account. You may also select VIEW ALL under TOTAL PLEDGED THIS YEAR which will show you all of the pledge payment records for this one account. Alternatively, you may select the PLEDGE PAYMENT sub-tab to view all the pledge payment records for this one account.
4. Another way to access pledge payments is to select the **PLEDGE PAYMENTS** tab from the navigation bar to view pledge payments for all your accounts.

<table>
<thead>
<tr>
<th>Provider Contract</th>
<th>Vendor Agreement Type</th>
<th>Contract Status</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC0123</td>
<td>Home Energy Supplier Agreement</td>
<td>Active</td>
<td>4/3/2022</td>
</tr>
</tbody>
</table>

5. The default list view on the **PLEDGE PAYMENTS** tab will show the most recent pledge payment records that you have viewed.
6. From the **PLEDGE PAYMENTS** tab, you may select a different list view by clicking the dropdown arrow and choosing a different list view. To make it easy to identify any pledge payments that still do not have a corresponding invoice yet, there is a list view titled, **PLEDGE PAYMENTS REQUESTING INVOICES** that you may use to view only those pledge payments.

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

7. You may also search the list of pledge payment records by using the search bar at the top right of the screen.

**Note:** Any pledge payment that is cancelled via a manual process in NC FAST will not appear in the Energy Provider Portal. If you have further questions about why a pledge payment is no longer visible in the Energy Provider Portal, please contact your county DSS office.

8. 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.

9. Click on the pledge payment record to view the following information:
   a. **Energy Provider:** The provider account who services the individual’s utilities.
   b. **County:** The county where the service is provided.
   c. **Account Number:** The unique identifier of the North Carolina resident’s utility assistance account.
d. **Account Holder’s Name**: The North Carolina resident who is receiving utility assistance.

e. **Application Date**: The date the resident applied for assistance.

f. **Application Reference**: The unique identifier that corresponds to the individual’s application for utility 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, Low-Income Housing Water Assistance Program, 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.

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.

l. **Payment Issue Date**: The date the payment was issued by the county.
10. To create an invoice, first scroll down and verify that there are no existing invoices associated to this pledge payment record, then click the **NEW PROVIDER INVOICE** button on the top right corner of the screen.

**Notes:** When creating invoices, there are several notes to keep in mind:

- You cannot create an invoice on a pledge payment with a payment type of **UNDERPAYMENT**, **OVERPAYMENT**, or **SUPPLEMENT**.

- It is possible for you to generate a new invoice for a resident by selecting **NEW** from the **PROVIDER INVOICES** tab, or from the **PROVIDER INVOICES** section of the **COUNTY HOME PAGE**, however if you generate an invoice through those methods, you will need to manually enter which pledge payment record the invoice will be associated to.
11. In the pop-up window enter the correct information into the fields:

   a. **Account**: The Energy Provider who is servicing the resident’s utilities. This will auto-populate to the appropriate account within the Energy Provider Portal.

   b. **Current Amount Due**: Amount of money currently due for the resident’s utility usage.

   c. **Pledge Payments**: A hyperlink to the pledge payment record that is associated to this invoice record. When you begin to generate the invoice from the pledge payment record, this field will be auto-populated with the associated pledge payment.

   **Note**: Residents apply for assistance on a per-bill basis, meaning that each pledge payment should have only **ONE** invoice associated to it.
d. **Invoice Date:** The billing date from the provider.

e. **Service Address:** The home address where the resident receives utility assistance.

f. **Service City:** The city where the resident receives utility assistance.

g. **Service State:** The state where the resident receives utility assistance (North Carolina).

h. **Service Zip Code:** The zip code where the resident receives utility assistance.

12. Click **SAVE**.

13. A green success banner will appear at the top of the screen, letting you know that the invoice was successfully generated for that pledge payment.
9. Underpayments & Overpayments

If a pledged amount is less than or more than the invoiced amount, you will be able to track the differences via separate pledge payment records generated by county caseworkers.

1. Log in to the Energy Provider Portal using your NCID.

2. Navigate to the PLEDGE PAYMENTS tab.

3. Open the pledge payment record that shows an invoice amount of less than or more than the pledged amount.

4. Note the APPLICATION REFERENCE NUMBER of the resident.

5. Navigate back to the PLEDGE PAYMENTS tab and search for the APPLICATION REFERENCE NUMBER of the resident’s original pledge payment record.

6. You will see each pledge payment associated to that resident’s application. After you’ve submitted the invoice with a different amount than the pledge payment, the
county staff will take corrective action. There will then be a new pledge payment record for that resident, utilizing the same APPLICATION REFERENCE NUMBER.

7. If the original invoice was an underpayment (you received less than the invoice amount) you will see a pledged amount for the difference between the original pledge amount and what you invoiced, as well as a PAYMENT TYPE of UNDERPAYMENT. If the original invoice was an overpayment (you received more than the invoice amount), you will see the pledged amount, and a PAYMENT TYPE of OVERPAYMENT. The pledge amount will still appear as a positive value, but the PAYMENT TYPE of OVERPAYMENT indicates that the money is given from the provider back to the county.
8. No action is required from you on a pledge payment record with a payment type of OVERPAYMENT or UNDERPAYMENT.

10. Locate, Review, & Edit Invoices

In some cases, you may need to locate, review, and edit an invoice for a specific resident.

1. Log in to the Energy Provider Portal using your NCID.

2. Navigate to the PROVIDER INVOICES tab.
3. The default list view will show the most recent invoice records that you have viewed.

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.

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.

   **Note:** You cannot search by current amount due or by customer name. You can search by customer address, zip code, or the invoice record number.

7. Click on the invoice record to review the details of the invoice.

8. To edit the invoice, click on any **PENCIL** icon.
9. Make any necessary edits to the invoice and click **SAVE**.

   **Note**: Do **NOT** generate a second invoice associated to a pledge payment. If there is an error on the invoice, always use the **EDIT** functionality to correct for the error.
10. Confirm that the edits are reflected in the invoice record.

11. Create Additional Provider Accounts With The Same NCID

Utility providers that service multiple counties must have one Energy Provider Portal account for each county, for each category of utility they provide. In other words, a provider that services two counties with one utility will have two accounts, and a provider that services one county with two different utilities must also have two accounts. To create multiple accounts during the enrollment application process, please refer to the SUBMIT A PROVIDER ENROLLMENT APPLICATION portion of this job aid.

If you already have an existing Energy Provider Portal account, you may also create an additional account for another county/utility that you service.
1. Log in to the Energy Provider Portal using your NCID.

2. If you already have multiple accounts, select the **CREATE ACCOUNTS** button from the **PROVIDER HOME PAGE**.

3. If you only have one existing account when you log in, you will select **CREATE NEW PROVIDER ACCOUNTS** from the drop-down menu in the upper right-hand side of the **COUNTY HOME PAGE**.
4. A **CREATE NEW ACCOUNTS** pop-up window will open, prompting you to fill in the enrollment application details for the new provider account.

5. Fill in all the details of the new provider accounts to enroll. Use the scroll bar in the **County** field to locate each serviced county. Select the county name and click the right arrow to choose that county. Repeat this process for each county until you have moved each county you want to have an Energy Provider Portal account for into the right column.

![Create New Accounts](image_url)

**Note:** The details such as Provider/Company Name, Billing Address, or Email Address of the newly created account do not need to match your existing provider account, however your FEIN or SSN will automatically be matched to your existing account.

6. Click **NEXT** to bring up the confirmation screen.

7. Review the county/counties that you’ve selected and click **NEXT**.
8. Click the **HOME** tab and confirm that the newly created account is visible on the **PROVIDER HOME PAGE**.

9. The new provider account will be in **OPEN** status and will need to be submitted along with a vendor contract before being able to generate invoices.
12. Link an Existing Provider Account To Your NCID

Utility providers that service multiple counties or provide multiple categories of utility must have one Energy Provider Portal account for each county/utility combination. If multiple accounts have already been created for your company and you want to consolidate access to your NCID, you have the option to do so for some or all of the accounts with the same FEIN/SSN.

1. Log in to the Energy Provider Portal using your NCID.

2. If you already have multiple accounts, you will see the PROVIDER HOME PAGE, a screen allowing you to select which specific account to operate in. Select the LINK ACCOUNTS button.

3. If you only have access to one account when you log in, you will see the COUNTY HOME PAGE and must select LINK ACCOUNTS from the drop-down menu in the upper right-hand side of the screen.
4. A **LINK NEW PROVIDER ACCOUNT(S)** pop-up window will appear.

5. If there are any existing Energy Provider Portal accounts with the same FEIN or SSN, you can select which other county/utility accounts you want to add to your NCID access. To gain access to those accounts, select the corresponding checkbox next to each account (Name, County Primary Category) that you would like access to. Once you’ve selected all the accounts you want to access, select **NEXT**.
6. Click **NEXT** to add access to the account(s).

7. Click the **HOME** tab to see the **PROVIDER HOME PAGE** and confirm that you now have access to the account.

13. Resolving Errors

There are some instances in which integration errors occur between the Energy Provider Portal and NC FAST.

1. Any time an account field is updated in the Energy Provider Portal, an integration sync occurs which sends the updated information to NC FAST.

2. If the integration is successful, there will be no indication to the user.

3. If the integration is not successful, a pop-up window will inform users of the failure, and instruct you to call the NC FAST Provider Support Center to ensure the change can be properly recorded and synced.
4. Try to conduct the transaction again. If the error persists, contact the NC FAST Provider Support Center.

5. Any value that was changed prior to the sync failure will be automatically reverted back to its original value.

6. All account changes are stored by the system and visible by State Information Support users so that any errors may be tracked and corrected as necessary.

14. Additional Resources & Help

For more information on how to use the Energy Provider Portal, please review the posted training materials at https://www.ncdhhs.gov/divisions/social-services/energy-assistance/energy-provider-portal or 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

<table>
<thead>
<tr>
<th>Date of Change</th>
<th>Major Changes Made</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/10/2021</td>
<td>• Update to process of creating multiple accounts for the same organization and linking multiple accounts to one NCID login</td>
</tr>
</tbody>
</table>
| 6/17/2022      | • Added new Primary Categories (Heating/Cooling and LTNC Heating/Cooling) as well as Fuel Type field  
• Updated process for enrolling multiple accounts  
• Added validations to prevent duplicate accounts  
• Added new fields to Pledge Payment records to indicate payment type, program, and status  
• Auto-close accounts if the Provider Status is Open for 12 months, or if the Provider Contract is expired for 12 months  
• Submit multiple Provider Contracts simultaneously  
• Contracts may be submitted with a start date 30 days in the past  
• Underpayment and Overpayment section added |