

UNDERSTANDING THE EFFRT 2.0 WORKFLOW

The effRT 2.0 application is used to manage projects from the project inception to final payment. The **Application** workflow step is used to collect all information about the project including customer information, premise information, and measures installed. After the project is completed, it is subject to inspection. The **Inspection** workflow step collects results from the inspection. The **Management Review** workflow step is used by the Delivery Team to review the project for accuracy. During Management Review, program administrators will determine if a Technical Review is required. The Management Review also ensures that the latest savings and factor schedules are being referenced for savings calculations. If it is not, a technical review will automatically kick-off. The **Technical Review** workflow step allows engineers to review and update measure information based on review results. Upon completion of the workflow, the project will be released for payment.



FIGURE 1 – EFFRT 2.0 WORKFLOW

The status of the Application workflow step is used to let users know exactly where the project is in the enrollment process. Figure 2 shows the status flow for the Application workflow step. When a new project is submitted to the Delivery Team, it is in Pending Acceptance status. The Delivery Team reviews the project to make sure all required information has been provided. If there is missing information, they will send the project back to the QP by setting the status to Missing Information. After all information has been entered, the project will go through Pre-Approval if necessary. When the project is complete and all information has been entered, the status will be set to Work Complete. The next workflow step will be created according to the workflow in Figure 1.

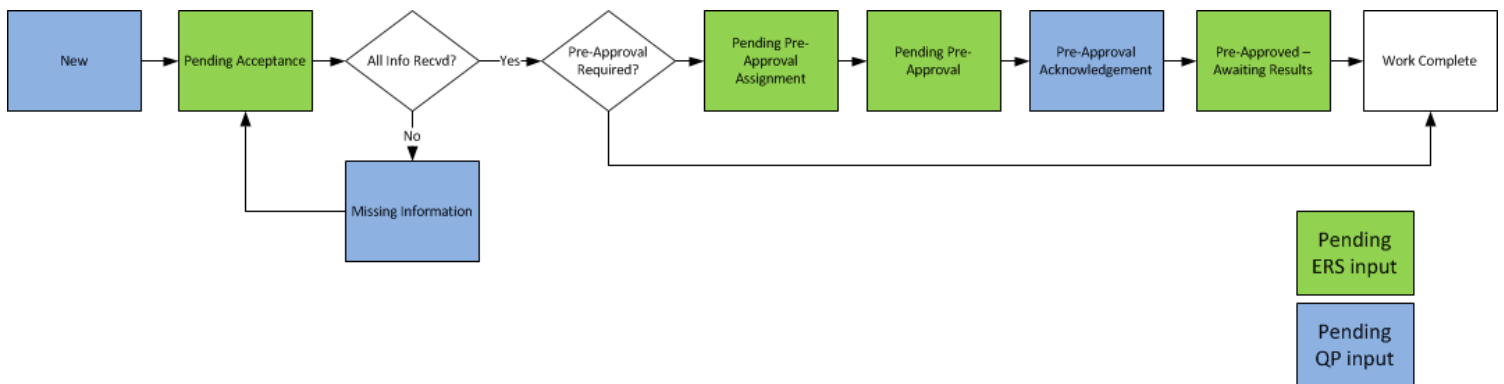


FIGURE 2 – APPLICATION STATUS FLOW

You can view the current status of the project on the To Do List and on the Enrollment Profile.

- 1) Click on the To Do List, menu option on from the Main Menu.

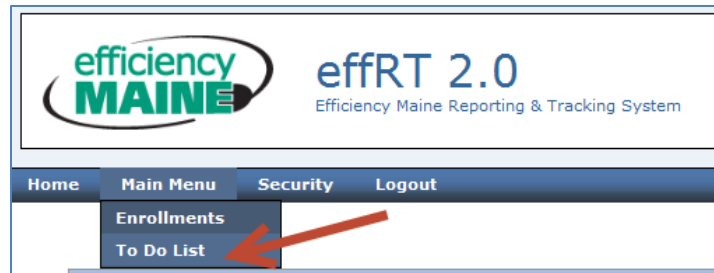


FIGURE 3 - TO DO LIST MENU OPTION

- 2) Enter filter criteria and click Search. The Workflow Step and current status will be displayed in the list. (Note: The workflow step name is a link to bring you to the workflow step screen).

To Do List

Export

To Do Search

Enrollment Number: Customer Name: Tax ID/SSN: Applicant: Last Name: First Name: Reference Number:

Program: Trade Ally: Employee:

Scheduled Date: to Created Date: to

City: ZIP: Workflow Step: Workflow Step Status:

Found more than 1000 records that match your criteria. Please refine the search and try again.

Enroll. #	Program	Customer Name	Tax Id / SSN	Applicant Name	Applicant Address	ZIP	Workflow Step Status Trade Ally	Created Date	Scheduled Date	Scheduled Time	Duration
101408	Prescriptive Lighting Retrofit	SMITH'S	765778899	SMITH, JOHN	400 ELM ST PORTLAND, ME	04001	Inspection Unscheduled / Awaiting Results ERS, Inc	2/19/2013			
101407	Prescriptive Lighting Retrofit	SMITH'S	454544455	SMITH, TOM	202 MAIN ST PORTLAND, ME	04001	Application Pending Acceptance	2/19/2013	2/19/2013		

FIGURE 4 - TO DO LIST

- 3) Click the Enroll # link to bring you to the Enrollment Profile. The Enrollment Profile shows everything that has occurred for the project. The Application workflow step will always be on the top of the Workflow Step list. All other workflow steps will be added to the list as the project progresses through the workflow. If a workflow step has not yet been completed and is pending some action, the current status will be displayed in bold. This lets you know the current status of the project. Using the example below, the project has been selected for inspection but the inspection has not yet been scheduled.

Enrollment Summary

Program
Prescriptive Lighting Retrofit

Enrollment #: 101408
Status: Open

SMITH, JOHN

400 ELM ST
PORTLAND, ME 04001
Ph: (999) 888-8888

Enrollment Savings

kWh: 1768.000000
kW: 0.340000
WinterkW: 0.183600
SummerkW: 0.255000
Therms: 0.000000

Enrollment Profile - Workflow

[View Lead](#)
[Add Workflow](#)
[Cancel Enrollment](#)
[Close](#)

Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date	Total # of Days
Enrollment					
Application	Unassigned	Closed - Work Completed	2/19/2013	2/19/2013	1
Inspection					
Inspection	ERS, Inc	Open - Unscheduled / Awaiting Results	2/19/2013		

Sub Sections

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- [Measures](#)
- [Payment Requests \(0\)](#)
- [Notes\(0\)](#)
- [Documents \(0\)](#)
- [Enrollment Contacts](#)
- [Letters and Emails](#)
- [Trade Allies](#)
- [Loans \(0\)](#)

FIGURE 5 - ENROLLMENT PROFILE – STATUS