



**Energy Finance Solutions
VelocityGO Procedures**

Automatic System Notifications

Procedure #	63.00
Revision #	1.0
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Approved By:	Erica

Role All

Recipient	Criteria	Subject Line	Text
Customer	When Contractor or EFS created application is submitted	Welcome to Slipstream's Energy Finance Solutions	Welcome to Slipstream's Energy Finance Solutions! We received an application that was submitted on your behalf by your contractor, and we are processing the application. Slipstream's Energy Finance Solutions will provide additional information regarding eligibility and notify you of your application status as soon as it is processed.
Customer	Offer is generated	EFS Loan Preapproval Confirmation - [Customer Last Name] - [Loan Number]	Congratulations! Your Slipstream Energy Finance Solutions loan application has been preapproved. Please login to the customer portal to learn about the next steps in the loan process and to upload any required documents in support of your loan application.
Customer	Status changes to "Pending"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with EFS has changed. More information may be needed before EFS can issue a decision regarding your loan request. Please login to the EFS portal and navigate to the To Do List on the Dashboard to see what information is required.
Customer	Status changed to "Approved"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with Slipstream Energy Finance Solutions has changed. Your loan request has received final approval! Please look for an email and follow the instructions provided to sign the document electronically.
Customer	Status changed to "Paid"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with EFS has changed. The loan amount, as indicated in your documents, has been paid in full to your contractor. Please refer to the Goodbye Letter for information regarding the due date of your first loan payment. Thank you for working with Energy Finance Solutions!
Customer	Status changed to "Withdrawn"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with EFS has changed. Your application has been withdrawn. This change may have occurred per your request or may indicate that your loan application has expired. For more information, or if you would like to reactivate your application, please call or email your loan specialist.
Customer	Status changed to "Declined"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with EFS has changed. EFS was unable to approve your loan request. For information regarding the factor(s) that led to this decision, please login to the EFS portal or refer to the Adverse Action letter.
Customer	Status change to "Subsidy Qualified"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your subsidy application with Slipstream Energy Finance Solutions changed to Subsidy Qualified. Please login to the Slipstream portal to see if any additional information is required.

Contractor	When offer is generated	EFS Loan Preapproval Confirmation - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. The loan application has been preapproved. Please login to the EFS website to learn about the next steps in the loan process and to upload any required documents to receive final approval.
Contractor	Status changes to "Pending"	EFS Loan Preapproval Confirmation - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. This application requires further review by Slipstream Energy Finance Solutions staff, which will be completed within one business day from the date that the customer submitted the application. You will receive an email when the status of the application is updated. For more information, please login to your website. Thank you for your patience and we will be in touch soon.
Contractor	Status changed to "Approved"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. The loan request has received final approval! Your customer has opted to use electronic signature and will receive a separate email from DocuSign with instructions for signing the document electronically. You can view the status of the documents on the loan Document Manager on the Slipstream Energy Finance Solutions website. Please login, click on the request, and then click on Documents.
Contractor	Status changed to "Loan Docs Accepted"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. Loan documents have been received and accepted. You may schedule the work in accordance with program guidelines. Please have the installation completed and all final documentation returned to EFS at least 10 business days prior to the expiration date of the loan.
Contractor	Payment Type field on Disbursement changes to "Advance Payment"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. An Advance Payment has been made to you. Please login to the EFS website and navigate to the loan for more details. Thank you for working with Energy Finance Solutions!
Contractor	Loan status changed to "Withdrawn"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. The loan application has been withdrawn. This change may have occurred per customer request or may indicate that the loan application has expired. For more information, please call or email the assigned loan specialist.
Contractor	Loan status changed to "Declined"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. Slipstream Energy Finance Solutions was unable to approve the loan request. For more information, please call or email the assigned loan specialist.
Contractor	Loan status changed to "Paid"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer has changed. The loan amount, as indicated in the documents, has been paid in full to you. Please login to the Slipstream Energy Finance Solutions website and navigate to the loan for more details. Thank you for working with Slipstream Energy Finance Solutions!
Contractor	Status change to "Subsidy Qualified"	Status Change for Slipstream Energy Finance Solutions Application - [Customer Last Name] - [Loan Number]	The status of the subsidy application for your customer [CUSTOMER FIRST AND LAST NAME], has changed to [Subsidy Status]. Please login to the Slipstream portal to see if any additional information is required.