

1. **Create Project in P3** (create customer, premise and schedule work)
 - a. Single Family Projects move to work completion pending
 - b. Multi-Family Projects of 19 or fewer premises move to work completion pending
 - c. Multi-Family Projects of 20 or more premises must wait for Pre-Approval
 - d. Income Qualified (IQ) Projects: select form of verification eligibility, move to work completion pending. Multi-Family Projects of 20 or more premises must wait for Pre-Approval
2. **Project Assessment** (Evaluate measures and discuss with Customer)
3. **Combustion Safety Form** (Required if gas appliances are present)
4. **Hazardous Condition Form** (if hazards or pre-existing conditions are present)
5. **Residential Participant Agreement**
Signed before work begins by Project Sponsor and Customer (and subcontractor, if applicable)
6. **Complete Field Notes**
If direct install measures were performed, the quantity must be recorded in the field notes.
7. **Pre & Post Installation Pictures**
 - a. Air Infiltration
Pictures capturing the scope/type of retrofit implemented along with blower door test readings showing pre- and post-retrofit condition of the treated spot such as sealing penetrations and air leakage areas are required
 - b. Ceiling Insulation
A picture showing the entire attic floor and close-up pictures of a ruler that shows the measurement of the depth of the insulation, and an insulation certificate affixed near the attic entrance.
 - c. Duct Sealing
Pre-and post-pictures of the work performed such as sealing penetrations of the duct leakage areas and duct blaster readings are required.
8. **All Bills Paid Affidavit** (if a subcontractor was used)
9. **Residential Participant Agreement**
Signed upon completion of work by Project Sponsor and Customer (and subcontractor, if applicable)
10. **Residential Weatherization Report**
The technician must check off the appropriate boxes in each measure category and fill out any corresponding blanks. The customer must sign an acknowledgment that they received a copy and that they understand what work was completed on their home.
11. **Upload forms and Materials in P3**
 - Residential Participant Agreement (*Uploaded Files*)
 - Field Notes (*Premise*)
 - Before and After pictures (*Project*)
 - Hazardous Condition Form, if applicable (*Premise*)
 - Combustion Safety Form, if applicable (*Premise*)
 - Invoice (*Premise*)
 - Residential Weatherization Report (*Premise*)
 - Pre and Post (*Measure*)
12. **Final Approval** by a Program representative in P3 (upon savings verification)
13. **Payment** (upon Final Approval)