CEIP Project Administration Process

Pre-Qualification

Participant

This process assumes that:
- Alberta Municipalities will take on the bulk of the administrative work for the Program. If the municipality chooses, they may take on some of the tasks currently identified as administrator tasks; to be discussed during program design.
- The municipality has advanced a lump sum funds to Alberta Municipalities with which to pay contractors; Alberta Municipalities will hold these funds in a retainer account and pay contractors, as approved by the municipality.
- All agreements will be signed digitally via Adobe Sign. The CEI Agreement signature process will change if the Municipality opts to sign the Agreement in person.

Submit CEIP Pre-Qualification Form on CEIP website

'Declined' Email Notification

*Pre-Qualification approvals are valid for **three months** from the date of receipt of this email

*This step may not be needed if the Participant has an existing eligible EnerGuide Home Evaluation

'Approved' email notification with next steps*

Schedule and complete an EnerGuide Home Evaluation*

Select upgrades and get quotes from contractor(s)

Alberta Municipalities

Review for completeness and verify participant and property eligibility

Review eligibility criteria

Ineligible

Eligible

Send to Municipality for review

Receive rejection notification from Municipality and notify Participant

Receive approval notification from Municipality and notify Participant

Municipality

*Assess Participant for good-standing with property tax department and verify bylaw and other eligibility conditions met. This process should take no longer than **three days**.

Review eligibility criteria*

Ineligible

Send rejection notification to Alberta Municipalities

Eligible

Send approval notification to Alberta Municipalities

In years one through four, costs for administering the residential Program may be covered by FCM grant funds. In years five onwards, for the commercial stream, and for those without FCM funding, the Municipality and Alberta Municipalities will discuss how administration costs will be covered. Costs that may not be able to be recovered through the Administration Fee (this depends on the % split of the Administration Fee between Alberta Municipalities and the Municipality):
- Confirming Participant and Property eligibility
- Facilitation of the signing of the initial and Amended CEI Agreements (including creation of the Application and Completion Summaries)
- Disbursement of Municipal funds (paying contractors and property owners)
- Post-upgrade verification site visits
- Program marketing

Project Application

*Not captured in this process is the Change Order process. Should there be a material change (cost, equipment, or timeline change) during the installation stage, the participant must request a Change Order from Alberta Municipalities. The completed Change Order must be approved by the Municipality and Alberta Municipalities to confirm financing eligibility.

Participant

Submit CEIP Project Application Form and supporting documents

All property owners sign CEI Agreement. Property Owner(s) and Contractor sign the Project Agreement.

Send signed Agreements to Alberta Municipalities

Alberta Municipalities

Review for completeness and eligibility

Declined

Notify Participant that project does not meet eligibility criteria and is declined

Approved

Notify Municipality of Project Approval and provide Application Summary

Send approval notice, CEI Agreement, and Project Agreement to Participant

Walk-through CEI Agreement with Participant(s)

Sign Project Agreement and forward CEI Agreement to Municipality for signing

Municipality

Review Application Summary and confirm Approval*

Declined

Notify Alberta Municipalities of rejection

Approved

*Includes confirmation the annual CEI Tax will not exceed annual municipal tax amount. The review of the Application Summary and preparation/ sending of the CEI Agreement should take no longer than **three days**.

Draft CEI Agreement based on information from Application Summary*

Send CEI Agreement to Alberta Municipalities

Sign CEI Agreement, send copy to & notify Alberta Municipalities*

*This process should take no longer than **three days**.

Project Installation

Participant

Deposit requested by Contractor?

No

Proceed with upgrade installation with Qualified Contractor*

Yes

Send copy of executed CEI Agreement and Project Agreement and notify Participant and Contractor(s) of ability to proceed with upgrades*

*Projects must be completed within **six months** of receipt of this 'Installation Authorization Notice'

Pay Contractor and send confirmation of payment to Participant & Qualified Contractor

Documents for approval (pre-qualification, application, upgrade completion) and Request for Payments (RFPs) can be sent to the Municipality weekly, on a specified day, or ad hoc.

Project Completion

Participant

Submit Upgrade Completion Form and supporting documents when upgrades are complete

Receive confirmation of payment to Contractor

All property owners sign Amended CEI Agreement

Send signed Amended CEI Agreement to Alberta Municipalities

Receive copy of executed Amended CEI Agreement, wait for charge to appear on property taxes

Alberta Municipalities

Review Completion Form for completeness and upgrade eligibility (with site visits as necessary)

Declined

Notify Participant of ineligible upgrades

Approved

Send confirmation of upgrade completion and supporting documents to Municipality

Send confirmation of payment to Participant & Qualified Contractor

Pay Contractor, using municipality funds in retainer account, ensuring compliance with Prompt Payment Act

Additional upgrade completions to be submitted or project payments to be made?

Yes

No

Prepare and send Project Completion Summary to Municipality

Send Amended CEI Agreement to Participant for signature

Forward Amended CEI Agreement to Municipality for signing

Send copy of executed Amended CEI Agreement to Participant, notify Participant that Municipality will add CEI Tax to their property tax roll and close file

Invoice Municipality for Admin Fees (Alberta Municipalities will invoice monthly for Admin Fee and additional services)

Municipality

Review upgrade completion and supporting documents*

Declined

*Review and submitting approval should take no longer than **three days**.

Approved

Send approval of upgrade completion to Alberta Municipalities, approving amount to be paid to Contractor*

Review Completion Summary, prepare Amended CEI Agreement (with rebates deducted, if applicable) and send to Alberta Municipalities*

*This process should take no longer than **three days**.

Sign Amended CEI Agreement, send copy to & notifies Alberta Municipalities

Apply CEI Tax to Participant's property tax roll*

*The timing of when the Tax is applied will depend on the Municipality's internal processes

Pay invoice*

*All invoices should be paid within **30 days** of issue.