



Energy Smart Loan Process Checklist

Snohomish County and Puget Sound Cooperative Credit Union (PSSCU) have partnered to offer an Energy Smart Loan Program to help Snohomish County homeowners make their homes more energy-efficient and reduce their utility bills.

Use this form to track your progress, as you move from Energy Smart Loan applicant to Energy Smart homeowner.

	Complete?	Date	Loan Process Step
Loan Approval	<input type="checkbox"/>	_/_/___	Homeowner submits completed Energy Smart Loan application to PSSCU
	<input type="checkbox"/>	_/_/___	Homeowner is contacted by PSSCU with loan approval, denial, or request for more info
	<input type="checkbox"/>	_/_/___	If approved, loan and membership info is sent via mail, or electronically through DocuSign
Project Scope prepared for work	<input type="checkbox"/>	_/_/___	Homeowner returns signed project documents with a copy of ID(s) and \$5.00 required deposit
	<input type="checkbox"/>	_/_/___	Contractor requests deposit for project, if needed
	<input type="checkbox"/>	_/_/___	Homeowner authorizes release of funds to allow deposit from PSSCU to contractor, if applicable
Energy Smart Work	<input type="checkbox"/>	_/_/___	Contractor completes project work
Project Closeout	<input type="checkbox"/>	_/_/___	Contractor sends final invoice and completed Project Completion Form to PSSCU
	<input type="checkbox"/>	_/_/___	Homeowner authorizes final Release of Funds
	<input type="checkbox"/>	_/_/___	Final payment mailed to contractor from PSSCU