



FPL DSM Contractor Portal

User Guide to Become a Participating Independent Contractor (PIC)

– Application Submittal –



DSM Contractor Portal User Guide for PICs

Terms and Conditions

This user guide is the sole property of Florida Power & Light Company (“FPL”) and is being provided to you as a potential candidate as a Participating Independent Contractor subject to the terms and conditions established by the **Program Standards** and **Demand Side Management Program Contract**, as may be amended or revised from time to time.

Florida Power & Light Company is providing this User Guide to you without obligation to do so, and no consideration has been requested by FPL or received from you in exchange for this User Guide. THIS USER GUIDE MAY BE USED BY YOU ONLY FOR THE PURPOSE OF ACCESSING AND INTERACTING WITH FPL’S DSM CONTRACTOR PORTAL.

You may use this User Guide in either electronic form downloaded from the fpl.com website or a hardcopy that you print and retain for your individual use. However, you may not distribute copies of this User Guide, regardless of medium, without the express written consent of FPL. Florida Power & Light Company reserves the right to change, modify, or discontinue either or both the FPL DSM Contractor Portal and this User Guide at any time, with or without notice to you, and for any reason as deemed appropriate by FPL in its sole discretion. Screenshots, samples, or other images contained in this User Guide are intended to be demonstrative only and may not reflect the screens, information, or sequences actually displayed by the FPL DSM Contractor Portal at any given time.

Although this User Guide has been carefully prepared and reviewed for the accuracy of the information contained herein, THE INFORMATION CONTAINED HEREIN AND YOUR ACCESS TO THE DSM CONTRACTOR PORTAL ARE BOTH PROVIDED “AS IS” AND FPL MAKES NO REPRESENTATIONS AND OFFERS NO WARRANTIES, EXPRESS OR IMPLIED, INCLUDING THOSE OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, AS TO (i) THE ACCURACY OF THE INFORMATION CONTAINED HEREIN; (ii) THE SUITABILITY OF THIS USER GUIDE FOR ITS INTENDED PURPOSE; (iii) THE FUNCTIONALITY OR AVAILABILITY OF THE FPL DSM CONTRACTOR PORTAL; (iv) SPECIFIC HARDWARE OR SOFTWARE CONFIGURATIONS THAT MAY BE REQUIRED TO FULLY ACCESS OR UTILIZE THE FPL PIC PORTAL; OR (v) DAMAGE, LOSS, OR OTHER PERILS THAT MAY RESULT FROM YOUR USE, MISUSE, OR FAILURE TO USE THE FPL DSM CONTRACTOR PORTAL.

Table of Contents

Introduction

Overview	4
Getting Started	5

Onboarding

Application Submittal	6
Next Steps	13
Emails	13

DSM Contractor Portal – User Guide for Onboarding

Overview

To become a Participating Independent Contractor (PIC) for any of FPL’s Demand Side Management (DSM) programs, you will be required to review and meet the program’s specific standards and requirements, as well as complete any orientations, if required by the program.

This user guide contains instructions for completing the application to **Become a PIC** via the FPL DSM Contractor Portal located on FPL.com.

The FPL DSM Contractor Portal, powered by Salesforce, is a secure collection of information and applications.

DSM Contractor Portal – User Guide for Onboarding

Getting Started

Prior to starting the onboarding process, we recommend you have the following readily available:

Required Documents and Information

Understanding of which DSM program(s) your company will support.

Note: To learn about the DSM programs, please refer to our Program Standards.

- Tax ID or SSN
 - Insurance details (carrier name, policy number, and expiration date)
 - Business and mailing address
 - Contact information (full name, phone number, email)
 - List of counties serviced by your company
- New Vendor Packet (which includes W-9, FEDI form, Questionnaire)
 - **Note:** If FEDI, a void check will be required.
 - Contract(s) for the program(s) registering for
 - License document(s)
 - Certificate of Liability Insurance (Minimum General Aggregate of \$1M)
 - **Note:**
 - The Certificate Holder Address must be included in the Certificate of Liability Insurance.
 - Example:

CERTIFICATE HOLDER

FPL
DSM Program Contracts Administrator
7201 Cypress Road
Plantation, FL 33317

Important: If supporting multiple DSM programs, ensure insurance details and documents are obtained for each.

DSM Contractor Portal – User Guide for Onboarding

Application Submittal

Directions: Use the steps below to initiate and complete the application to become an FPL PIC.

Step	Action												
1	<ul style="list-style-type: none"> Complete both the Contractor Details and Insurance Details section Refer to the table below for details on what to complete Select Next once required fields are completed <div data-bbox="432 494 1058 1265" style="text-align: center;"> </div>												
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Section</th> <th colspan="2">Items to enter</th> </tr> </thead> <tbody> <tr> <td data-bbox="142 1323 475 1642">A. Contractor Details</td> <td data-bbox="475 1323 939 1642"> <ul style="list-style-type: none"> Tax ID or SSN Contractor Name Segment – Residential, Business, or Both DBA Name – if applicable Company Website – if applicable Business Email </td> <td data-bbox="939 1323 1409 1642"> <ul style="list-style-type: none"> Business Phone Business Address Mailing PO Box Address – if same as business address, re-enter the information <p>Note: When searching for an address, do not use “#” for apartments or suites.</p> </td> </tr> <tr> <td data-bbox="142 1642 475 1767">B. Insurance Details</td> <td colspan="2" data-bbox="475 1642 1409 1767"> <ul style="list-style-type: none"> Insurance Carrier Name Policy Number Expiration Date </td> </tr> <tr> <td data-bbox="142 1767 475 1823">C. CAPTCHA</td> <td colspan="2" data-bbox="475 1767 1409 1823">Confirm you are not a robot by selecting the check box</td> </tr> </tbody> </table>	Section	Items to enter		A. Contractor Details	<ul style="list-style-type: none"> Tax ID or SSN Contractor Name Segment – Residential, Business, or Both DBA Name – if applicable Company Website – if applicable Business Email 	<ul style="list-style-type: none"> Business Phone Business Address Mailing PO Box Address – if same as business address, re-enter the information <p>Note: When searching for an address, do not use “#” for apartments or suites.</p>	B. Insurance Details	<ul style="list-style-type: none"> Insurance Carrier Name Policy Number Expiration Date 		C. CAPTCHA	Confirm you are not a robot by selecting the check box	
Section	Items to enter												
A. Contractor Details	<ul style="list-style-type: none"> Tax ID or SSN Contractor Name Segment – Residential, Business, or Both DBA Name – if applicable Company Website – if applicable Business Email 	<ul style="list-style-type: none"> Business Phone Business Address Mailing PO Box Address – if same as business address, re-enter the information <p>Note: When searching for an address, do not use “#” for apartments or suites.</p>											
B. Insurance Details	<ul style="list-style-type: none"> Insurance Carrier Name Policy Number Expiration Date 												
C. CAPTCHA	Confirm you are not a robot by selecting the check box												

DSM Contractor Portal – User Guide for Onboarding

Step	Action
------	--------

- Complete the **Contact Information** section
- Refer to the table below for details on what to complete
- Select **Next** once details are entered and saved

Contractor Onboarding EXIT

Step 2 / 5: Contact Information

Please add contact details for up to three representatives. Details provided below shall be used to set up your user in the DSM Contractor Portal once you have been approved.

A *First Name *Last Name

*Email *Phone Number

*Role
 Select an Option
 Rebate Processing Clerk
 Office Manager
 Principal Owner

B Add another contact

2

Section	Items to enter
A. Portal User Contact Details	<ul style="list-style-type: none"> • Contact details (all field are required) • For the Role field, select from: <ul style="list-style-type: none"> • Principal Owner • Office Manager • Rebate Processing Clerk <p>Note: Email provided within the Portal User Contact section will be used to set up the log-in credentials in the FPL DSM Contractor Portal once the application has been approved.</p>
B. Add another contact	If applicable, click the plus sign to open the <i>Contact Details fields</i> to add additional contacts

Important:

- The Principal Owner role must be associated to a contact before proceeding.
- Contact details can be added for up to three representatives.

DSM Contractor Portal – User Guide for Onboarding

Step	Action
------	--------

- Complete the **License Details** and **Program Selection** section
 - Refer to the table below for details on what to complete
 - Select **Next** once details are entered and saved
- Important:** If supporting multiple programs, details must be added one at a time.

Contractor Onboarding EXIT

Step 3 of 5: License Details and Program Selection

Please fill out your License details and select the residential programs you had liked to be considered for as part of our Participating Independent Contractor Program.

A *License Type ▼

*License Number *Expiration Date 📅

B *Segment ▼ *Program Type Residential HVAC ▼

C Product Brands

- Amana
- American Standard
- Arcoaire
- Armstrong AC
- Bard
- Bryant
- Carrier

D + Add another program

BACK
NEXT

3

Section	Items to enter
A. License Details	License details for the program you would like to be considered for
B. Program Selection fields	<ul style="list-style-type: none"> • Segment • Program Type <p>Note: Selecting the Residential HVAC program will enable the <i>Products Brands</i> section.</p>
C. Product Brands	<ul style="list-style-type: none"> • Only applicable for the Residential HVAC Program • Select all brands your company supports/offers
D. Add another program	If applicable, click the plus sign to enter details for any additional programs you would like to be considered for

DSM Contractor Portal – User Guide for Onboarding

Step	Action
------	--------

- Complete the **Service Preferences** section
- Refer to the table below for details on what to complete
- Select **Next** once details are selected

4

Section	Items to select
A. Counties Served	Select counties serviced by your company
B. Languages	Select all languages supported by your company
C. Hours of Service	Select Yes or No to indicate if your company will be available 24x7

DSM Contractor Portal – User Guide for Onboarding

Step

Action

- Review the **Summary** section
- Select **Submit** once details are carefully reviewed

Note: If needed, select the **Edit** button within the applicable section to modify any details.

5

Contractor Onboarding EXIT

Step 5 / 5: Review and Submit

Please review the details provided and submit to be considered for our Participating Independent Contractor program.

Contractor Details Edit

Tax ID or SSN TaxID

Tax ID or SSN Number [Redacted]

Contractor Name [Redacted]

Segment Residential

DBA Name

Business Phone 4076212114

Business Email [Redacted]@gmail.com

Company Website

Business Address [Redacted]
TX, Garland 75042

Mailing/PO Box Address [Redacted]
TX, Garland 75042

Insurance Carrier Name Best Insurance

Insurance Policy Number [Redacted]

Insurance Expiration Date 2023-08-12

Contact Information Edit

Contact Name [Redacted]

Email [Redacted]@gmail.com

Phone Number [Redacted]

Role Office Manager

Contact Name [Redacted]

Email [Redacted]@gmail.com

Phone Number [Redacted]

Role Principal Owner

Service Preferences Edit

Counties
 Bay County
 Bradford County
 Broward County
 Charlotte County
 Jackson County

Language
 Spanish
 Creole
 English

24/7 Service Yes

License & Program Selection Edit

License Type Occupational

License Number [Redacted]

License Expiration Date 2023-06-23

Segment Residential

Program Type Residential HVAC

BACK
SUBMIT

DSM Contractor Portal – User Guide for Onboarding

Step	Action
------	--------

- Complete the **Onboarding Documents** section
- Refer to the table below for details on what to complete
- Select **Submit** once the required documents are uploaded


6

Section	Items to upload
A. Required Documents	Click into each box to upload the required document Reminder: The Certificate Holder Address must be included in the Insurance Document.
B. Upload Files	<ul style="list-style-type: none"> • Displays as file is being uploaded • Will confirm whether the file was successfully updated or not
C. Other Documents	Additional documents can be uploaded if needed

Important:

- Required documents are identified with a red asterisk.
- File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.
- If supporting multiple programs, group into one attachment by section.

DSM Contractor Portal – User Guide for Onboarding

Step	Action
7	<p>Review the confirmation message and record/save the application request number</p> <p>Important: The request number will be required to check the status of the application.</p> <div data-bbox="235 347 1292 743" style="border: 1px solid #ccc; padding: 20px; text-align: center;"><p> You Have Successfully Completed Onboarding</p><p>Thank you for submitting your request to participate in FPL's DSM Rebate Program. Your "DSM Contractor" application request number is . You can check the status of your application below. Bookmark the page so you can come back periodically.</p><p>CHECK STATUS</p></div>

DSM Contractor Portal – User Guide for Onboarding

Next Steps

- The application will be reviewed by the **FPL Program Specialist** and an email will be provided either confirming access to the FPL DSM Contractor Portal or requesting additional information.
- Access the **Application Status** page within the FPL DSM Contractor Portal to check the status of your application.

Example of Emails

Below are examples of the emails you may receive.

