



FPL DSM Contractor Portal

User Guide for Participating Independent Contractors (PICs)



DSM Contractor Portal User Guide for PICs

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DSM Contractor Portal – User Guide for PICs

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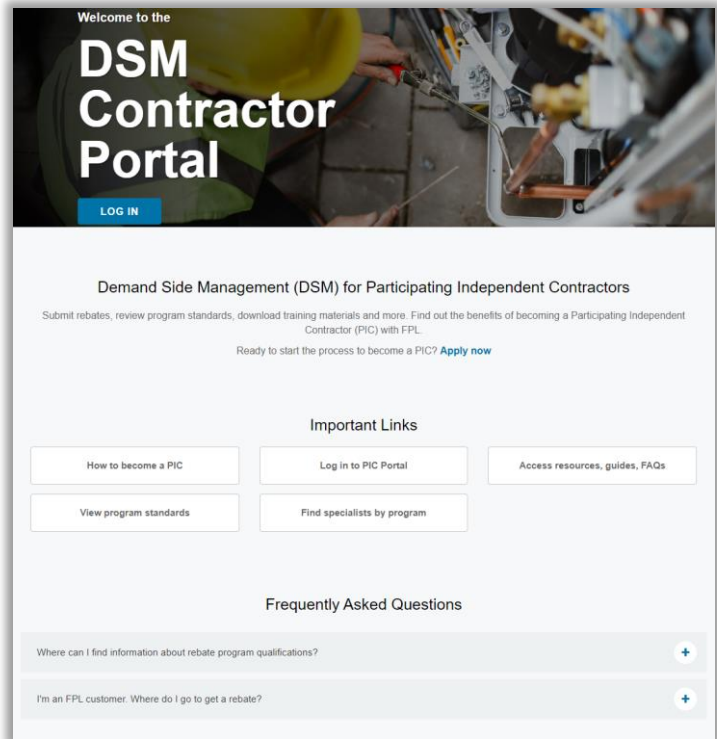
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Overview

This user guide has been prepared by Florida Power & Light Company exclusively for use by its Participating Independent Contractors (PICs).

It contains instructions for accessing and using the DSM Contractor Portal via www.fpl.com to:

- Submit a New Rebate Request
- View the Status of a Submitted Request
- Request Help & Support
- + more



PICs are required to process their rebate request online, using the FPL DSM Contractor Portal. The DSM Contractor Portal, powered by Salesforce, is a secure collection of information and applications.

Submitting rebate requests via the DSM Contractor Portal will provide the following benefits:

- Reduce paperwork errors.
- Ability to view rebates requests in real-time.
- Access your electronic records of rebate requests submitted for the current year and previous two years.

Reminder: Per the Demand Side Management Contract, PICs are required to maintain original documents for a period of two (2) years from the date the work was installed.

Important: An email will be sent to you with a link to the **FPL DSM Contractor Portal** for login. Additionally, a separate email will be sent with your log-in credentials.

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Getting Started

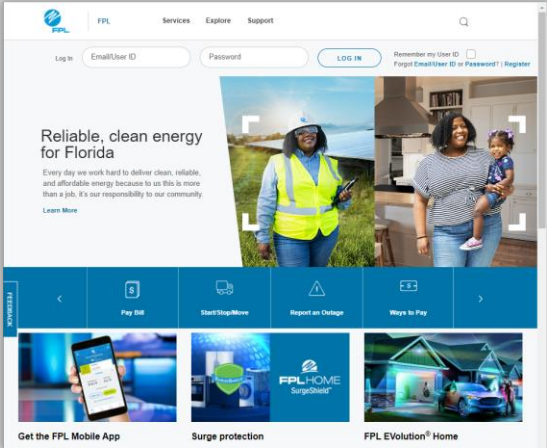
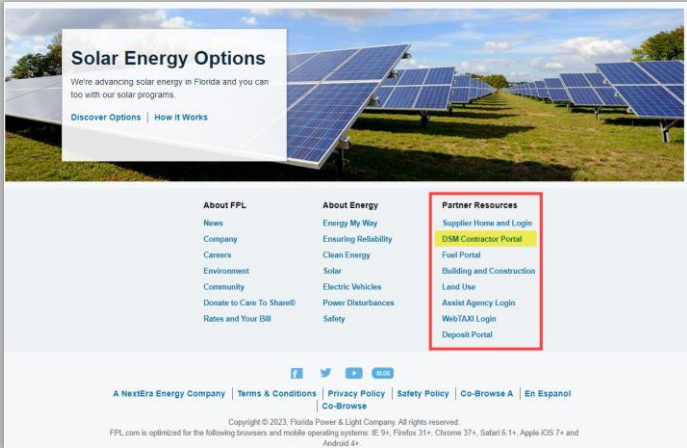
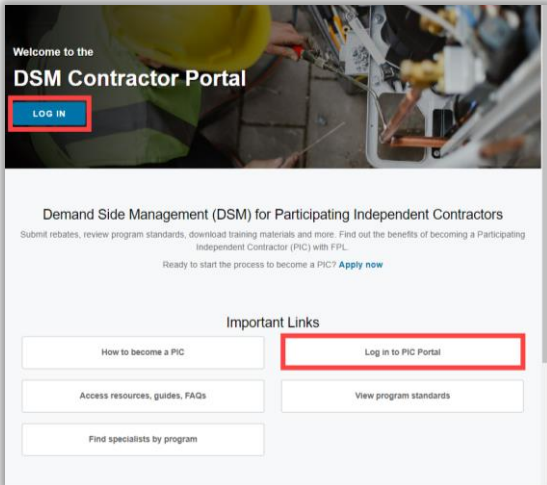
The table below provides an overview of the type of request PICs will be able to complete via the **FPL DSM Contractor Portal**.

Request Type	Description
New Rebate Request	Allows the user to initiate a rebate request for the various DSM programs.
View the Status of a Submitted Rebate	Allows the user to check on the status of a submitted rebate request.
Request for Help & Support	Allows the user to submit profile updates such as: <ul style="list-style-type: none">• Add/Update Insurance Information• Add/Update License Information• Business Address Change• Company Information Change• Update County Information• Update Contact Details• Add/Update Payment Method• Add an Additional Location

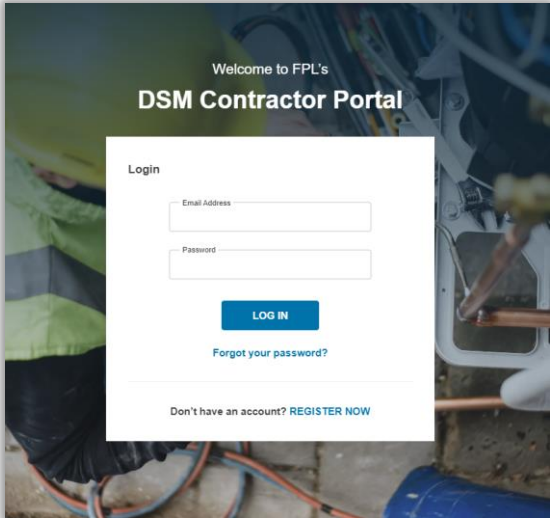
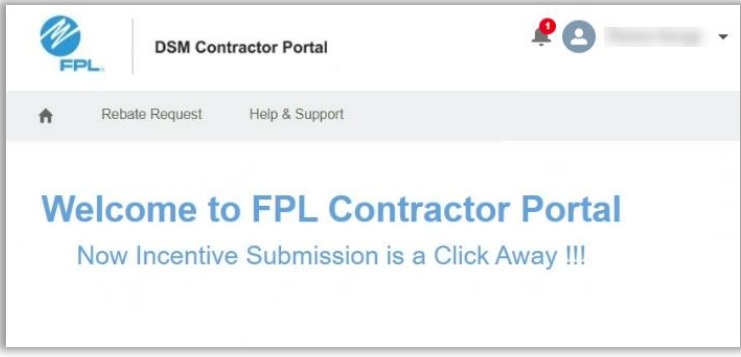
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Accessing the DSM Contractor Portal

Directions: Use the steps below to access the DSM Contractor Portal.

Step	Action	Action
1	Access the www.fpl.com	
2	<ul style="list-style-type: none"> • Scroll down to the bottom of the website and locate Partner Resources • Click “DSM Contractor Portal” 	
3	<p>From the DSM Contractor Portal page, select the Log in button within the welcome banner/image</p> <p>Note: Portal can <i>also</i> be accessed by selecting into the “Log in to PIC Portal” link located within the Important Links section.</p>	

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Step	Action
4	<p>From the DSM Contractor Portal,</p> <ul style="list-style-type: none">• Enter your log in credentials:<ul style="list-style-type: none">• Email Address• Password• Click Log In 
5	<p>The DSM Contractor Portal will display</p> 

Note:

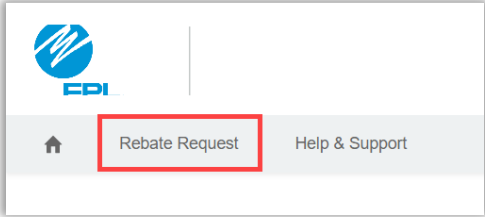
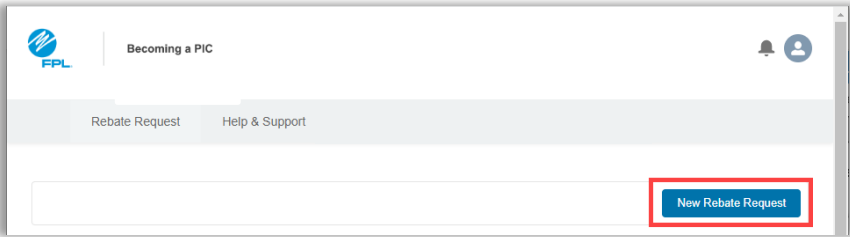
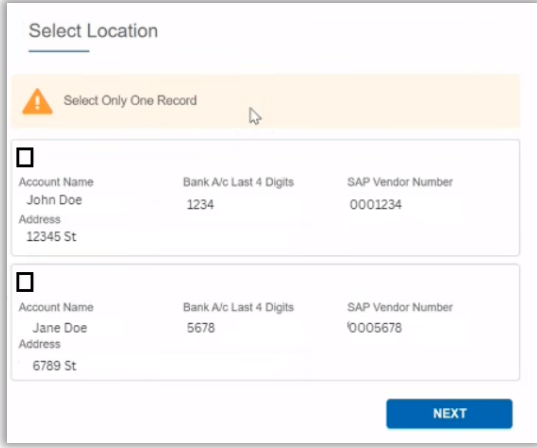
- For password reset select the “Forgot your password” link and follow prompting.
- If you are not a registered PIC, refer to the [Become a PIC Portal user guide](#).

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Initiate New Rebate Request

Directions: Use the steps below to initiate a new rebate request via the FPL DSM Contractor Portal.

Important: Ensure all required documents are obtained prior to initiating the rebate request.

Step	Action					
1	<p>Select Rebate Request from the grey toolbar</p> 					
2	<p>Click the New Request Rebate button</p> 					
3	<p>If applicable, select your location by selecting the relevant checkbox then click on the Next button to continue</p> <p>Important: This step will only appear for PIC's with multiple locations.</p> 					
4	<p>Select the link from the table to obtain required steps based on the program the rebate is being submitted for:</p> <table border="1" data-bbox="865 1512 1389 1804"> <thead> <tr> <th>Program Name</th> </tr> </thead> <tbody> <tr> <td>Residential Ceiling Insulation</td> </tr> <tr> <td>Residential HVAC</td> </tr> <tr> <td>Low Income</td> </tr> <tr> <td>Low Income – Power to Save</td> </tr> </tbody> </table>	Program Name	Residential Ceiling Insulation	Residential HVAC	Low Income	Low Income – Power to Save
Program Name						
Residential Ceiling Insulation						
Residential HVAC						
Low Income						
Low Income – Power to Save						

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Residential Ceiling Insulation (RCI) Rebate Request

Directions: Use the steps below to submit a new rebate request for the RCI Program.

Step	Action														
1	<ul style="list-style-type: none"> Complete the Portfolio and Program section Refer to the table below for details on what to complete Select Next <div data-bbox="468 426 1296 819" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p>Portfolio and Program</p> <p>A * Programs <input type="text" value="Residential Ceiling Insulation"/> D * Bill Account Number <input type="text" value=""/></p> <p>B * Install Date <input type="text" value="04-03-2023"/> E * Watt Saver Certificate Number <input type="text" value=""/></p> <p>C * Do you have WattSaver Number? <input checked="" type="radio"/> Yes <input type="radio"/> No F * Zip <input type="text" value="33145"/></p> <p style="text-align: right;">NEXT</p> </div> <table border="1" data-bbox="135 830 1399 1497"> <thead> <tr> <th>Section</th> <th>Details to enter</th> </tr> </thead> <tbody> <tr> <td>A. Program</td> <td>Select the applicable program (e.g., Residential Ceiling Insulation)</td> </tr> <tr> <td>B. Install Date</td> <td>Enter the installation date</td> </tr> <tr> <td>C. Do you have WattSaver Number</td> <td>Allows user to enter a WattSaver number if applicable Note: If No is selected, the option to “Download RCI Rebate Certificate” will display.</td> </tr> <tr> <td>D. Bill Account Number</td> <td>Enter the 10-digit bill account number (include any leading zero's)</td> </tr> <tr> <td>E. Watt Saver Certificate Number</td> <td>Field is displayed if Yes, was selected for having the WattSaver Number Important: When entering a WattSaver number, ensure you are entering the whole number including the preceding zeros.</td> </tr> <tr> <td>F. Zip</td> <td>Enter the zip code for the bill account Note: Field is displayed if No, was selected for having the WattSaver Number.</td> </tr> </tbody> </table>	Section	Details to enter	A. Program	Select the applicable program (e.g., Residential Ceiling Insulation)	B. Install Date	Enter the installation date	C. Do you have WattSaver Number	Allows user to enter a WattSaver number if applicable Note: If No is selected, the option to “Download RCI Rebate Certificate” will display.	D. Bill Account Number	Enter the 10-digit bill account number (include any leading zero's)	E. Watt Saver Certificate Number	Field is displayed if Yes, was selected for having the WattSaver Number Important: When entering a WattSaver number, ensure you are entering the whole number including the preceding zeros.	F. Zip	Enter the zip code for the bill account Note: Field is displayed if No, was selected for having the WattSaver Number.
Section	Details to enter														
A. Program	Select the applicable program (e.g., Residential Ceiling Insulation)														
B. Install Date	Enter the installation date														
C. Do you have WattSaver Number	Allows user to enter a WattSaver number if applicable Note: If No is selected, the option to “Download RCI Rebate Certificate” will display.														
D. Bill Account Number	Enter the 10-digit bill account number (include any leading zero's)														
E. Watt Saver Certificate Number	Field is displayed if Yes, was selected for having the WattSaver Number Important: When entering a WattSaver number, ensure you are entering the whole number including the preceding zeros.														
F. Zip	Enter the zip code for the bill account Note: Field is displayed if No, was selected for having the WattSaver Number.														
2	<ul style="list-style-type: none"> Review the Checklist step Select Next <div data-bbox="668 1532 1339 1821" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p>Checklist</p> <p>You have selected the RCI program, to submit a rebate you will need to upload the following documents:</p> <ul style="list-style-type: none"> Pre - insulation level picture with Ruler Post - insulation level picture with Ruler Rebate form Photo of address of the home (house #) <p>For more details please visit https://www.fpl.com/partner/contractor.html</p> <p style="text-align: right;">PREVIOUS NEXT</p> </div>														

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Step	Action
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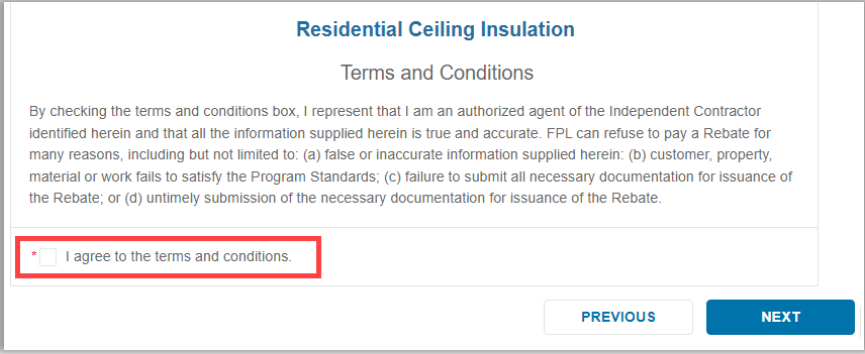
- | | |
|---|--|
| 3 | <ul style="list-style-type: none"> Review the Customer Information section Ensure details are correct Select Next |
|---|--|

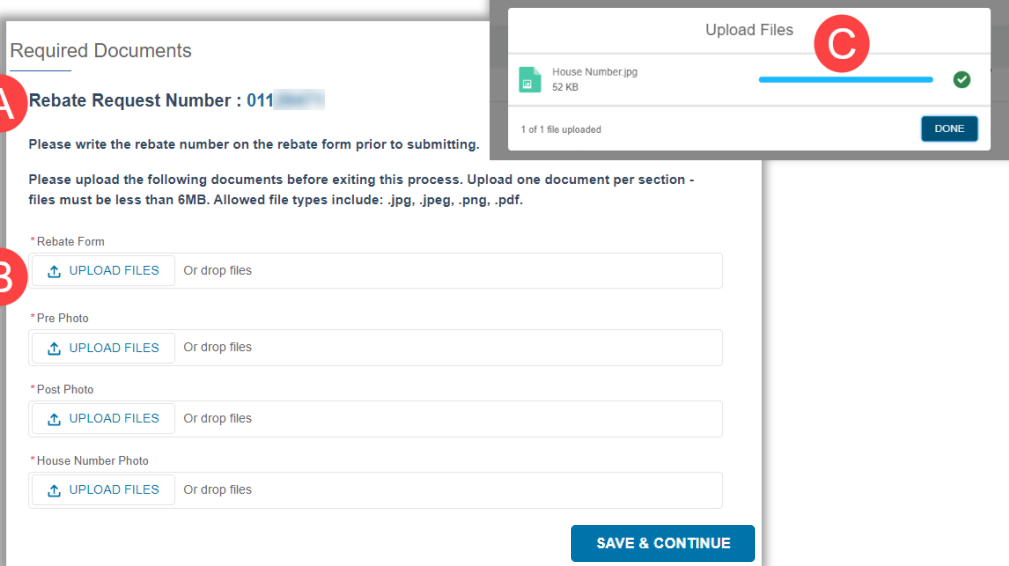
Note: If incorrect, select the Previous button and modify the Bill Account number.

- | | |
|---|--|
| 4 | <ul style="list-style-type: none"> Complete the Installation Information section Refer to the table below for details on what to complete Select Next |
|---|--|

Section	Details to enter
A. Existing R Value	Select checkbox to confirm existing R Value was below R8
B. Install details	Enter details – all fields are required
C. Rebate Information	No action needed – details will auto-populate

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Step	Action
5	<ul style="list-style-type: none"> Review the Terms and Conditions section Select the checkbox acknowledging the terms Select Next 

6	<ul style="list-style-type: none"> Complete the Required Document section Refer to the table below for details on what to complete Select Save & Continue once the required documents are uploaded 
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Section	Details
A. Rebate Request Number	<ul style="list-style-type: none"> Make note of the rebate request number Ensure it is displayed within the RCI Rebate Certificate
B. Required Documents	Select the Upload Files button to upload all required documents
C. Upload Files	<ul style="list-style-type: none"> Displays as file is being uploaded Will confirm whether the file was successfully updated or not <p>Note: File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.</p>

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Step

Action

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- Review the **Summary** section
- Select **Confirm**

Note: If needed, users will be able to print the Summary page.

Summary

Portfolio and Program

Programs : Residential Ceiling Insulation Install Date : 2023-02-08

Customer Information

Name : [Redacted] Billing Account Number : [Redacted]
Address : [Redacted] State : Florida
City : [Redacted] Zip Code : 32055

Rebate Information

Rebate Amount : 220 Issue Date : 2023-02-09

RCI Information

Existing R Value - Below R8? : Yes Resulting R Value : 30
Total Cost : 1300 Insulation Type : Fiberglass Blown
Sq. Ft. : 1200 Insulation Depth : 100
Date Received: 2023-02-09

[PREVIOUS](#) [CONFIRM](#)

8

- RCI Rebate Request submitted
- Review the Thank you page

Thank You

"We're on it. Your rebate # [Redacted] has been successfully submitted for processing. An FPL representative will review your submitted information for accuracy and completeness. Keep the request number handy! You'll need it to access FPL's PIC Portal to view the status of your rebate request."

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Residential HVAC Rebate Request

Directions: Use the steps below to submit a new rebate request for the Residential HVAC Program.

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

- Complete the **Portfolio and Program** section
- Refer to the table below for details on what to complete
- Select **Next**

Portfolio and Program

* Programs: Residential HVAC (A)

* Bill Account Number: [Redacted] (D)

* Install Date: 04-03-2023 (B)

* Zip: 33145 (E)

DOWNLOAD RHVAC REBATE CERTIFICATE (C)

NEXT

1

Section	Details to enter
A. Program	Select the applicable program (e.g., Residential HVAC)
B. Install Date	Enter the installation date
C. Download RHVAC Rebate Certificate	Allows user to download the rebate certificate Reminder: Certificate must be signed by the customer.
D. Bill Account Number	Enter the 10-digit bill account number (include any leading zero's)
E. Zip	Enter the zip code for the bill account

Reminder: RHVAC rebates must be submitted within 30 days of installation.

- Review the **Checklist** step
- Select **Next**

Checklist

You have selected the HVAC program, to submit a rebate you will need to upload the following documents:

- AHRI Certificate (If Applicable)
- Rebate Certificate
- Outside Unit Model Number Photo
- Inside Unit Model Number Photo
- House Number Photo

For more details please visit <https://www.fpl.com/partner/contractor.html>

PREVIOUS

NEXT

2

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

- | | |
|---|--|
| 3 | <ul style="list-style-type: none"> Review the Customer Information section Ensure details are correct Select Next |
|---|--|

Note: If incorrect, select the Previous button and modify the Bill Account number.

- | | |
|---|--|
| 4 | <ul style="list-style-type: none"> Complete the Installation Information section Refer to the table below on what to complete within Existing Equipment Details Scroll down to complete the next section |
|---|--|

Note: Fields are dynamic based on the Heating Type selected.

Section	Details to enter
A. Central A/C System	Select Yes or No Note: If Yes, is selected, then the <i>Cooling BTUH's</i> are required.
B. Heating Type	Select applicable type
C. Electric Resistance KW	Enter details if applicable Note: Field is dynamic based on the Heating Type selected.
D. Cooling BTUH's	Allows user to enter the Cooling BTUHs

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Step

Action

- Complete the **New Equipment Details** section of the **Installation** step
- Refer to the table below for details on what to complete
- Select **Next**

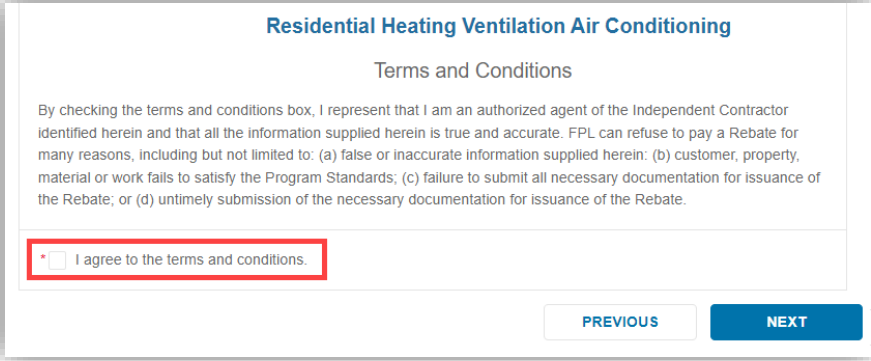
Note: Fields are dynamic based on the equipment type selected.

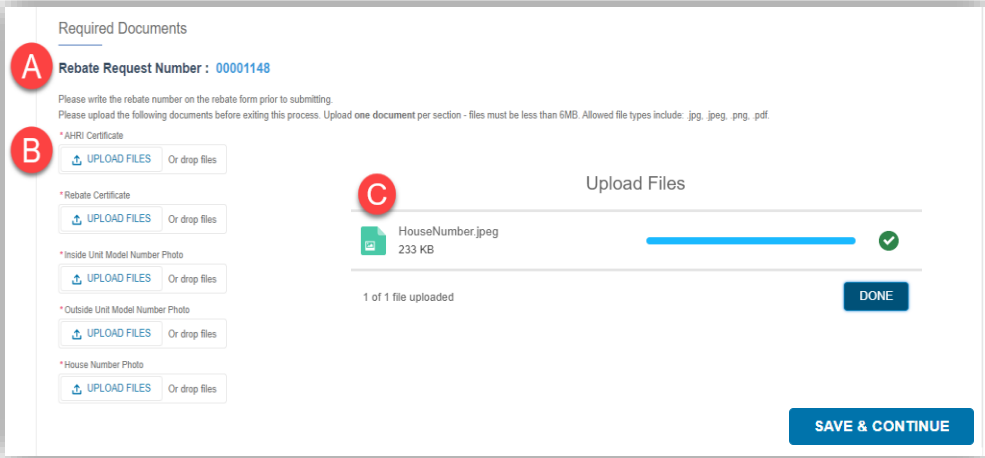
The screenshot shows the 'NEW EQUIPMENT DETAILS' form. Callout A points to the 'Total Cost' field. Callout B points to the 'VALIDATE AHRI' button. Callout C points to the 'Manual AHRI Entry' checkbox and the manufacturer/model fields. Callout D points to the 'On Call Not Present' button.

5

Section	Details to enter
A. Details	Enter all required details identified with a red asterisk
B. Validate AHRI	When selected, will validate information entered Note: If validation fails, select the <i>Manual AHRI Entry</i> checkbox.
C. Manual AHRI Entry	When selecting the checkbox, the fields will enable for entry
D. On Call Details	For premises with On Call present, indicate if the On Call wire was reconnected Note: If No, was selected, the Reason field will display.

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Step	Action
6	<ul style="list-style-type: none"> Review the Terms and Conditions section Select the checkbox acknowledging the terms Select Next 

7	<ul style="list-style-type: none"> Complete the Required Document section Refer to the table below for details on what to complete Select Save & Continue once the required documents are uploaded 
---	---

Section	Details
A. Rebate Request Number	<ul style="list-style-type: none"> Make note of the rebate request number Ensure it is displayed within the RHVAC Rebate Certificate
B. Required Documents	Select the Upload Files button to upload all required documents Important: If the AHRI # was entered manually then the AHRI Certificate is required to be uploaded.
C. Upload Files	<ul style="list-style-type: none"> Displays as file is being uploaded Will confirm whether the file was successfully updated or not Note: File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.

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Step

Action

8

- Review the **Summary** section
- Select **Confirm**

Summary

Portfolio and Program

Programs : Residential HVAC Install Date : 03-29-2023

Customer Information

Name : [REDACTED] Billing Account Number : [REDACTED]
 Address : [REDACTED] Dwelling Type : Single Family Residence
 State : Florida City : Miami
 Zip Code : 33142

Existing Equipment Details

Cooling BTUH's : Existing Central A/C System :
 Electric Resistance KW : 1304 Heating Type : Electric Resistance

New Equipment Details

Total Cost :	\$0.00	Program Measure :	Straight Cool
Air Handler in Attic :		New Equipment Type :	Straight Cool
Equipment Type 2 :	Air Cooled	Part of Multi System ? :	No
Number of Units. :	1	Heating Type :	Electric Resistance
Mini Split :	No	AHRI Reference No. :	4dd404
Cooling BTUH's :	5124	SEER :	16
Manufacturer/Model Inside :	123456	Manufacturer/Model Outside :	46975431
Manual AHRI Entry :	Yes	Electric Resistance KW :	4514
Heating BTUH's :		Coefficient Value :	
Coefficient :		If On Call equipment is present, was the low voltage On Call wire reconnected? :	On Call Not Present

Rebate Information

Rebate Amount : \$150.00

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- RHVAC Rebate Request submitted
- Review the Thank you page

Thank You

"We're on it. Your rebate # [REDACTED] has been successfully submitted for processing. An FPL representative will review your submitted information for accuracy and completeness. Keep the request number handy! You'll need it to access FPL's PIC Portal to view the status of your rebate request."

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LIWP Rebate Request

Directions: Use the steps below to submit a new rebate request for the Low Income Weatherization Program.

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

- Complete the **Portfolio and Program** section
- Refer to the table below for details on what to complete
- Select **Next**

1

Section	Details to enter
A. Program	Select the applicable program (e.g., Low Income)
B. Install Date	Enter the installation date
C. Download LIWP Rebate Certificate	Allows user to download the rebate certificate
D. Bill Account Number	Enter the 10-digit bill account number (include any leading zero's)
E. Zip	Enter the zip code for the bill account

- Review the **Customer Information** section
- Select **Next**

Note: If incorrect, select the Previous button and modify the Bill Account number.

2

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Step

Action

3

- Complete the **Measure Information** section
- Select the checkbox for all installed measures
- Select **Next**

Note: The Total Rebate Amount will auto-populate based on the selections made.

Measures Information

Please select all installed measures.

	MEASURE NAME	AMOUNT
<input checked="" type="checkbox"/>	Pipe Wrap	\$40.00
<input checked="" type="checkbox"/>	HVAC Inspection	\$80.00
<input type="checkbox"/>	Low Flow Showerhead	\$30.00
<input checked="" type="checkbox"/>	Weather Strip/Caulk	\$90.00
<input type="checkbox"/>	Faucet Aerators	\$10.00
<input type="checkbox"/>	LI - DUCT	\$60.00
<input checked="" type="checkbox"/>	Outdoor Coil Cleaning	\$60.00
<input type="checkbox"/>	LED Lights	\$5.00

Total Rebate Amount : \$270

[PREVIOUS](#) [NEXT](#)

4

- Review the **Terms and Conditions** section
- Select the checkbox acknowledging the terms
- Select **Next**

Terms And Conditions

Low Income Weatherization Program

Terms and Conditions

By checking the terms and conditions box, I represent that I am an authorized agent of the Independent Contractor identified herein and that all the information supplied herein is true and accurate. FPL can refuse to pay a Rebate for many reasons, including but not limited to: (a) false or inaccurate information supplied herein; (b) customer, property, material or work fails to satisfy the Program Standards; (c) failure to submit all necessary documentation for issuance of the Rebate; or (d) untimely submission of the necessary documentation for issuance of the Rebate.

I agree to the terms and conditions.

[PREVIOUS](#) [NEXT](#)

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Step

Action

5

- If applicable, upload any supporting documents within the **Required Document** section
 - Select **Save & Continue** to proceed
- Note:** File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.

Required Documents

Rebate Request Number:

Please write the rebate number on the rebate form prior to submitting.

If applicable, please upload the following documents before exiting this process. Files must be less than 6MB. Allowed file types include: .jpg, .jpeg, .png, .pdf.

Supporting Documents

Or drop files

6

- Review the **Summary** section
- Select **Confirm**

Summary

Portfolio and Program

Programs : Low Income Install Date : 04-03-2023

WAP Agency Information

Name : Juju Sap Vendor Number :
Address : Phone Number :
State : FL City : Citrus Park
Zip Code : 33625

Customer Information

Name : Billing Account Number :
Address : State : Florida
City : Miami Zip Code : 33145

Measure Information

Measure Name	Amount
Pipe Wrap	\$40.00
HVAC Inspection	\$80.00
Weather Strip/Caulk	\$90.00
Outdoor Coil Cleaning	\$60.00

Rebate Information

Total Rebate Amount : \$270.00

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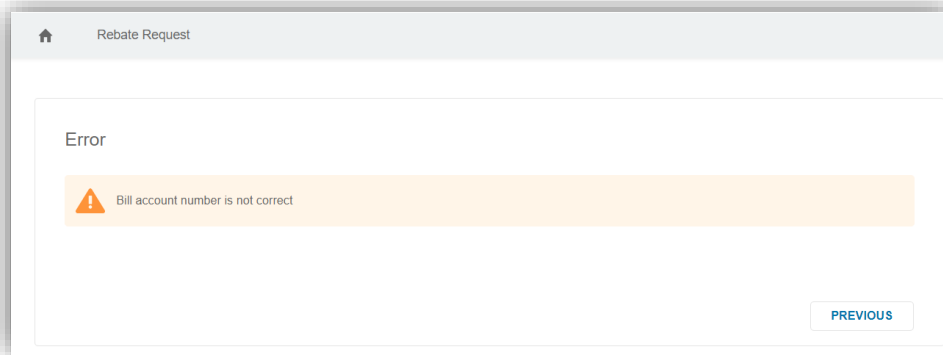
Step	Action
7	<ul style="list-style-type: none">• LIWP Rebate Request submitted• Review the Thank you page <p>Reminder: The rebate # can be used to view the status of your rebate request.</p> <div data-bbox="157 401 1385 691" style="border: 1px solid #ccc; padding: 10px;"><p><u>Thank You</u></p><p>"We're on it. Your rebate # [REDACTED] has been successfully submitted for processing. An FPL representative will review your submitted information for accuracy and completeness. Keep the request number handy! You'll need it to access FPL's PIC Portal to view the status of your rebate request."</p></div>

Error and Warning Messages

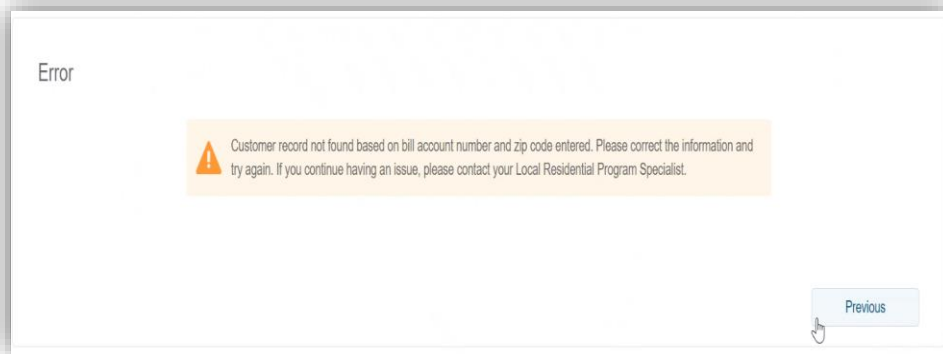
Below are examples of the various error and warning messages you *may* encounter when submitting a rebate request.

Examples

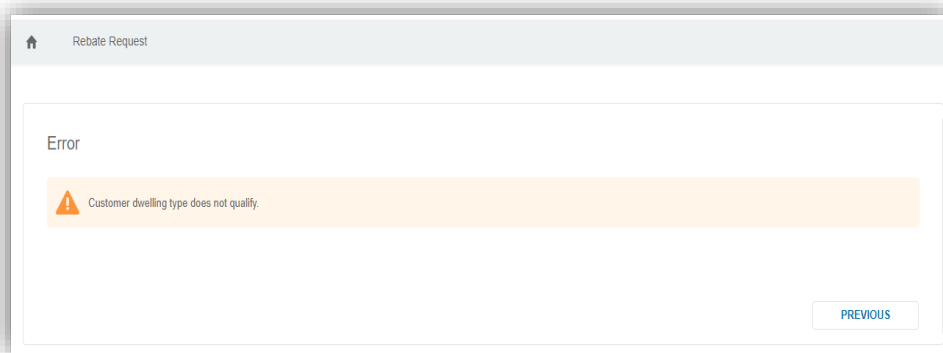
- Incorrect Bill Account Number Entered



- Incorrect Zip Code Entered

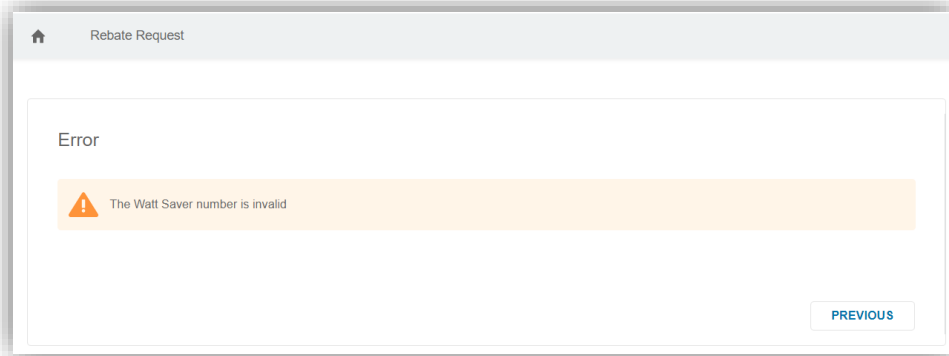


- Dwelling Type Does Not Qualify

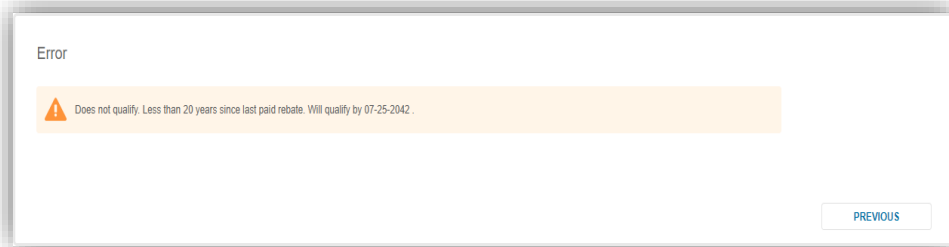


Examples

- Watt-Saver Number is Invalid



- Rebate Already Redeemed



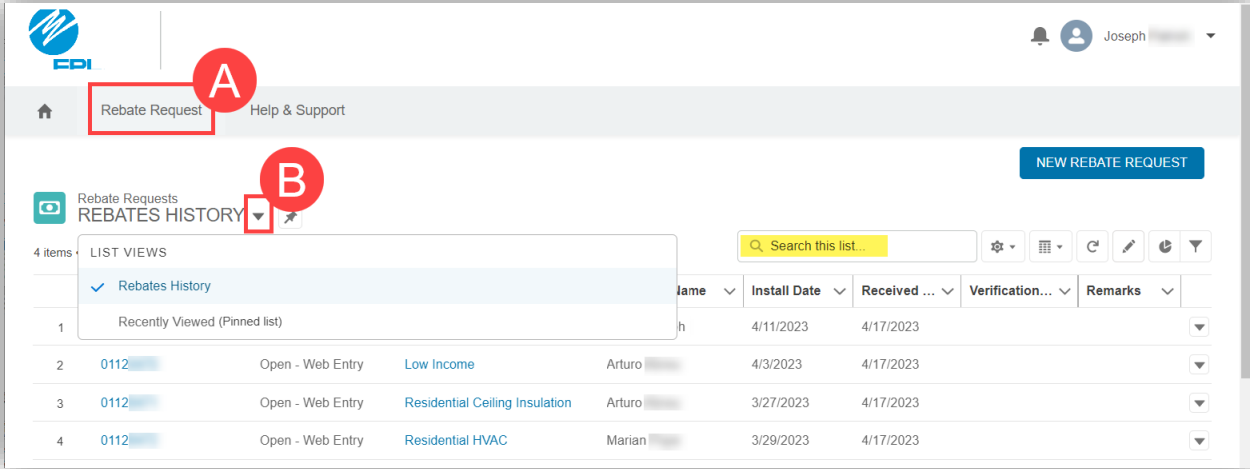
DSM Contractor Portal – User Guide for PICs

Rebate Requests History

The Rebate Request History section of the **FPL DSM Contractor Portal**, allows the PIC to view previously submitted rebates.

Important: PICs are required to monitor the statuses of their rebates for potential errors such as: Paperwork error.

Directions: Use the steps below to access and navigate through the Rebate Requests History section.

Step	Action						
1	<p>To view the history of a previously submitted rebate request:</p> <p>A. Select Rebate Request from the grey toolbar</p> <p>B. Select the applicable List View by clicking on the drop-down arrow</p> <p>Note: Refer to the table below for details on the various list views.</p>  <table border="1" data-bbox="142 1290 1382 1580"> <thead> <tr> <th>List View</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Recently Viewed</td> <td> <ul style="list-style-type: none"> Default List View Includes recently viewed/submitted rebates <p>Note: To change the default, select the pin next to the desired List View.</p> </td> </tr> <tr> <td>Rebates History</td> <td>Display a full list of all submitted rebates</td> </tr> </tbody> </table> <p>Important:</p> <ul style="list-style-type: none"> List views vary depending on the programs supported by your company. Users can search for a specific rebate request by entering the rebate number in the “Search this list...” field. 	List View	Description	Recently Viewed	<ul style="list-style-type: none"> Default List View Includes recently viewed/submitted rebates <p>Note: To change the default, select the pin next to the desired List View.</p>	Rebates History	Display a full list of all submitted rebates
List View	Description						
Recently Viewed	<ul style="list-style-type: none"> Default List View Includes recently viewed/submitted rebates <p>Note: To change the default, select the pin next to the desired List View.</p>						
Rebates History	Display a full list of all submitted rebates						

DSM Contractor Portal – User Guide for PICs

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

- Once the applicable List View is selected, select the Rebate Number hyperlink to access the details
- Refer to the table below for the at-a-glance information found within a List View

The screenshot shows a table titled 'Rebate Requests REBATES HISTORY' with 100+ items. The columns are: Rebate Number (A), Rebate Status (B), Program Name (C), Customer Name (D), Install Date (E), Received Date (F), Verification Result (G), and Remarks (H). The table contains 5 rows of data with various statuses like 'Open - Web Entry', 'Open Pending Verification', 'Open - Paperwork Error', 'Vouchered', and 'Open Re-Verification'.

Section	Description														
A. Rebate Number	When selecting the Rebate Number hyperlink, details for the selected rebate will display Note: Refer to the Rebate Request Overview section for details.														
B. Rebate Status	<table border="1"> <thead> <tr> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Open-Web Entry</td> <td>Rebate pending review</td> </tr> <tr> <td>Open-Pending Verification</td> <td>Rebate has been selected for verification</td> </tr> <tr> <td>Open-Paperwork Error</td> <td>Rebate has documentation error(s)</td> </tr> <tr> <td>Open-Re-Verification</td> <td>Rebate has been selected for re-verification</td> </tr> <tr> <td>Open Resubmission</td> <td>Rebate has been updated and resubmitted for review</td> </tr> <tr> <td>Vouchered</td> <td>Rebate has been processed</td> </tr> </tbody> </table>	Status	Description	Open-Web Entry	Rebate pending review	Open-Pending Verification	Rebate has been selected for verification	Open-Paperwork Error	Rebate has documentation error(s)	Open-Re-Verification	Rebate has been selected for re-verification	Open Resubmission	Rebate has been updated and resubmitted for review	Vouchered	Rebate has been processed
Status	Description														
Open-Web Entry	Rebate pending review														
Open-Pending Verification	Rebate has been selected for verification														
Open-Paperwork Error	Rebate has documentation error(s)														
Open-Re-Verification	Rebate has been selected for re-verification														
Open Resubmission	Rebate has been updated and resubmitted for review														
Vouchered	Rebate has been processed														
C. Program Name	Displays program rebate was submitted for														
D. Customer Name	Displays customer name														
E. Install Date	Displays date of installation														
F. Received Date	Displays date request was received														
G. Verification Result	Displays verification results														
H. Remarks	Displays remarks														

Note: Clicking on Program Name hyperlink will display details of the program.

2

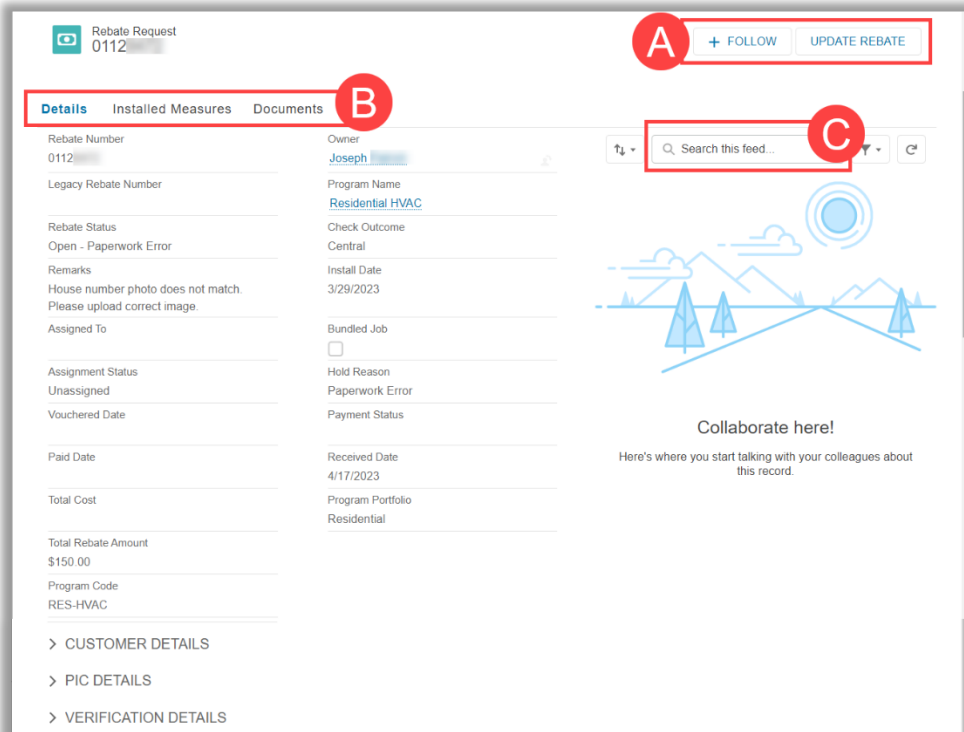
DSM Contractor Portal – User Guide for PICs

Rebate Request Overview

When selecting the applicable Rebate Number hyperlink from the Rebate Request History section, you'll see all details that were originally entered when the rebate submittal was initially entered.

Directions: Refer to the table below for details on the various tabs and the information found within the Rebate Request Overview section.

Parts & Functions



Section	Description
A. Buttons	<ul style="list-style-type: none"> Follow – Allows users to see status updates on the Chatter feed Update Rebate – Allows users to correct any paperwork error identified <p>Important: Refer to the Correcting Paperwork Error for details on how to update the rebate.</p>
B. Tabs	<p>Allows users to toggle between the follow tabs:</p> <ul style="list-style-type: none"> Details – Displays status and remarks along with Customer, PIC, Verification and WATT Saver Details Installed Measures – Displays details entered during submittal Documents – Display all files/documents uploaded
C. Chatter	<p>Allows users to initiate a message by tagging their Program Specialist on the identified request</p> <p>Note: Users must use the @ symbol to tag someone (e.g., @Name).</p>

DSM Contractor Portal – User Guide for PICs

Correcting Paperwork Error Overview

PICs are required to correct any rebate request identified as having paperwork error or failed verification.

The *Remarks* section of the Rebate Request Overview will further explain the required action/error.

Refer to the steps below for an overview on how to correct paperwork error(s).

Rebate Request 0112		
Details	Installed Measures	Documents
Rebate Number 0112	Owner Joseph	
Legacy Rebate Number	Program Name Residential HVAC	
Rebate Status Open - Paperwork Error	Check Outcome Central	
Remarks House number photo does not match. Please upload correct image.	Install Date 3/29/2023	
Assigned To	Bundled Job <input type="checkbox"/>	

Step

Action

Select the "Update Rebate" button from the Rebate Request Overview page

Note: Action will redirect you to the Rebate Request flow.

1

Rebate Request 0112		
Details	Installed Measures	Documents
Rebate Number 0112	Owner Joseph	
Legacy Rebate Number	Program Name Residential HVAC	
Rebate Status Open - Paperwork Error	Check Outcome Central	
Remarks House number photo does not match. Please upload correct image.	Install Date 3/29/2023	
Assigned To	Bundled Job <input type="checkbox"/>	

2

Within the Rebate Request flow, navigate through the applicable section/step to make the necessary updates.

Important:

- The Terms and Conditions checkbox must be reselected.
- PIC must go through the entire flow and resubmit the rebate with the updated details/documents.

3

Ensure the Thank You message displays, which confirms the rebate request has been resubmitted

Note: The rebate # will remain the same.

Thank You

"We're on it. Your rebate # [REDACTED] has been successfully submitted for processing. An FPL representative will review your submitted information for accuracy and completeness. Keep the request number handy! You'll need it to access FPL's PIC Portal to view the status of your rebate request."

OK

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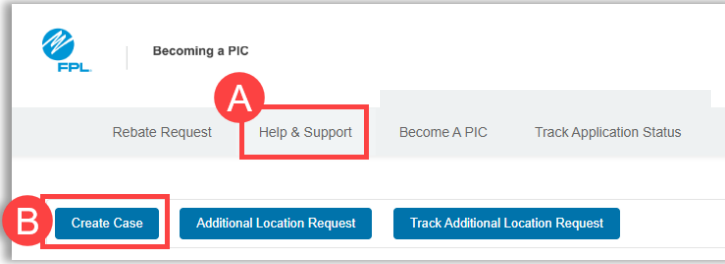
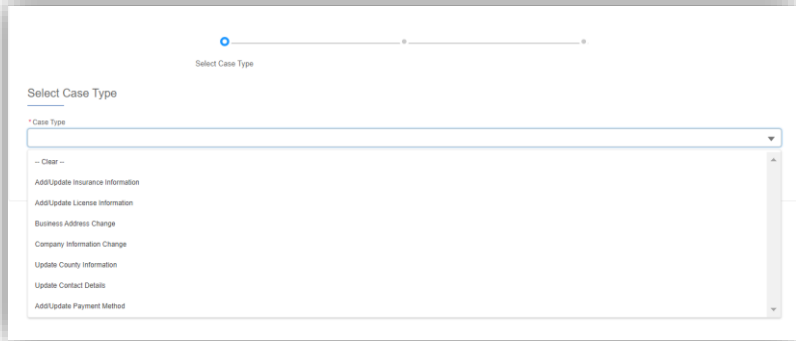
Help & Support – Create Case

The Help & Support section of the **FPL DSM Contractor Portal**, allows users to create Cases which are used to request changes to the PICs User Profile. There are various Case Types to select from and required fields/information are dynamic based on the type selected.

Note: For changes to the company name or ownership contact your Program Specialist.

Directions: Use the steps below to initiate a new Case request via the FPL DSM Contractor Portal.

Initiating a Case

Step	Action			
1	<p>To initiate a case from the FPL PIC Portal</p> <p>A. Select Help & Support from the grey toolbar</p> <p>B. Select the Create Case button</p> 			
2	<p>Within the Select Case Type section, select the applicable Case Type from the drop-down menu</p> 			
3	<p>Important: This user guide will provide the steps and actions to take when completing the following cases:</p> <table border="1" data-bbox="139 1630 772 1804"> <thead> <tr> <th>Case Type</th> </tr> </thead> <tbody> <tr> <td>Add/update Insurance Information</td> </tr> <tr> <td>Company Information Change</td> </tr> </tbody> </table>	Case Type	Add/update Insurance Information	Company Information Change
Case Type				
Add/update Insurance Information				
Company Information Change				

DSM Contractor Portal – User Guide for PICs

Case Type – Add/Update Insurance Information

Directions: Use the steps below to submit an Add/update Insurance Information Case request.

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

1

- Review the Checklist details after initiating the Case
- Click **Next**

Checklist

In order to successfully request a change, you will be required to provide specific documents based on the case type selected.

Add/Update Insurance Information

- A copy of the new insurance document

PREVIOUS NEXT

2

- Complete required fields identified with a red asterisk
- For the Case Subject, enter: Add/update License Information
- Click **Next**

Add/Update Insurance Information

* Case Subject

* Policy Number

* Insurance Carrier Name

* Expiration Date

PREVIOUS NEXT

3

- Upload any supporting documents within the Update Documents section
- Click **Next** to continue

Results: A confirmation message will display with the Case number.

Important: Refer to the [Case History](#) section to see the status of your request.

Upload Documents

* Supporting Documents

UPLOAD FILES Or drop files

PREVIOUS NEXT

DSM Contractor Portal – User Guide for PICs

Case Type – Company Information Change

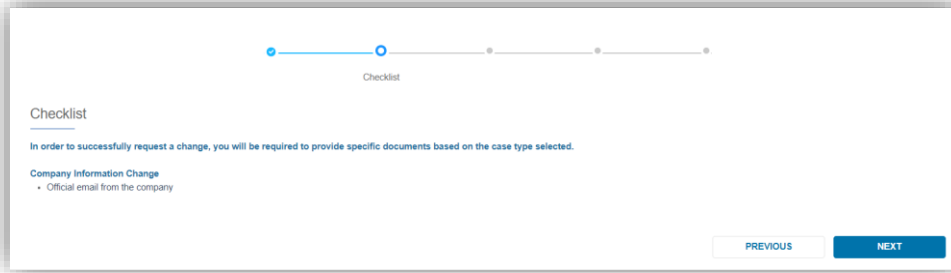
Directions: Use the steps below to submit a Company Information Change Case request.

Step

Action

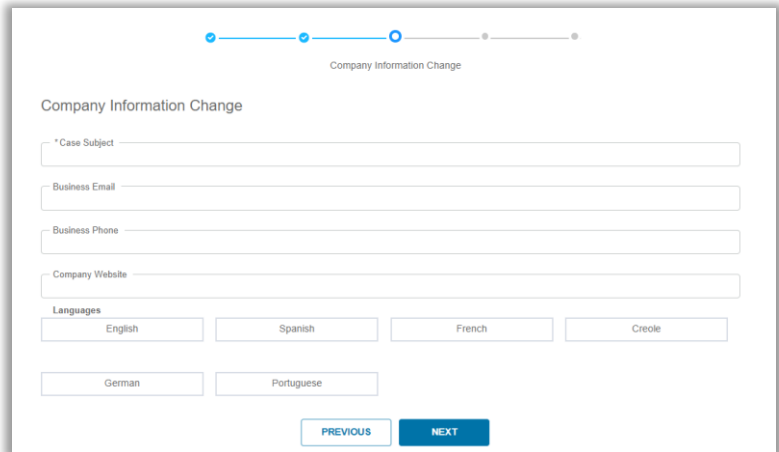
1

- Review the Checklist details after initiating the Case
- Click **Next**



2

- For the Case Subject, enter: Company Information Change
- Complete applicable fields for which the information is changing
- Click **Next**

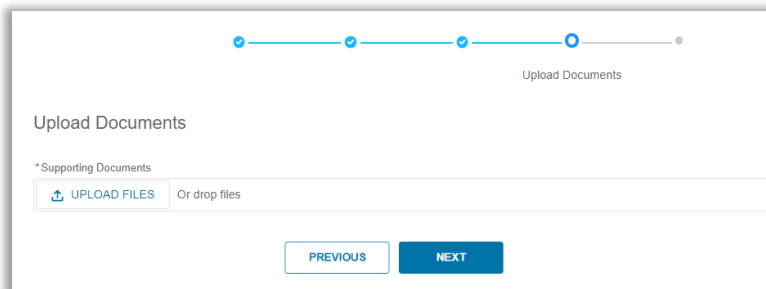


3

- Upload any supporting documents within the Update Documents section
- Click **Next** to continue

Results: A confirmation message will display with the Case number.

Important: Refer to the [Case History](#) section to see the status of your request.



DSM Contractor Portal – User Guide for PICs

Help & Support – Case History

After submitting a Case, the history will display within the **Case History** section. Within this section, you'll have the option to modify the List View by selecting on the drop-down arrow.

Note: List View will default to: Recently Viewed, however the PIC should *pin* their ideal List View to see the details of a submitted case.

Directions: Use the steps below to access and navigate through the Case History section.

Parts & Functions

Once the applicable List View is selected:

- Select the Case Number hyperlink to access the details
- Refer to the table below for the at-a-glance information found within a List View

Note: Columns/details within each List View will vary.

Case Number	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Owner
00003386	Reema	ff	Open	Medium	11/30/2022, 8:52 AM	rgeor
00003384	Reema	Checking the validation on policy number	Open	Medium	11/30/2022, 8:22 AM	rgeor
00003382	Reema	briew	Open	Medium	11/30/2022, 8:17 AM	rgeor
00003381	Reema	need insurance	Open	Medium	11/30/2022, 8:11 AM	rgeor

Section	Description
A. Case Number	When selecting the Case Number hyperlink, details for the selected case will display Note: Refer to the Case Overview section for additional details.
B. Contact Name	Displays the contact for the submitted case
C. Subject	Displays the subject of the submitted case
D. Status	Displays case status
E. Priority	Displays the case priority
F. Date/Time Opened	Displays the date and time case was opened
G. Case Owner Alias	Displays which group will be reviewing the case

DSM Contractor Portal – User Guide for PICs

Case Overview

After selecting the applicable Case Number hyperlink, you'll see the details that were originally entered when the case was created.

Directions: Refer to the table below for details on the various tabs and information found within the Case Overview.

Parts & Functions

The screenshot shows the 'Case Overview' page for 'Add/Update Insurance Information'. Callout A points to the top right action buttons: '+ FOLLOW', 'EDIT', 'CLONE', and 'SUBMIT FOR APPROVAL'. Callout B points to the 'DETAILS' and 'RELATED' tabs. Callout C points to the 'Close Case', 'Post', and 'Question' options, along with a 'CREATE NEW...' button and an 'ADD' button. Callout D points to the case history feed, showing a post by 'Joseph (Partner)' with a case icon and the number '00005'. Callout E points to the 'LIKE' and 'COMMENT' options, with a text input field for comments.

Section	Description
A. Buttons	<ul style="list-style-type: none"> Follow – Allows users to see status updates on the Chatter feed Edit – Allows users to modify certain fields Clone – Not applicable Submit for Approval – Not applicable
B. Tabs	<p>Allows users to toggle between the follow tabs:</p> <ul style="list-style-type: none"> Details – Displays details pertinent to the selected case Related – Displays any documents/files that were uploaded
C. Chatter Tabs	<p>Allows users to initiate a message by tagging their Program Specialist on the identified case</p> <p>Note: Users must use the @ symbol to tag someone (e.g., @Name).</p>
D. Case Overview History	Displays history of interactions related to the selected case
E. Comment	Feature not available for use

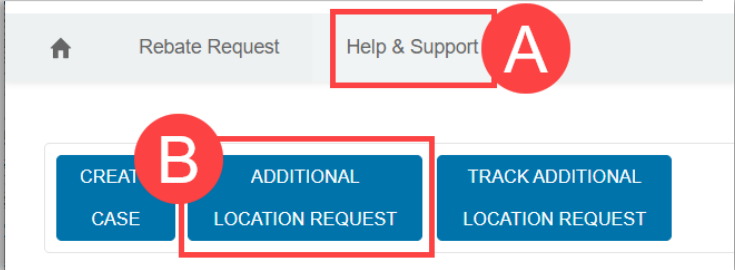
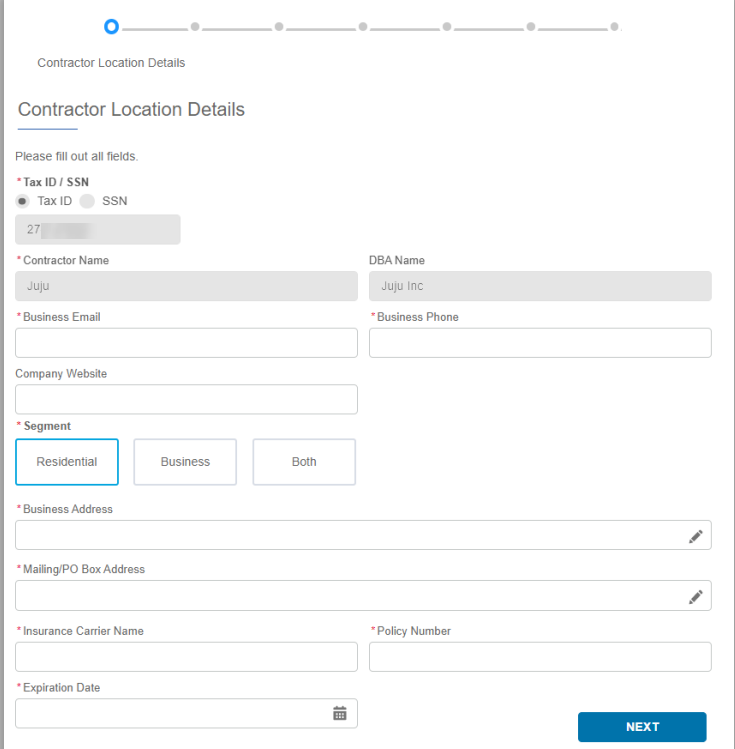
DSM Contractor Portal – User Guide for PICs

Help & Support – Additional Location Request

The Help & Support section of the **FPL DSM Contractor Portal**, will also allow users to add additional locations to their existing profile if the Tax ID is the same for all locations.

Note: If the location you are adding has a different Tax ID than the current profile, a new profile must be created. Refer to the User Guide to Become a PIC for these steps.

Directions: Use the steps below for requests to add additional locations.

Step	Action
1	<p>To initiate an additional location request via the FPL PIC Portal</p> <p>A. Select Help & Support from the grey toolbar</p> <p>B. Select the Additional Location Request button</p> 
2	<p>Complete the Contractor Location Details then select Next</p> <div data-bbox="139 1020 654 1483" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center;">Required Fields</p> <ul style="list-style-type: none"> Business Email Business Phone Company Website – if applicable Segment Business Address Mailing PO Box Address – if same as business address, re-enter the information Insurance Carrier Name Policy Number Expiration Date </div> <p>Note</p> <ul style="list-style-type: none"> Required fields are marked with a red asterisk. When searching for an address, do not use “#” for apartments or suites. 

DSM Contractor Portal – User Guide for PICs

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

3

Section	Items to enter
A. Silhouette icon	Click the icon to open the contact details fields
B. Contact Details	<ul style="list-style-type: none"> • Contact details (all field are required) <ul style="list-style-type: none"> • For the Role field, select from: <ul style="list-style-type: none"> • Principal Owner • Office Manager • Rebate Processing Clerk • Save details <p>Note: Continue to use your existing log-in credentials for access to the FPL PIC Portal.</p>
C. Add another contact	If applicable, click the plus sign to open the <i>Contact Details fields</i> to add additional contacts

Important: Contact details can be added for up to three representatives.

DSM Contractor Portal – User Guide for PICs

Step

Action

- Complete the **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.

4

Section	Items to enter
A. New icon	Click the plus sign to open the <i>Program Selection fields</i>
B. Program Selection	<ul style="list-style-type: none"> • Details for the program being supported (all fields are required) • Save details <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

DSM Contractor Portal – User Guide for PICs

Step

Action

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

5

Section	Items to select
A. Hours of Service	Select checkbox if your company will be available 24x7
B. Languages	Select all languages supported by your company
C. Counties Served	Select counties serviced by your company

DSM Contractor Portal – User Guide for PICs


Step

Action

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

Note: If needed, select the Back button and navigate to the section(s) that require modification.

6



Review and Submit

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

Contractor Details

Tax ID or SSN :	TaxID	Tax ID or SSN Number :	27 [redacted]
Contractor Name :	Juju	Segment :	Both
Business Phone :	561 [redacted]	Business Email :	[redacted]@gmail.com
DBA Name :	Juju Inc	Company Website :	
Billing Address :	1201 Northwest Le Jeune Road, FL, Miami 33126		Mailing/PO Box Address : 1201 Northwest Le Jeune Road, FL, Miami 33126

Contacts Details

First Name	Last Name	Phone Number	Email	Role
John	Wick	561 [redacted]	[redacted]@gmail.com	Principal Owner

Program Selection

Segment	Program Interested In	Product Brands	License Type	License Number	License Expiration Date
Residential	Residential HVAC	Arcoaire,Armstrong AC	County	565 [redacted]	4/19/2024

Service Preferences

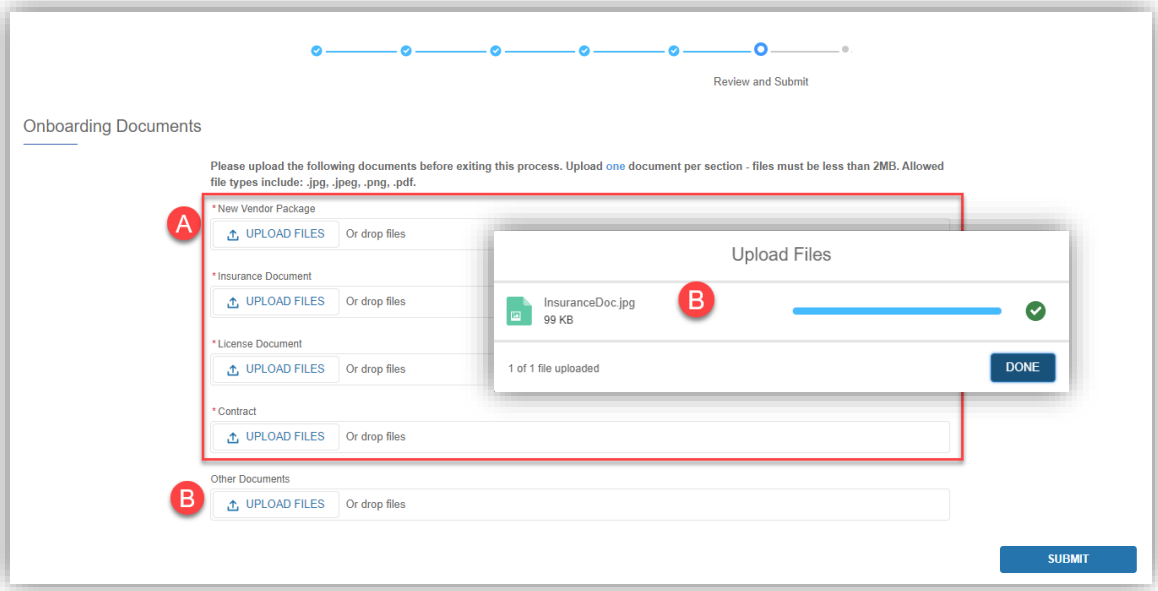
Counties :	Alachua County;Baker County;Bay County
Languages :	English
24/7 Service :	Yes

DSM Contractor Portal – User Guide for PICs

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



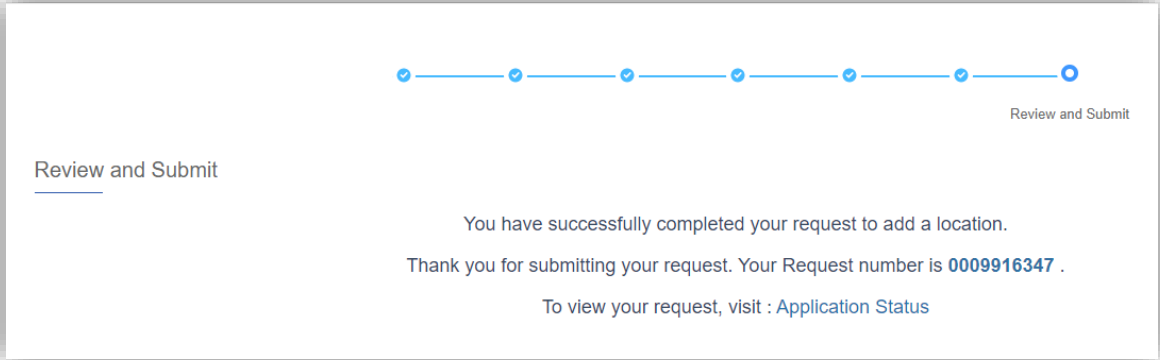
7

Section	Items to upload
A. Required Documents	Select the <i>Upload Files</i> button to upload all required documents 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 PICs

Step	Action
8	<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="178 382 1328 743"><p>Review and Submit</p><p>You have successfully completed your request to add a location.</p><p>Thank you for submitting your request. Your Request number is 0009916347 .</p><p>To view your request, visit : Application Status</p></div>

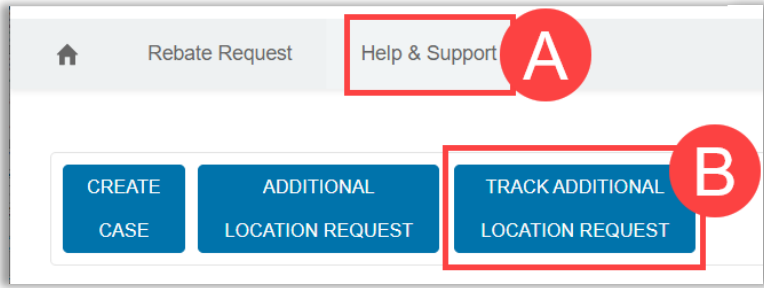
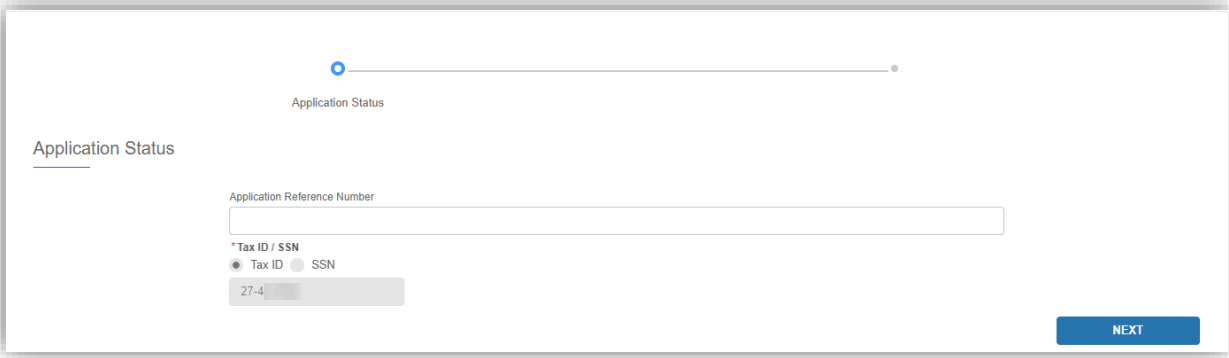
DSM Contractor Portal – User Guide for PICs

Help & Support – Track Additional Location Request

The Help & Support section of the **FPL DSM Contractor Portal**, will allow users to check the status of a previously submitted additional location request.

Note: To check the status, PICs will need the reference number of the previously submitted request.

Directions: Use the steps below to check the status of a previously submitted additional locations request.

Step	Action
1	<p>To initiate an additional location request via the FPL PIC Portal</p> <ul style="list-style-type: none">A. Select Help & Support from the grey toolbarB. Select the Track Additional Location Request button  <p>The screenshot shows a grey toolbar with a home icon, 'Rebate Request', and 'Help & Support'. A red box labeled 'A' highlights the 'Help & Support' button. Below the toolbar are three blue buttons: 'CREATE CASE', 'ADDITIONAL LOCATION REQUEST', and 'TRACK ADDITIONAL LOCATION REQUEST'. A red box labeled 'B' highlights the 'TRACK ADDITIONAL LOCATION REQUEST' button.</p>
2	<ul style="list-style-type: none">• Enter the application reference number• Select Next once details are entered  <p>The screenshot shows a form titled 'Application Status' with a progress indicator at the top. Below the title is a text input field labeled 'Application Reference Number'. Underneath the input field are radio buttons for 'Tax ID / SSN', with 'Tax ID' selected. A 'NEXT' button is located at the bottom right of the form.</p>

DSM Contractor Portal – User Guide for PICs

Step

Action

- Review the **Status** and any applicable **Remarks**
- Use the table below to determine next steps based on the Status displayed

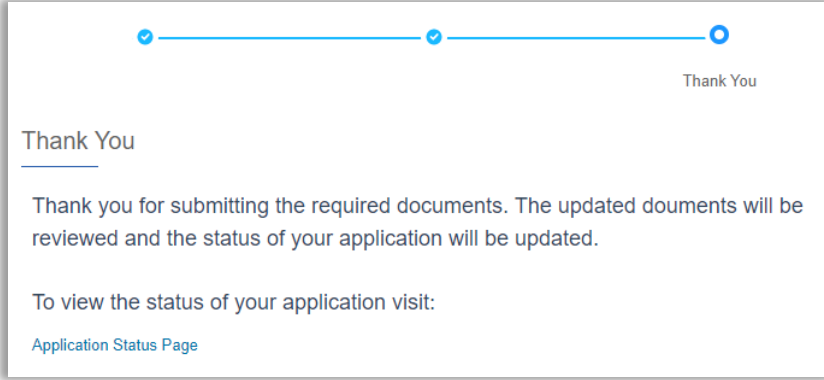
Important:

- The Resubmit Documents section will display if the request is in the “Documentation Error” status.
- File format allowed for upload include JPG, JPEG, PNG and PDF. Additionally, files must be less than 6MB.

3

Status	Next steps
Pending	No action needed – request is pending review
In Progress	No action needed – request is under review
Documentation Error	<ul style="list-style-type: none"> • One or multiple documents had errors • Refer to the remarks sections to identify which document(s) had the error • Complete the Resubmit Documents section by reuploading the document(s) identified • Select Submit
Rejected	<ul style="list-style-type: none"> • No action needed – application has been rejected • Refer to the remark’s sections for details

DSM Contractor Portal – User Guide for PICs

Step	Action
4	<p>If reuploading the document(s), a Thank you page will display</p>  <p>Thank You</p> <p>Thank you for submitting the required documents. The updated documents will be reviewed and the status of your application will be updated.</p> <p>To view the status of your application visit:</p> <p>Application Status Page</p>

DSM Contractor Portal – User Guide for PICs

Payment Research via the Supplier Portal

PICs who provide products or services to NextEra/FPL, should create a [Supplier Portal User ID](#) to view and access their procurement and financial information.

Within the Supplier Portal, PICs will be able to check on the status of payments.

The screenshot shows the FPL Supplier Login page. At the top, there is a navigation bar with links for Print, Newsroom, Contact Us, Site Map, Careers, and a dropdown menu for 'Doing Business with FPL' with a search box. Below this is a secondary navigation bar with links for myFPL Account, Ways to Save, Customer Support, and For Business. The main content area is titled 'Supplier Log In' and includes a prompt: 'Please fill in these fields, then click Log In.' There are two input fields: 'Supplier User ID:' and 'Password:'. Below the password field is a 'Log In' button. To the left of the main content is a sidebar with the following links: 'Supplier Login' (with a 'LOGIN' button and 'Forgot Your User ID?' and 'Forgot Password?' links), 'Participating Independent Contractors' (with sub-links for 'PIC Center', 'PIC FAQs', and 'PIC Contacts'), and 'All Suppliers' (with sub-links for 'Supplier Home', 'Supplier FAQs', and 'Contact AP'). On the right side of the main content area, there are links for 'Not Registered -- Create User ID and Password', 'Forgotten Supplier User ID', and 'Forgotten Password'. A 'Feedback' button is located on the far right edge of the page.

Important: PICs are required to self-register in order to gain access to the Supplier Portal.