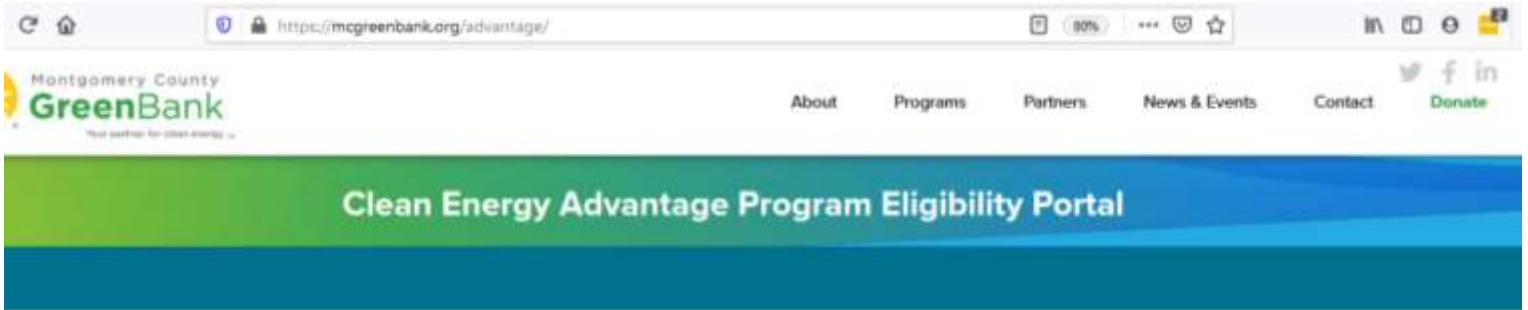


# Guide for: Montgomery County Green Bank Eligibility Screening Portal



Welcome to the Clean Energy Advantage Program Eligibility Portal!

[Access CEA Program Portal Here:](#)

Eligibility Portal Access Link

It should not take more than a minute of your time to answer several quick questions on this portal to find out if you are eligible for the Montgomery County Green Bank's Clean Energy Advantage Program.

The Montgomery County Green Bank provides Montgomery County, MD homeowners access to the Clean Energy Advantage Program when you apply for a loan to make energy efficiency or renewable energy home improvements from one of our Clean Energy Advantage Program Lending Partners.

[Find loan estimator here:](#)

Loan Estimator

You may find this tool useful to help you assess the potential monthly payment amount using various interest rates, loan terms, and your loan amounts, we offer a model financial loan estimator to provide you with an estimate. You can enter any interest rate or term that you want to test. The results are indicative and are not the actual loan payment amounts which will be determined by the lender and you after you complete your loan application with your selected lender.

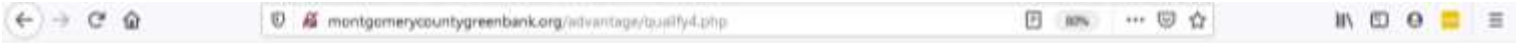
#### What to Expect:

If you qualify, the portal will send you, your Clean Energy Advantage Program Authorized Contractor, and the Montgomery County Green Bank an email documenting that you qualify for the program when you work with the Clean Energy Advantage Program Authorized Contractor that you have selected. Remember, you must use a Clean Energy Advantage Program Authorized Contractor to do the work. Should you later choose to use a different Clean Energy Advantage Program Authorized Contractor, you will need to re-enter this portal and re-answer the Program Eligibility questions.

THE CLEAN ENERGY ADVANTAGE PROGRAM IS A PROGRAM OFFERED BY PARTICIPATING BANKS AND CREDIT UNIONS. THE MONTGOMERY COUNTY GREEN BANK IS NOT A LENDER AND IS NOT OFFERING ANY LOANS UNDER THE CLEAN ENERGY ADVANTAGE PROGRAM. ANY LOANS PROVIDED UNDER THE CLEAN ENERGY ADVANTAGE PROGRAM WILL BE BETWEEN THE PARTICIPATING LENDER AND THE HOMEOWNER.

# Screening Questions

## Choose Contractor

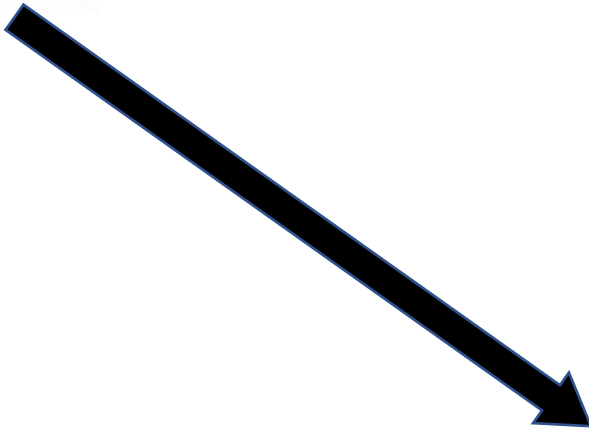


### Clean Energy Advantage Program Qualifying Questions

Welcome to the Montgomery County Green Bank Clean Energy Advantage Program self-certification portal. We applaud you for considering making clean energy improvements to your home and contributing to Montgomery County's efforts to reduce greenhouse gas emissions!! The Green Bank's Clean Energy Advantage Program enables you to access affordable, transparent loans from our Program lending partners -- NASA Federal Credit Union and the Clean Energy Credit Union -- when you use a Program Authorized Contractor like the company that provided you with this web link and meet basic non-financial Program eligibility requirements. Thank you for completing this quick and easy self-certification form. It will take you less than 1 minute to complete and will enable the Green Bank to comply with its reporting requirements to Montgomery County. -->

This is Page 1 of 11 short pages.

Please select your Authorized Contractor:



- Choose a contractor
- Altenergy Inc.
- Argent Heating & Cooling
- At Your Service: Heating and Cooling
- Atlas Home Energy Solutions
- Elysian Energy Solutions
- Energy Efficiency Experts
- Glenmont Heating and Air Conditioning
- Green Brilliance
- Ground Loop, Inc.
- Hight on Homes
- Home Energy Savings Solutions
- Ipsun-Solar
- Revolution Solar
- Solar Energy World
- Standard Energy Solutions
- TRAINING - Test Contractor
- Tuckers Air Conditioning, Heating, & Plumbing
- My contractor is not listed
- Choose a contractor

## Contact Name



### Clean Energy Advantage Program Qualifying Questions

This is Page 2 of 11 short pages

Please enter your contact at your authorized contractor:

Energy Joe

Submit

Enter name of contractor contact person/salesperson for company.

## Property Address



### Clean Energy Advantage Program Qualifying Questions

This is Page 3 of 11 short pages

Please enter your property address:

Street:   
City:   
State:   
Zip Code:

Submit

Enter property address here.

# Montgomery County Property Verification



## Clean Energy Advantage Program Qualifying Questions

This is Page 4 of 11 short pages.

Is the home on which you will be making clean energy improvements located in Montgomery County, Maryland?

- Yes
- No

Submit

Property must be located in Montgomery County, MD.

# Home Ownership



## Clean Energy Advantage Program Qualifying Questions

This is Page 5 of 11 short pages.

Do you own your home or do you rent?

- Own
- Rent

Submit

Applicant must own home where work is to be performed.

# Owner Occupancy

← → ↻ 🏠 | [montgomerycountyg reenbank.org/advantage/qualify4.php?p=4&q=3](https://montgomerycountyg reenbank.org/advantage/qualify4.php?p=4&q=3) | 40% | ⋮ | 📄 | 📧 | 📌 | ☰

Go back one page  
Right-click or pull down to show history

## Clean Energy Advantage Program Qualifying Questions

This is Page 6 of 11 short pages.

Do you live in the home in which you will be making energy efficiency or renewable energy improvements?

Yes  
 No

**Applicant must live in the home where work is to be performed.**

# Eligible Projects

← → ↻ 🏠 | [montgomerycountyg reenbank.org/advantage/qualify4.php?p=4&q=4](https://montgomerycountyg reenbank.org/advantage/qualify4.php?p=4&q=4) | 80% | ⋮ | 📄 | 📧 | 📌 | ☰

## Clean Energy Advantage Program Qualifying Questions

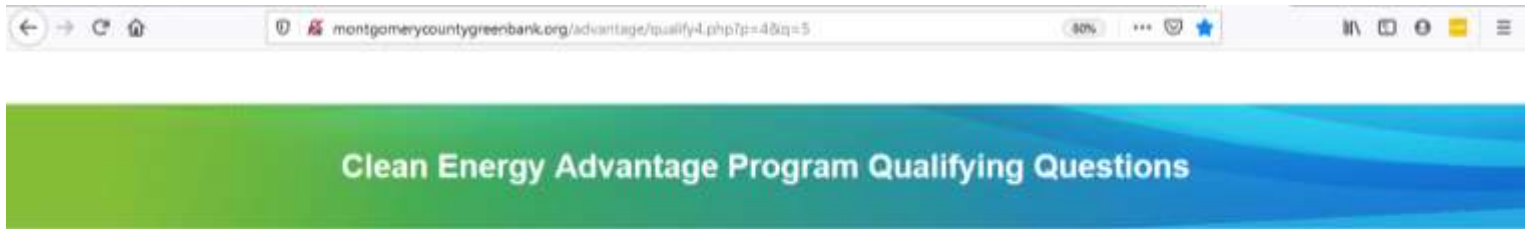
This is Page 7 of 11 short pages.

Are you using the funds for one of the following? Solar PV, Air Leakage Reduction, insulation, Duct Sealing, Electric Heating, Cooling or Hot Water, Gas Heating and Hot Water, Geothermal, Energy Storage, Electric Vehicle Charging

Yes  
 No

**Applicant must use funds for eligible measures only.**

## Type of Work



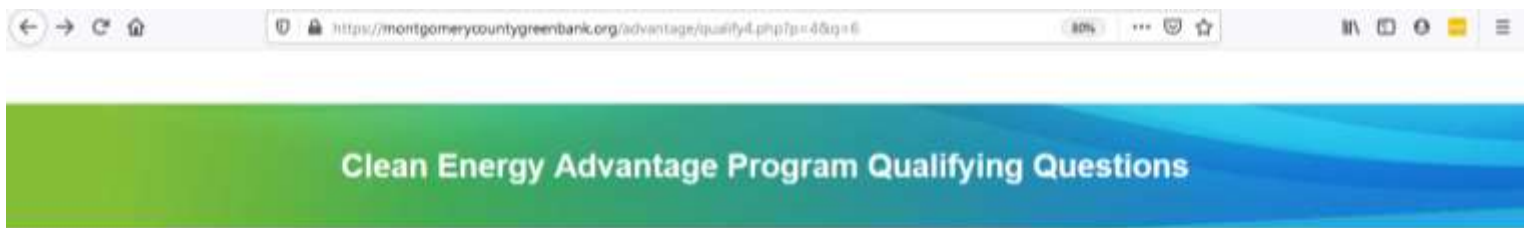
This is Page 8 of 11 short pages.

Tell us what work you will most likely be financing through the Montgomery County Green Bank Clean Energy Advantage. Choose all that apply.

- Solar PV
- Air Leakage Reduction, Insulation, Duct Sealing
- Electric Heating, Cooling or Hot Water
- Gas Heating or Hot Water
- Geothermal
- Energy Storage
- Electric Vehicle Charging
- Associated Compliance Measures

Select all applicable measures to be implemented with Green Bank financing.

## Use of Funds



This is Page 9 of 11 short pages.

Do you agree to only apply for the amount of funds needed to complete your clean energy project and not to use your loan proceeds for other, non-energy efficiency or renewable energy-related home improvements?

- Yes
- No

Must agree to use funds for eligible measures.

# Rebate Program Verification for Energy Efficiency Upgrades



## Clean Energy Advantage Program Qualifying Questions

This is Page 10 of 11 short pages

Are your clean energy home improvements being done by your contractor under a utility's Home Performance with Energy Star ("HPwES") program?

- Yes
- No
- I don't know

**For air sealing, Insulation, Duct Sealing or related projects alone or in combination with HVAC upgrades, select yes.**

**Solar, Geothermal, Storage, EV Charging Contractors: Select No**

# Applicant Info and Lender Selection



This is Page 11 of 11 short pages.

Please enter the following and select your lender to complete this process:

Your name:

Your email address:

Estimated square footage of your home:

Please select your Residential Lender:

Choose a lender

For more information on the programs offered by the Montgomery County Greenbank residential lending partners and a payment calculator, please [click here](#) and then return to this page to finish selecting your lender.

Once you click the submit button, please be patient while we process your form.

Please select your Residential Lender:

Choose a lender

- Choose a lender
- Clean Energy CU
- NASA FCU
- TRAINING - Test Lender - NASA
- TRAINING - Test Lender CECU

Once you click the submit button,



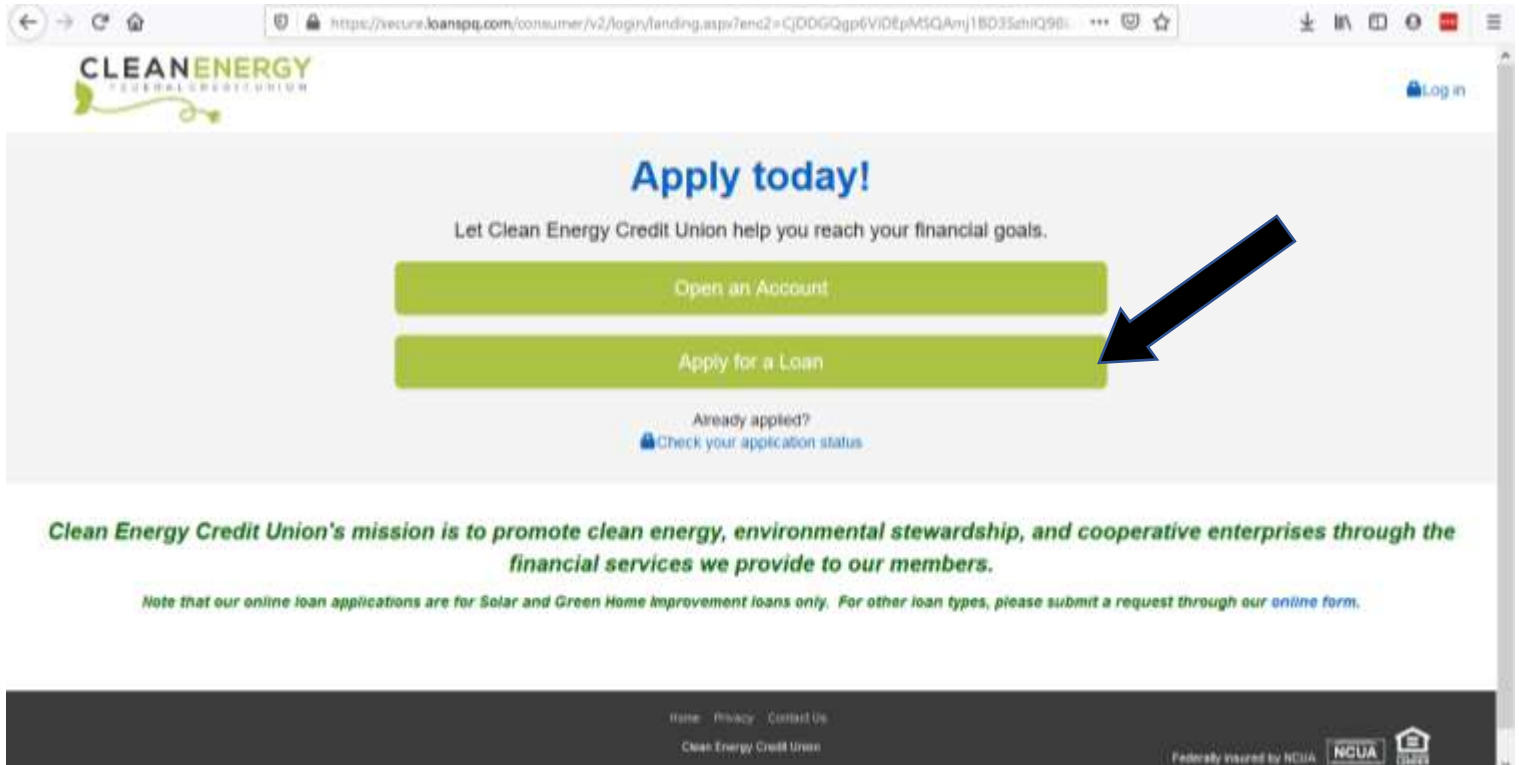
# Clean Energy Advantage Program Qualifying Questions

You have submitted all 11 pages.

Lender Name: Clean Energy CU  
Lender Access Code: MCOGB CEA Program  
Lender Application Form: [Click here for the online financial application](#)

Thank you for self-certifying for the Montgomery County Clean Energy Advantage program. You may close this window in your browser, or click to go to the online financial application for the lender you have chosen.

# Guide for: Clean Energy Credit Union Application Portal



The screenshot shows a web browser window displaying the Clean Energy Credit Union application portal. The browser's address bar shows the URL: <https://secure.loanspg.com/consumer/v2/login/landing.aspx?enc2=CJDDGQgp6VIDEpMSQAmj1BD35chiQ9B>. The page features the Clean Energy Credit Union logo in the top left and a "Log in" link in the top right. The main content area is titled "Apply today!" and includes the text "Let Clean Energy Credit Union help you reach your financial goals." Below this text are two prominent green buttons: "Open an Account" and "Apply for a Loan". A large black arrow points to the "Apply for a Loan" button. Underneath the buttons, there is a link for "Already applied? Check your application status". At the bottom of the page, there is a mission statement: "Clean Energy Credit Union's mission is to promote clean energy, environmental stewardship, and cooperative enterprises through the financial services we provide to our members." A note below the mission statement states: "Note that our online loan applications are for Solar and Green Home Improvement loans only. For other loan types, please submit a request through our [online form](#)." The footer contains navigation links for "Home", "Privacy", and "Contact Us", the text "Clean Energy Credit Union", and logos for "Federally insured by NCUA", "NCUA", and "FDIC".

**CLEANENERGY**  
FEDERAL CREDIT UNION

Log in

## Apply today!

Let Clean Energy Credit Union help you reach your financial goals.

Open an Account

Apply for a Loan

Already applied?  
[Check your application status](#)

*Clean Energy Credit Union's mission is to promote clean energy, environmental stewardship, and cooperative enterprises through the financial services we provide to our members.*

*Note that our online loan applications are for Solar and Green Home Improvement loans only. For other loan types, please submit a request through our [online form](#).*

Home Privacy Contact Us  
Clean Energy Credit Union

Federally insured by NCUA NCUA FDIC

## What type of loan are you applying for?



Choose Personal Loan.

[< Return Home](#)

**Clean Energy Credit Union's mission is to promote clean energy, environmental stewardship, and cooperative enterprises through the financial services we provide to our members.**

*Note that our online loan applications are for Solar and Green Home Improvement loans only. For other loan types, please submit a request through our [online form](#).*

# Sign Up for Account

CLEAN ENERGY  
FEDERAL CREDIT UNION

## Personal Loan

[Login / New User Sign-up Message \(Responsive site\)](#)  
*Note: Clean Energy CU members, your current online banking login will not work on this site.*

**Log In** | **Sign Up**

User Name:

Password:

**Log In**

[Forgot Username?](#) | [Forgot Password?](#)

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CLEAN ENERGY  
FEDERAL CREDIT UNION

## Personal Loan

[Login / New User Sign-up Message \(Responsive site\)](#)  
*Note: Clean Energy CU members, your current online banking login will not work on this site.*

**Log In** | **Sign Up**

Choose your username:

Enter your email:

Create a password:

Password requirements:  
Must be 8 to 15 characters long  
Password must contain at least one letter  
Password must contain at least one number  
Password must contain at least one symbol

**Sign Up**

# Let's Get Started

Step 1

What's your primary reason for applying?

- Geothermal Loan - Combo
- Geothermal Loan - Long Term
- Geothermal Loan - Short Term
- Green Home Improvement
- Solar Loan - Combo
- Solar Loan - Long Term
- Solar Loan - Short Term

Choose one of the following based on customer's needs.

Combined = Short Term and Long Term loan as one application. Refer to additional instructions in Loan Information section below.


Long Term loan. This is JUST if the customer is interested in ONLY the fixed term 12 or 15 year loan

Short Term loan. This is JUST if customer is interested ONLY in the fixed term 12 or 18 months loan for up to 26% of the project costs.

Continue

# Primary Applicant Info

← → ↻ 🏠 <https://secure.loanspq.com/Consumer/v2/Personal/LoanApp/applicant.aspx> 90% 🌐 ⌂ 📧



## Tell us about the primary applicant... Save & finish later

---

### Personal Information

<b>First Name</b> <input type="text"/>	<b>Middle Name (optional)</b> <input type="text"/>	<b>Last Name</b> <input type="text"/>	<b>Suffix (optional)</b> <input type="text"/>
<b>Date of Birth</b> <input type="text" value="mm/dd/yyyy"/>	<b>SSN</b> <input type="text" value="xxx-xx-xxxx"/>	<b>Member Number (optional)</b> <input type="text"/>	

**Citizenship**  
 NON-PERM RESIDENT  PERM RESIDENT  US CITIZEN

---

### Contact Information

**Phone Number**

We may contact this number with information regarding the loan

**Email**

---

### Identification

<b>Driver's License Number</b> <input type="text"/>	<b>State</b> <input type="text" value="MD"/>
<b>Date issued</b> <input type="text" value="mm/dd/yyyy"/>	
<b>Expiration Date</b> <input type="text" value="mm/dd/yyyy"/>	

# Primary Applicant Info Cont'd

## Current Address

### Country

UNITED STATES MINOR OUTLYING ISL

### Address

### Address 2 (optional)

### Postal Code (optional)

### City (optional)

### Occupancy Status

### How long have you lived here?

0 Years 0 Months

Continue

Go Back

← → ↻ 🏠 <http://secure.loanspq.com/Consumer/v2/Personal/LoanApp/applicant.aspx> 100% 🔍 ⌵ 📄 🗑️ 📱 📧 📧 📧

## Employment Information

### Employment Status

### Profession/Job Title

### Employer (optional)

### Employer Phone (optional)

### Time Employed (optional)

0 Years 0 Months

## Primary Applicant Financial Information

### Financial Information

#### Monthly Income

Alimony, child support or separate maintenance income need not be revealed if you do not choose to have it considered as a basis for repaying this obligation.

#### Monthly Rent/Housing Payment (optional)

Continue

Go Back

Provide only primary applicant's income here. If you seek to include another person's income, add a co-applicant and document their income in the section below.

## Co-Applicant Info

Time Employed  
20 Years 0 Months

### Financial Information

Monthly Income  
\$ 10000000

Alimony, child support or separate maintenance income need not be revealed if you do not choose to have it considered as a basis for repaying this obligation.

Monthly Rent/Housing Payment (optional)  
\$ 3200

Continue Go Back

**Would you like to add another applicant?**

Yes, I would like to add another applicant

No, continue without another applicant

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Clean Energy Credit Union  
Federally Insured by NCUA NCUA

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# Co-Applicant Info Cont'd

← → ↻ 🏠 <https://secure.loantpq.com/Consumer/v2/Personal/LoanApp/coapplicant.aspx> 90% ⌵ ⌵ ⌵ ⌵ ⌵

**CLEAN ENERGY**  
FEDERAL CREDIT UNION


## Tell us about the co-applicant...

[Save & finish later](#)

---

### Co-Applicant Information

Is this a Joint Applicant with RONALD WALDER? [\(What is this?\)](#)  
 Yes, this is a joint applicant.  No, this is a non-joint co-applicant.



### Personal Information

<b>First Name</b>	<b>Middle Name (optional)</b>	<b>Last Name</b>	<b>Suffix (optional)</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

<b>Date of Birth</b>	<b>SSN</b>	<b>Member Number (optional)</b>
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="XXX-XX-XXXX"/>	<input type="text"/>

### Citizenship

[Continue](#) [Go Back](#)

← → ↻ 🏠 <https://secure.loantpq.com/Consumer/v2/Personal/LoanApp/coapplicant.aspx> 90% ⌵ ⌵ ⌵ ⌵ ⌵

### Citizenship

NON-PERM RESIDENT  PERM RESIDENT  US CITIZEN

### Contact Information

**Phone Number**

Home

We may contact this number with information regarding the loan.

**Email**

### Identification

**Driver's License Number**

**State**

**Date issued**

[Continue](#) [Go Back](#)

### Employment Information

Employment Status

Profession/Job Title

Employer (optional)

Employer Phone (optional)

Time Employed (optional)

0 Years 0 Months

[Continue](#) [Go Back](#)

### Financial Information

Monthly Income

Provide only co-applicant's income here.

Alimony, child support or separate maintenance income need not be revealed if you do not choose to have it considered as a basis for repaying this obligation.

Monthly Rent/Housing Payment (optional)

[Continue](#) [Go Back](#)

# Loan Information

The screenshot shows the 'Loan Information' page on the Clean Energy website. It includes a 'Personal Loan Information' section with fields for 'Desired Loan Amount', 'Desired Loan Term (Months)', and a text area for a loan description. Callout boxes provide instructions: the first points to the loan amount field, the second to the loan term dropdown, and the third to the description field. At the bottom are 'Continue' and 'Go Back' buttons.

Enter total Desired Loan Amount (for combo, enter combined desired loan amount for short PLUS long term) plus \$2,000. Additional \$2,000 cost will minimize need to redo the underwriting for loan amount if final costs

For Combo OR Long-Term Loans, choose Long Term loan duration: 144 months (12 years) or 180 months (15 years). If requesting ONLY a short-term loan then enter Short-term loan duration

For Combo Loan applications, enter Short Term Loan dollar amount and the Desired Loan Term (12 or 18 months) here.

*"Short Term Desired Loan Amount: \$XXXXX  
Short Term Desired Loan Term: [12 or 18] Months"*

For Combo and Long-Term loan applications, enter the amount of other funding (cash or other financing) being brought to the project. *"Other funding resources being provided by customer is: \$XXXXX"*.

# Additional Questions

The screenshot shows the 'Additional Questions' page. It features a note about a 2% discount for autopay, followed by text input fields for dealer/contractor name and email, and a dropdown for county. Callout boxes provide instructions: one points to the autopay note, another to the email field, and a third to the county dropdown. At the bottom are 'Continue' and 'Go Back' buttons.

**BE SURE:** Customer says yes to autopay to assure they will get the lowest possible interest rate.

**BE SURE:** Customer provides your company's notification email here so your team will get approval notices.

You can provide multiple emails here. Use a semi-colon ( ; ) between each email address.

Enter Montgomery County.

# References

REFERENCES - PLEASE PROVIDE THE FOLLOWING INFORMATION.  
Please enter name of nearest relative NOT living with you.

Please enter address of above reference, (Street, City, State and Zip)

Please enter phone number for above reference, (xxx-xxx-xxxx)

Relationship of above reference.

PLEASE PROVIDE ADDITIONAL REFERENCE  
Please enter name of nearest relative NOT living with you.

Continue Go Back

**NOTE: This section refers to "References". These are additional contacts in case lender cannot reach customer. These are not personal references that will be contacted as part of loan application.**

PLEASE PROVIDE ADDITIONAL REFERENCE  
Please enter name of nearest relative NOT living with you.

Please enter address of additional reference, (Street, City, State and Zip)

Please select relation of additional reference.

Please enter phone number for additional reference, (xxx-xxx-xxxx)

**Add second reference here.**

# Asset Information

← → ↻ 🏠 <https://secure.loanhq.com/Consumer/v2/Personal/LoanApp/personal.aspx> 90% 🔍 ⌵ 📄 📱 📧 📧

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## Asset Information

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**Assets for RONALD WALDER**

**Asset Value**  
(Value of your new Solar Panels / Clean Energy Equipment)



\$ 0

**Additional comments** (optional)

[Continue](#) [Go Back](#)

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Indicate total contract value of installed system.