Energy Provider Portal – Utility Provider

Created: 11/22/2021
Last Updated: 12/10/2021

Energy Provider Portal Overview

The Energy Provider Portal is part of the North Carolina Families Accessing Services through Technology (NC FAST) program. The Energy Provider Portal is built upon the Salesforce platform and exists to simplify the approval and invoicing process for both utility providers and state/county officials when providing assistance to low-income households.

Step-by-Step Instructions

1. **Register for an NCID Account**
2. **Submit A Provider Enrollment Application**
3. **Logging In to Energy Provider Portal / Adding an Additional User**
4. **Navigating the Energy Provider Portal**
5. **Update Provider Account Details**
6. **Create a New Provider Contract (Vendor Agreement)**
7. **View & Edit Provider Contracts**
8. **View Pledge Payments & Generate Invoices**
9. **Locate, Review & Edit Invoices**
10. **Create Additional Provider Accounts With The Same NCID**
11. **Link An Existing Provider Account To Your NCID**
12. **Additional Resources & Help**

Register for an NCID Account

North Carolina Identity Management Service (NCID) is the standard identity management service that allows state, local, business, and individual users to access North Carolina's applications and information systems in a secure, access-controlled manner. In order to log in to the Energy Provider Portal, you must have an active NCID.

1. To create a new NCID, navigate to https://ncid.nc.gov.

2. Click Register! In the bottom right corner of the blue box.

NCID Tips

NCID

NCID

Username

Password

NCID Login

Forgot Username
Forgot Password
Unlock Account

Need Help?   Register!

Privacy and Other Policies   Contact Us

WARNING: This is a government
computer system, which may be
accessed and used only for authorized business
by authorized personnel. Unauthorized access or use of
this computer system may subject violators to criminal,
civil and/or administrative action.
NCC742

3. Select **BUSINESS** when asked to indicate your desired user type.

North Carolina Identity Management

NCID

New User Registration

Please indicate your user type from one of the following categories:

Individual	Request access to the State of North Carolina services as an individual or citizen.
Business	Request access to the State of North Carolina services on the behalf of a business.
State Employee	Currently employed or assigned to work for an agency within the State of North Carolina government.
Local Government Employee	Currently employed or assigned to work for a North Carolina county or municipality.

This system is the property of the State of North Carolina and is for authorized use only. Unauthorized access is a violation of federal and state law. All software, data transactions, and electronic communications are subject to monitoring.

North Carolina
www.nc.gov   Privacy and Other Policies   Contact Us

4. Complete each required field to create an NCID account. Once you complete the registration form, you will be sent an automated email asking you to authenticate your account and complete your security questions.

   Note: You may not create an NCID username with any spaces in it.

5. After receiving the automated New NCID User Verification email, click on the link that says **CLICK HERE** or enter the 6-digit code received in the email and click **CONTINUE**.
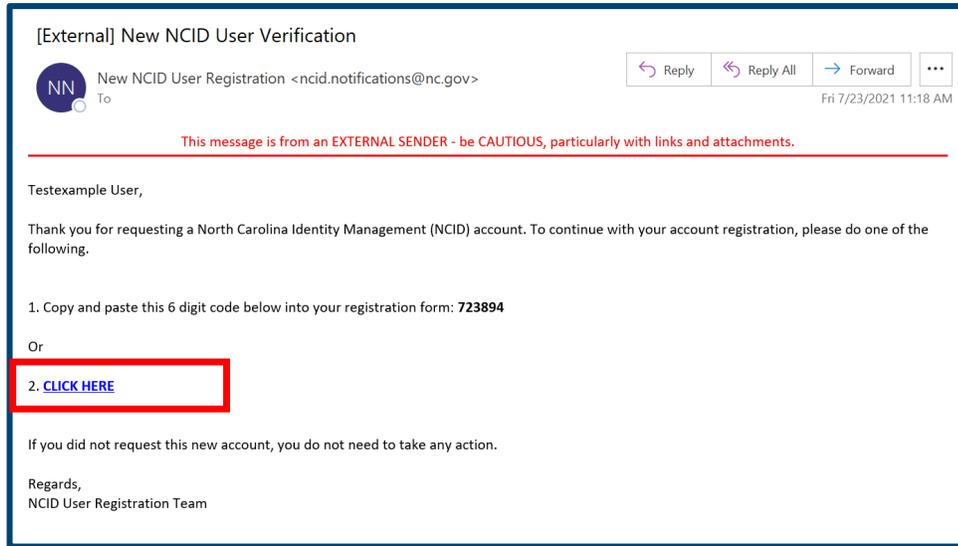
6. Sign in again using your new NCID username and password.

7. Complete all five security questions by using the drop-down options and typing your answers into the free-text fields and click **SAVE ANSWERS**.
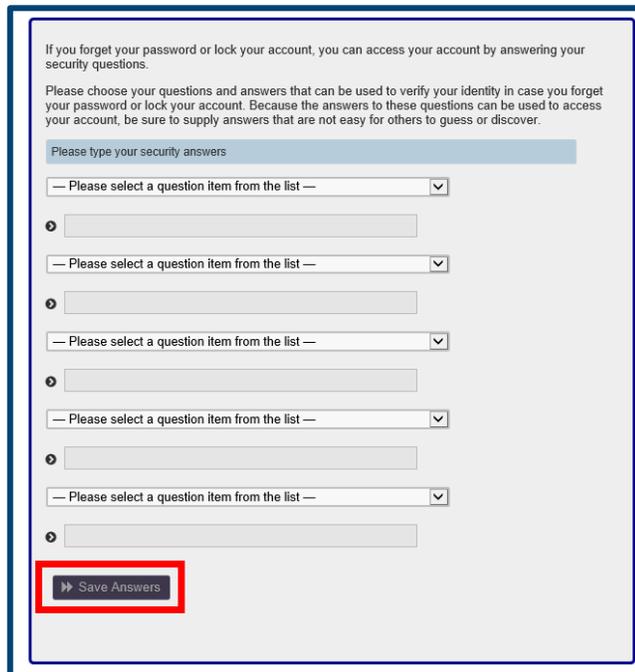
8. Your NCID account is now successfully created, and you can gain access to the Energy Provider Portal by either creating your utility provider account, or by using the appropriate provider access code if your provider account already exists.

Submit A Provider Enrollment Application

Before taking part in a utility assistance program, you must first submit a provider enrollment application for the counties where you are providing utilities, as well as submit a provider contract (vendor agreement) for the specific utility you wish to provide. After you submit an enrollment application via the Energy Provider Portal, a State Information Support user will be able to review and approve both the enrollment and the contract, which will allow you to begin invoicing the county for North Carolina residents who receive utility assistance.

Note: Any utility provider whose account was created as part of a data load will not need to submit a provider enrollment application. You will receive a provider access code which you can use to log in to your existing account. Please refer to the Logging in to Energy Provider Portal / Adding and Additional User section of this job aid.

1. Navigate to the Energy Provider Portal at https://energyproviderportal.nc.gov.

2. Click on the **NCID-ENERGY** button.

3. Enter your NCID username and password, then click **NCID LOGIN**.

4. When prompted to enter your Provider Access Code, leave the field **BLANK** and click **NEXT**.

5. Select if your provider will be using a FEIN (Federal Employer Identification Number) or SSN (Social Security Number) and enter it into the field with no dashes. Click **NEXT**.

Note: Your FEIN or SSN may be associated to multiple Energy Provider Portal provider accounts because you service multiple counties. In these instances, the accounts will be differentiated by the county where service is provided.

6. Enter in each field in the next section and verify that the information is accurate, then click **NEXT**.

   a. **Provider / Company Name**: The name of the utility provider (40 characters or less).

      Note: Do not add the name of the county to the Provider / Company Name field.

   b. **Address:** The street address of the provider.

   c. **City:** The city of the provider.

   d. **Zip Code:** The zip code of the provider.

   e. **State:** The state of the provider.

   f. **County:** Select the county or counties where utility services are provided.

      Note: If a provider services multiple counties, you must set up an Energy Provider Portal account for each county that you service. To set up multiple accounts for multiple counties, use the scroll bar in the **County** field to locate each serviced county. Hold the **CTRL** (Control) key on your keyboard, and click on the county name. Repeat this process for each county until you have highlighted each county you want to have an Energy Provider Portal account. For more information on how you may associate multiple accounts to one NCID, please refer to the Create Additional Provider Accounts With The Same NCID

section or the [Link An Existing Provider Account To Your NCID](#) section of this job aid.

g. **Primary Category**: Indicates which category of utility you deliver.

h. **Email Address**: The email address at which you can be reached.

i. **Web Address**: The utility provider website.

   Note: This is an optional field, but if entered it must be 100 characters or less.

j. **Phone Number**: The primary phone number for you to be contacted.

7. Review the county/counties that you are creating accounts for to ensure you've selected the correct one(s) and click **NEXT**.
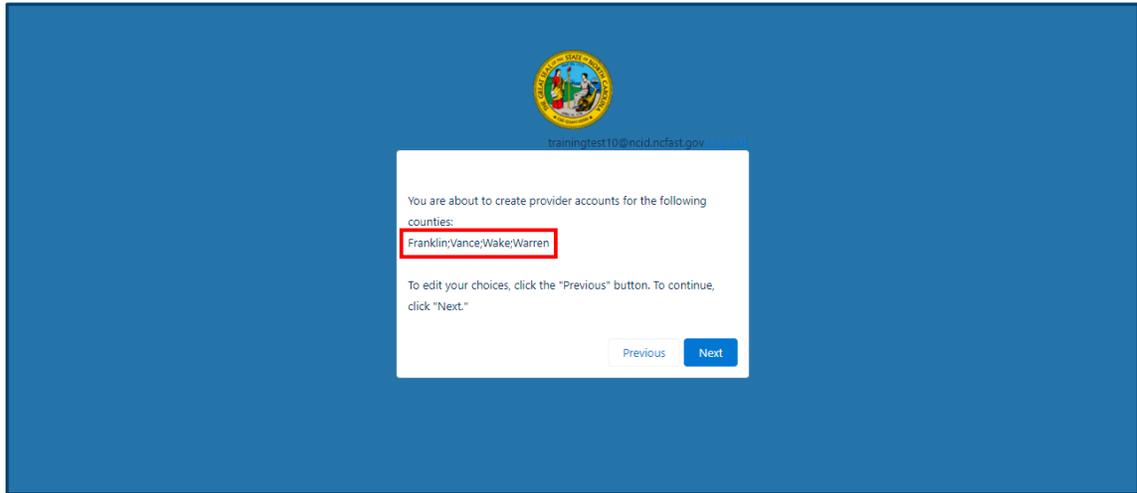
8. You are now logged in to the Energy Provider Portal. If you selected to create multiple accounts for more than one county, you will see a screen asking you to select which account to operate in. Select an account to continue the enrollment application process.

   Note: At any point if you need to reach this screen again and select a different account to operate in, click the **HOME** tab.
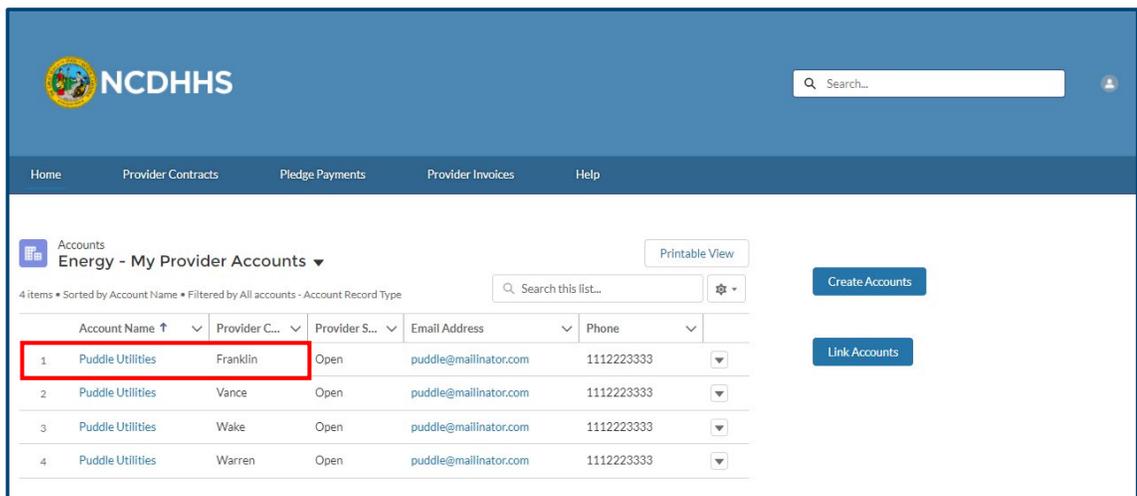
9. The provider status for your account is now **OPEN**.

10. Click **SUBMIT PROVIDER ACCOUNT** to finish submitting your enrollment application.

11. A **SUBMIT PROVIDER ACCOUNT** pop-up window will appear. Click **NEXT**.

12. Once you've submitted your enrollment application, you will immediately be prompted to submit a **PROVIDER CONTRACT** (vendor agreement). You must submit a provider contract for your enrollment application to receive approval.

13. In the **SUBMIT PROVIDER ACCOUNT** pop-up window, enter each field and verify that the form is filled in correctly with accurate information and click **NEXT**.

a. **Utility Service Provided**: Select the utility assistance program of the contract from the dropdown menu.

b. **Vendor Agreement Type**: Select the type of agreement for the contract you are entering from the dropdown menu.

c. **Start Date**: The beginning of the utility provider's agreement with the county.

   Note: The start date cannot be a date in the past.
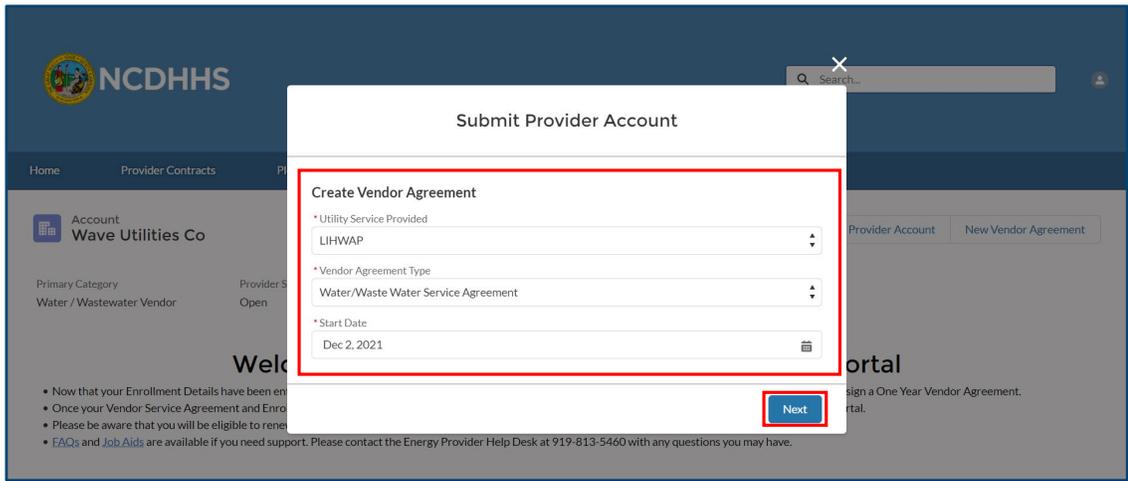
14. Read and review the terms and conditions of your vendor agreement with the county that is now displayed in the pop-up window.

15. Check the **I AGREE TO THE TERMS & CONDITIONS** box at the bottom of the screen and click **SUBMIT**.
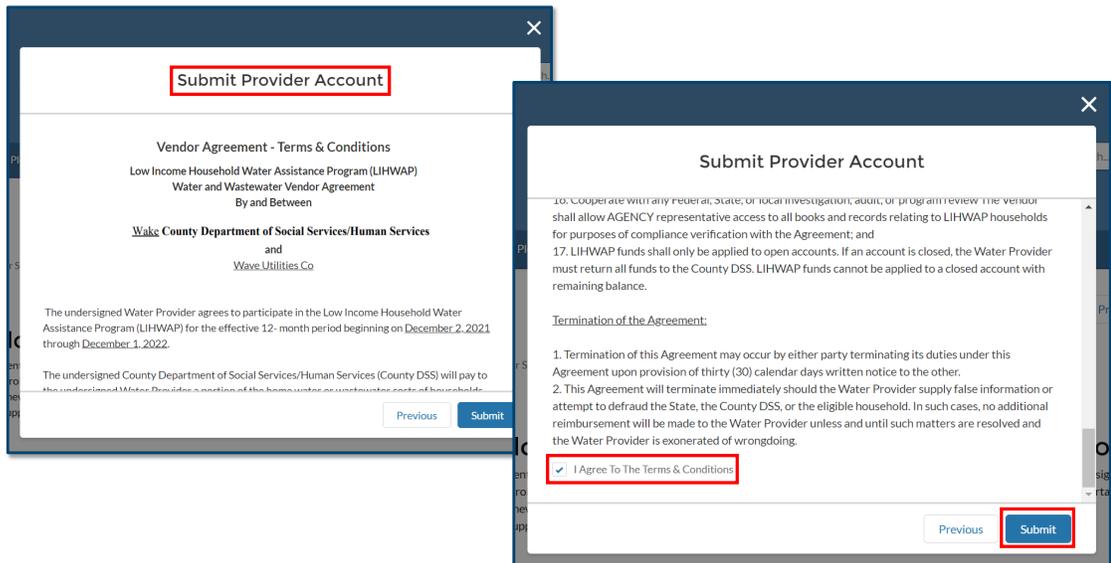
16. Click **FINISH.**
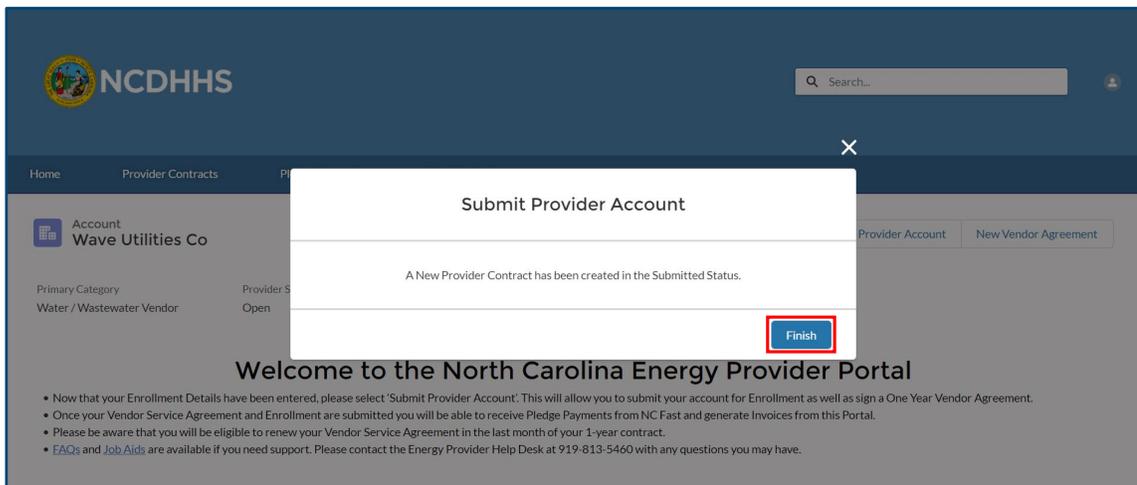
17. If the Contract Status is still in a **SUBMITTED** status (not yet activated by the State Information Support user), changes can still be made. Please see the **VIEW & EDIT PROVIDER CONTRACTS** section of this job aid for more information.

18. Your provider enrollment and vendor agreement will now wait for approval and activation from a State Information Support user.

    Notes: You will receive several automated email reminders throughout the process including:

    - When you submit an enrollment application.

    - When a State Information Support user updates your provider account to **ENROLLED** status.

    - When a State Information Support user updates your provider account to **CLOSED** status.

    - When a State Information Support user rejects your provider enrollment application.

    - When an active contract of yours is 30 days from expiring.

    - When an active contract of yours expires.

19. If you created multiple accounts for each of the counties you service, you must repeat steps 8 through 18 for each county's account to complete the enrollment application process for each one.

![NC FAST logo - North Carolina Families Accessing Services through Technology](image)

Logging In to Energy Provider Portal / Adding an Additional User

To log in to the Energy Provider Portal for the first time, you must either be creating the provider account, or you must have the **PROVIDER ACCESS CODE** to get associated to an existing provider account. For more information on creating the provider account, see the Submitting a Provider Enrollment Application section of this job aid.

1. To log in to the Energy Provider Portal, open your browser and navigate to https://energyproviderportal.nc.gov.

   Note: For the best user experience, use one of the recommended browser applications including: Google Chrome, Microsoft Edge Chromium, Apple Safari, or Mozilla Firefox.

2. Click the **ENERGY PROVIDER PORTAL NCID LOGIN** button.

Welcome to the North Carolina Energy Provider Portal

NCID-Energy

Need Assistance? You may call the Provider Help Desk at (919)813-5460, Monday through Friday 8AM - 6PM (excluding State observed holidays).

You will be redirected to NCID site to log in

3. Enter your NCID username and password, then click **NCID LOGIN**.

4. If this is the first time logging in to an existing provider account, you will be prompted to enter the provider access code for your existing provider location (this can only be located within the Energy Provider Portal on the Home Tab in the **DETAILS** section by someone who currently has access to that account).

   Note: You will only need to enter the access code the first time you are gaining access to your account. Each subsequent login will only require your NCID and password.

5. Verify that the account you are being added to is the intended account.

   Note: Only two people may have access to an account, and each of the two users will have identical rights within the portal.

6. Click **NEXT**.

7. If the Provider Access Code you entered belongs to a provider account that has multiple existing accounts for multiple counties, you will be prompted to choose which county's accounts you want access to. If you would like to select multiple counties (if available), hold the **CTRL** (Control) key on your keyboard, and click on the county name. Repeat this process for each county until you have highlighted each county you want to access. Once you've selected all the county's accounts you want to access, select **NEXT**.

8. You are now logged in to the Energy Provider Portal.

    Note: If you are a utility provider whose account was created as part of a data load and you are logging in to the Energy Provider Portal for the first time, you must enter your **PRIMARY CONTACT**, and **EMAIL ADDRESS** information in your account details. For more information on how to edit your account details, please see the Update Provider Account Details section of this Job Aid.

9. If you receive a **SINGLE SIGN-ON ERROR** message, close all instances of your browser and attempt to log in again. If unsuccessful, attempt to log in using Incognito mode, or restart your computer
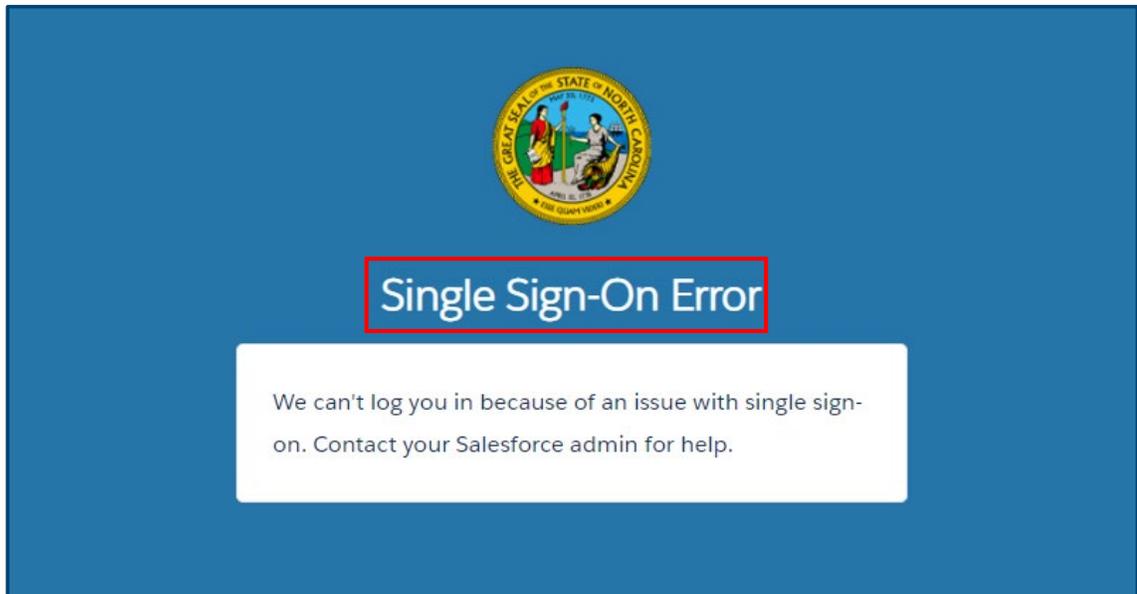
Navigating the Energy Provider Portal

Upon logging in to the Energy Provider Portal, utility provider users will be taken to the home screen. From here, you will be able to view a summary of relevant information as well as navigate to specific records that require your attention.

1. The first thing you will see upon logging in to the Energy Provider Portal is the **HOME** tab. This tab can be accessed at any time by clicking on **HOME** on the **NAVIGATION BAR**.

   Note: If you have access to multiple accounts, clicking on the Home tab will enable you to select the account in which you want to operate. Once you select the account, you will see the standard home screen.

2. The Home tab's default display will show multiple different tiles with a summary of your information including:

   a. **Account Information**: This tile displays a summary of your account information, with additional information shown on the **DETAILS** tab. Included in the **DETAILS** tab is your provider **PROVIDER ACCESS CODE** which is used to grant access to your account to new users.

   b. **Provider Contracts**: This tile displays contract information for any current or past contracts entered into with the county.

c. **Related Contacts**: This tile displays the name, email, and phone number for each individual who has access to this provider account in the Energy Provider Portal.

d. **Pledge Payments**: This tile displays the most recent pledge payment records that you've viewed.

e. **Provider Invoices**: This tile displays the most recent provider invoices that you've viewed.

3. The next tab on the navigation bar is the **PROVIDER CONTRACTS** tab. The Provider Contracts Tab is where you can search for and view vendor agreement after

enrolling as a utility provider. The Provider Contract record contains information about the type of vendor agreement, the start and end date of the vendor agreement, and the terms of service.

4. The next tab on the navigation bar is the **PLEDGE PAYMENTS** tab. The Pledge Payments tab contains records of each individual payment allocation (the one-time dollar amount of assistance that has been approved) to be paid to the utility provider on behalf of an individual resident. In addition, each pledge payment record links to any corresponding Provider Invoice.

5. The next tab on the navigation bar is the **PROVIDER INVOICES** tab. The Provider Invoices tab is how you navigate to invoice records, which show the amount the utility provider is charging the county for an individual's utility usage, any past due amount, and a link to the corresponding pledge payment record.

6. The final tab on the navigation bar is the **HELP** tab. On this tab, you will see some answers to frequently asked questions, as well as a button where you can download this **JOB AID**.

Update Provider Account Details

In the event that you need to update the basic account information (e.g., contact information, account name, etc.) for your utility provider account, the change will not need to be re-approved by a State Information Support user. Certain fields will not be editable by you without calling the Help Desk.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME** tab.

2. At the top of the screen, click the **EDIT** button, or select the **DETAILS** tab and click on any pencil icon.

   Notes: There are several important factors to keep in mind when editing account details:

   - If you created multiple provider accounts during your enrollment application for the multiple counties where you provide service, they will all appear with the same provider name, primary contact, and email address. You may use the **EDIT** function to change the details of the individual accounts as you desire.

   - If your Primary Contact field and Email Address field appear as blank, your utility provider account was created through a data load and you must enter information in these fields to properly sync with NC FAST Portal.

3. Make any necessary changes and click **SAVE**.

   Note: If the **PROVIDER STATUS** field shows that your provider enrollment application is still in **SUBMITTED** status, you will be able to edit any field except for **FEIN**, **SSN**, or **PROVIDER ACCESS CODE**. If the enrollment application has already been approved, and your **PROVIDER STATUS** shows as **ENROLLED**, then you will not be able to edit the **PRIMARY CATEGORY, FEIN, SSN, COUNTY,** or the **PROVIDER**

ACCESS CODE fields. To make edits to any of those fields, you will need to contact the Energy Provider Help Desk at 919-813-5460.
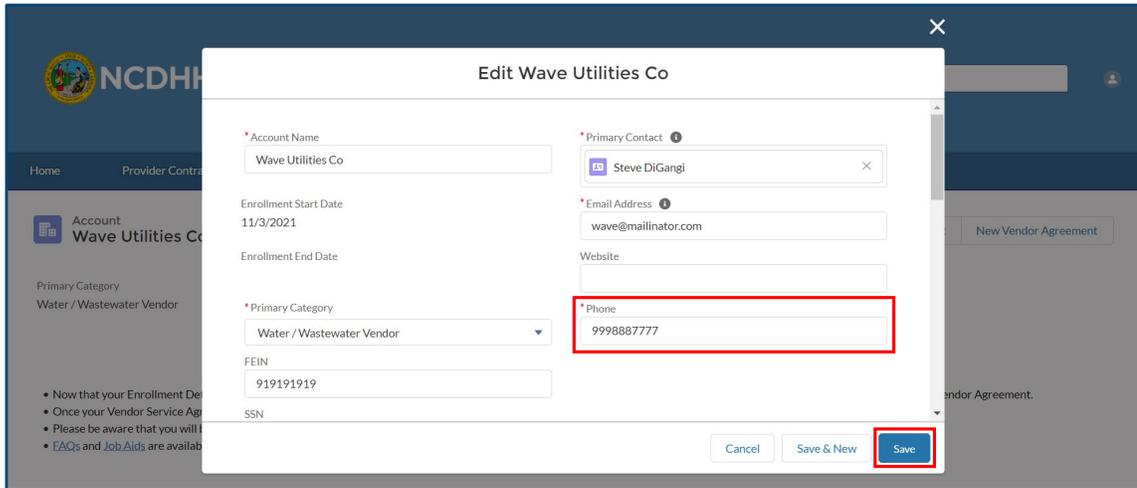
4. A green success banner will appear at the top of the screen, letting you know that the change was successfully made.

Create New Provider Contract (Vendor Agreement)

There are several reasons that may require you to create and submit a new contract (vendor agreement) for approval. For example, you may need to submit a new contract if your existing contract is set to expire or is closed by the county. Alternately, you may need to submit a new contract for a different utility than was submitted with your initial contract (e.g., water/wastewater vs heating/cooling).

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME** tab.

2. Click the **NEW VENDOR AGREEMENT** button on the top right of the screen to open a **NEW VENDOR AGREEMENT** pop-up window.


3. Enter the contract details and click **NEXT**.

   a. **Utility Service Provided**: Select the utility assistance program of the contract from the dropdown menu.

   b. **Vendor Agreement Type**: Select the type of agreement for the contract you are entering from the dropdown menu.

   Note: If you already have an existing provider contract of the same vendor agreement type, you must wait until you are within 30 days of its expiration before submitting a new provider contract.

   c. **Start Date**: The beginning of the utility provider's agreement with the county.

Note: The start date cannot be a date in the past, and provider contracts are defaulted to 12 months. If a contract already exists with the same service and vendor agreement type for the 12-month period starting on the entered start date, you will receive an error message.
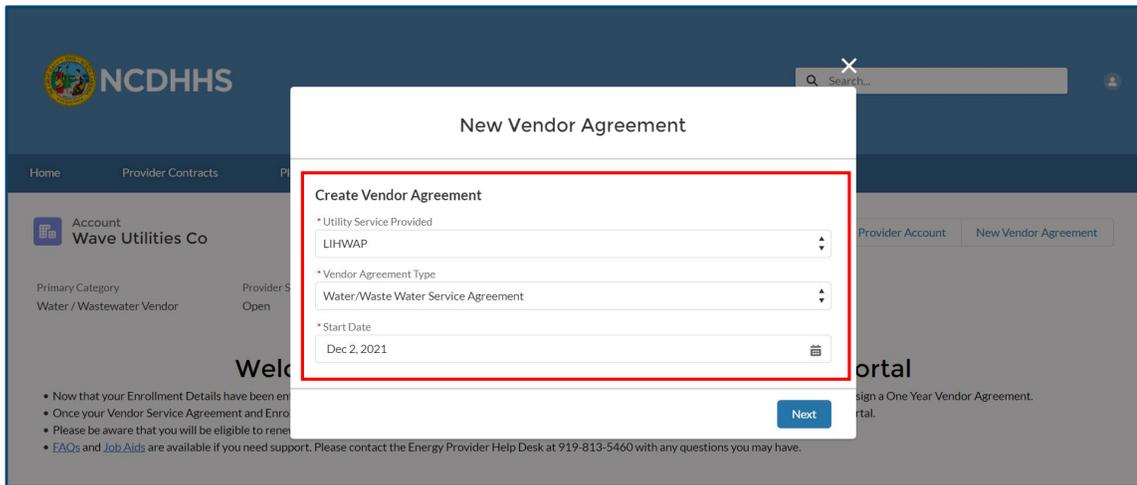
4. Read and review the terms and conditions of your vendor agreement with the county.

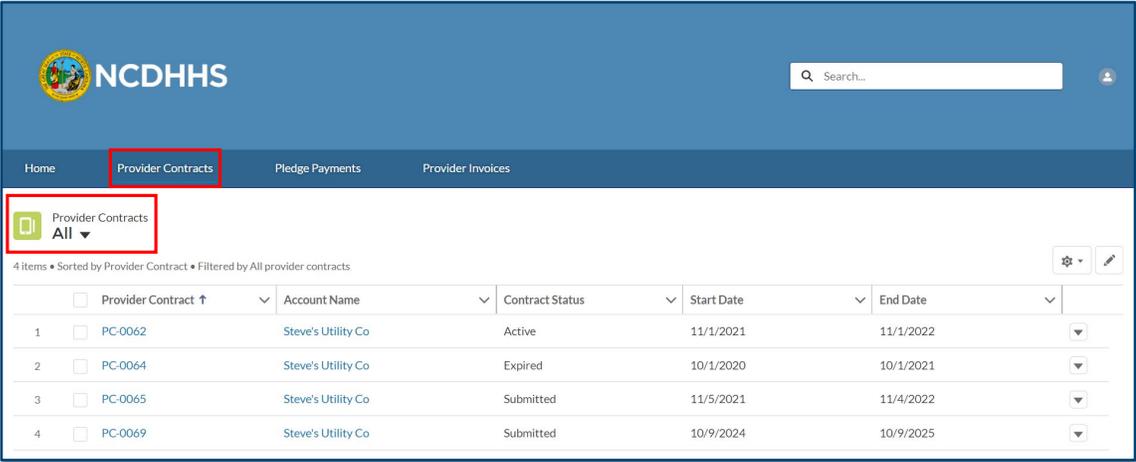5. Check the **I AGREE TO THE TERMS & CONDITIONS** box at the bottom of the screen and click **SUBMIT**.
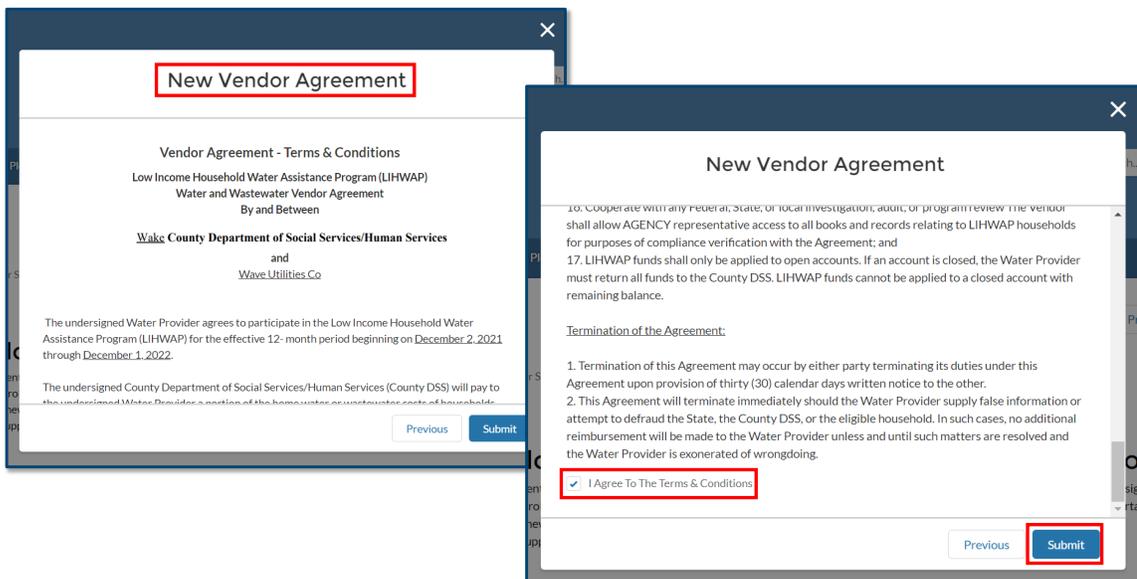
6. Click **FINISH.**

View & Edit Provider Contracts

At any point, you may navigate to the **PROVIDER CONTRACTS** tab to review any past or present contracts you've made with the county.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME** tab.

2. Navigate to the **PROVIDER CONTRACTS** tab.

3. The default list view will show the most recent provider contracts that you have viewed.

4. From here, you may select a different list view by clicking the dropdown arrow and choosing a different list view.

    Note: After selecting a different list view, you can make that your default list view by clicking on the push pin icon.

5. Find the desired provider contract. You may search the list of provider contracts by using the search bar at the top right of the screen.

    Note: You cannot search by account name, start date, or end date. You can search by provider contract number, contract status, utility service provided, or vendor agreement type.

6. Click on the provide contract to view the following information:

   a. **Provider Contract:** The system-generated record number for the Provider Contract.

   b. **Account Name**: The name of the utility provider.

   c. **Utility Service Provided**: The utility assistance program of the contract.

   d. **Vendor Agreement Type**: The type of agreement for the contract.

   e. **Start Date**: The beginning of the utility provider's agreement with the county.

   f. **End Date**: The final date of the utility provider's agreement with the county.

   g. **Contract Status**: This field indicates whether the contract is currently submitted, activated, closed, or expired. When the contract reaches the end date, the contract status will automatically update to a status of **EXPIRED**.

   h. **Download as PDF**: This button is a downloadable PDF of the Terms & Conditions you agreed to when creating the new vendor agreement. Depending on your computer settings, this may open a new tab in your browser or begin a download to your Downloads folder.

   Note: Only contracts that are active may be downloaded.

7. If the provider contract shows a contract status of **SUBMITTED**, you may edit the vendor agreement by clicking on any **PENCIL** icon.

   Note: If the provider contract is already activated, you cannot make any edits. You must contact the Energy Provider Help Desk to have the provider contract closed, then you may re-submit a new provider contract with the corrected information.

8. Make any necessary edits to the provider contract and click **SAVE**.

   Note: You can only edit the **UTILITY SERVICE PROVIDED**, **VENDOR AGREEMENT TYPE**, or **START DATE** fields.

9. Confirm that the edits are reflected in the provider contract.

View Pledge Payments & Generate Invoices

When a North Carolina resident applies for and is accepted into a utility assistance program through NC FAST, the government determines and allocates a pledge payment amount, which is then sent to the Energy Provider Portal as a non-editable record. The pledge payment record will be associated to the servicing provider as well as the resident who receives assistance. You will then use that pledge payment to generate and submit one invoice to the county. The invoice will be processed by the county and subsequently paid by the county to you, the utility provider.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME** tab.

2. Navigate to the **PLEDGE PAYMENTS** tab.

3. The default list view will show the most recent pledge payment records that you have viewed.

4. From here, you may select a different list view by clicking the dropdown arrow and choosing a different list view.

   Note: After selecting a different list view, you can make that your default list view by clicking on the push pin icon.

5. You may also search the list of pledge payment records by using the search bar at the top right of the screen.

6. Find the desired pledge payment record, either by account holder's name, account number, or application reference number.

   Note: Since residents must apply for assistance on a per-bill basis, it is possible to see multiple results when searching for an individual if they have been approved for assistance more than once.

7. Click on the pledge payment record to view the following information:

   a. **Energy Provider**: The provider account who services the individual's utilities.

   b. **County**: The county where the service is provided.

   c. **Account Number**: The unique identifier of the North Carolina resident's utility assistance account.

   d. **Account Holder's Name**: The North Carolina resident who is receiving utility assistance.

   e. **Application Reference**: The unique identifier that corresponds to the individual's application for utility assistance.

   f. **Pledged Amount**: The maximum dollar amount of one-time assistance that has been approved by the government.

8. To create an invoice, click the **NEW** button in the **PROVIDER INVOICES** section at the bottom of the pledge payment record.

   Note: It is also possible for you to generate a new invoice for a resident by selecting **NEW** from the **PROVIDER INVOICES** tab, or from the **PROVIDER INVOICES** section of the Home tab. In the event that you generate an invoice in that manner, you will need to manually enter which pledge payment record the invoice will be associated to.

9. In the pop-up window enter the correct information into the fields:

   a. **Account**: The Energy Provider who is servicing the resident's utilities. Here, you will select your own Account.

   b. **Past Amount Due**: Amount of money not paid on time by the resident.

   c. **Current Amount Due**: Amount of money currently due for the resident's utility usage.

   d. **Pledge Payments**: A hyperlink to the pledge payment record that is associated to this invoice record. When you begin to generate the invoice from the pledge payment record, this field will be auto-populated with the associated pledge payment.

      Note: Residents apply for assistance on a per-bill basis, meaning that each pledge payment should have only **ONE** invoice associated to it.

   e. **Customer Name**: Name of the resident who receives utility assistance.

   f. **Account Number**: The unique identifier of the North Carolina resident's utility assistance account.

   g. **Service Address**: The home address where the resident receives utility assistance.

   h. **Service City**: The city where the resident receives utility assistance.

i. **Service State**: The state where the resident receives utility assistance (North Carolina).

j. **Service Zip Code**: The zip code where the resident receives utility assistance.
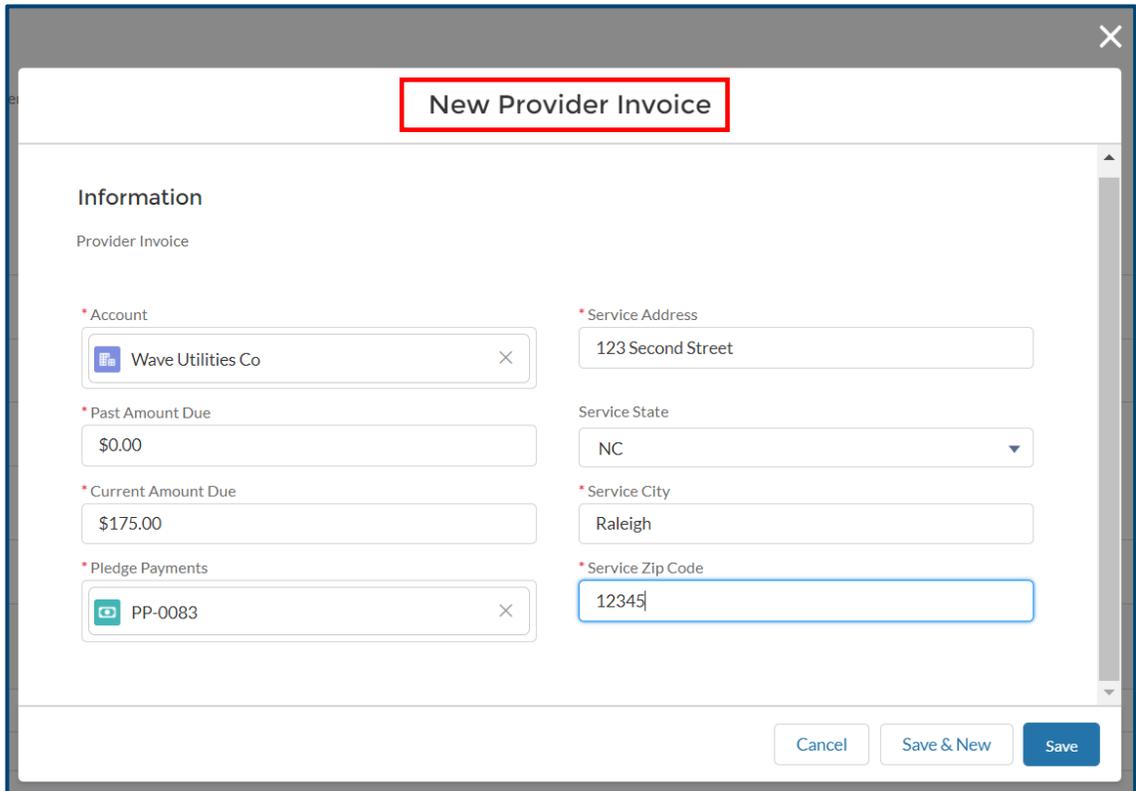
10. Click **SAVE**.

11. A green success banner will appear at the top of the screen, letting you know that the invoice was successfully generated for that pledge payment.

Locate, Review, & Edit Invoices

In some cases, you may need to locate, review, and edit an invoice for a specific resident.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME** tab.

2. Navigate to the **PROVIDER INVOICES** tab.

3. The default list view will show the most recent invoice records that you have viewed.

4. From here, you may select a different list view by clicking the dropdown arrow and choosing a different list view.

   Note: After selecting a different list view, you can make that your default list view by clicking on the push pin icon.

5. You may also search the list of invoice records by using the search bar at the top right of the screen.

6. Find the desired invoice record.

Note: You cannot search by current amount due, past amount due, total amount due, or by customer name. You can search by customer address, zip code, or the invoice record number.

7. Click on the invoice record to review the details of the invoice.

8. To edit the invoice, click on any **PENCIL** icon.

9. Make any necessary edits to the invoice and click **SAVE**.

Note: Do **NOT** generate a second invoice associated to a pledge payment. If there is an error on the invoice, always use the **EDIT** functionality to correct for the error.
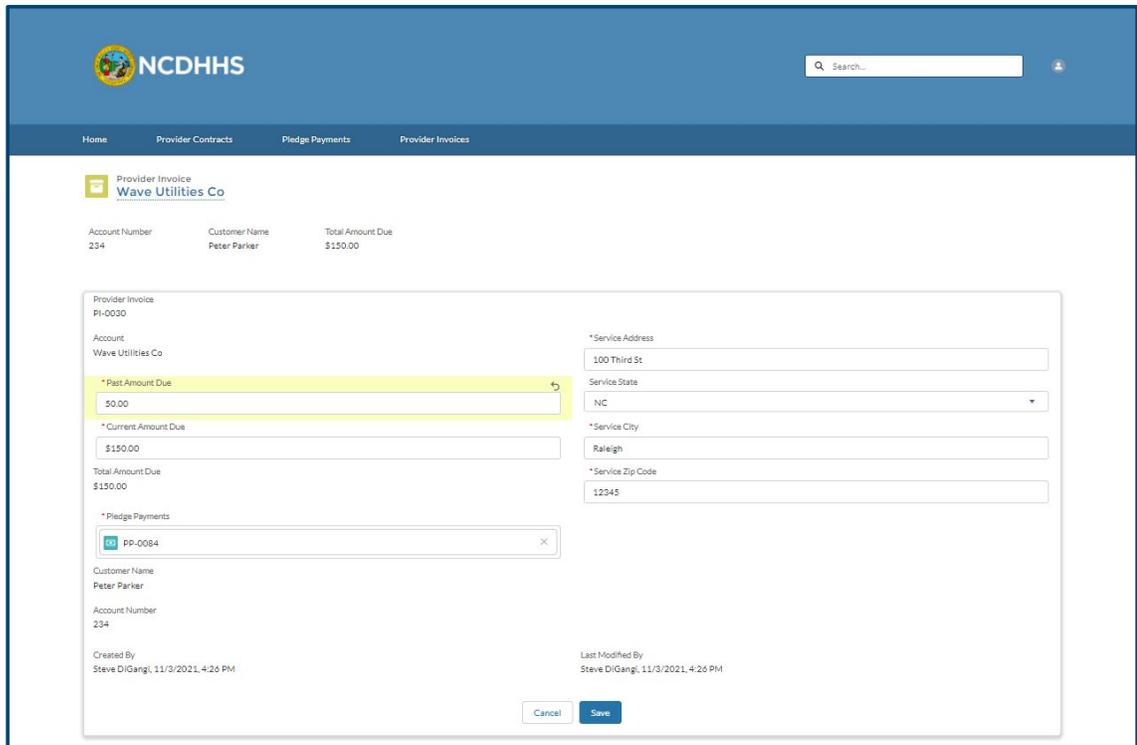
10. Confirm that the edits are reflected in the invoice record.

Create Additional Provider Accounts With The Same NCID

Utility providers that service multiple counties must have one Energy Provider Portal account for each county. To create multiple accounts during the enrollment application process, please refer to the Submit a Provider Enrollment Application portion of this job aid.

If you already have an existing Energy Provider Portal account you may also create an additional one for another county that you service.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME** tab.

2. If you already have multiple accounts, you will see a screen allowing you to select which account to operate in. Select the **CREATE ACCOUNTS** button.

3. If you only have one existing account when you log in, you will select **CREATE NEW PROVIDER ACCOUNTS** from the drop down menu in the upper right hand side of the screen.

4. A **CREATE NEW ACCOUNTS** pop-up window will open, prompting you to fill in the enrollment application details for the new provider account.

5. Fill in all the details of the new provider accounts to enroll. Use the scroll bar in the **County** field to locate each serviced county you where you want to create a new provider account. Hold the **CTRL** (Control) key on your keyboard, and click on the

county name. Repeat this process for each county until you have highlighted each county you want to have an Energy Provider Portal account.

Note: The details such as Provider/Company Name, Billing Address, or Email Address of the newly created account do not need to match your existing provider account, however your FEIN or SSN will automatically be matched to your existing account.

6. Click **NEXT** to bring up the confirmation screen.

7. Review the county/counties that you've selected and click **NEXT**.
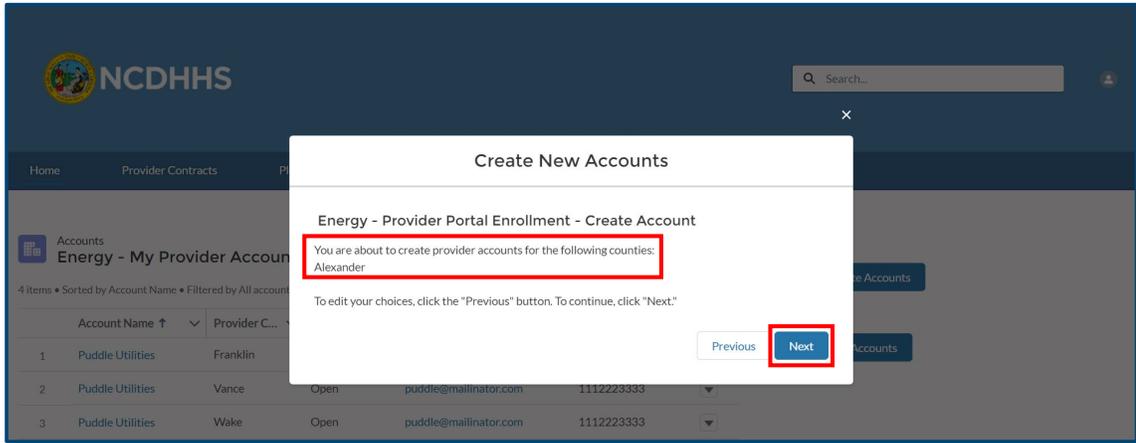
8. Click the **HOME** tab and confirm that the newly created account is now an available option.
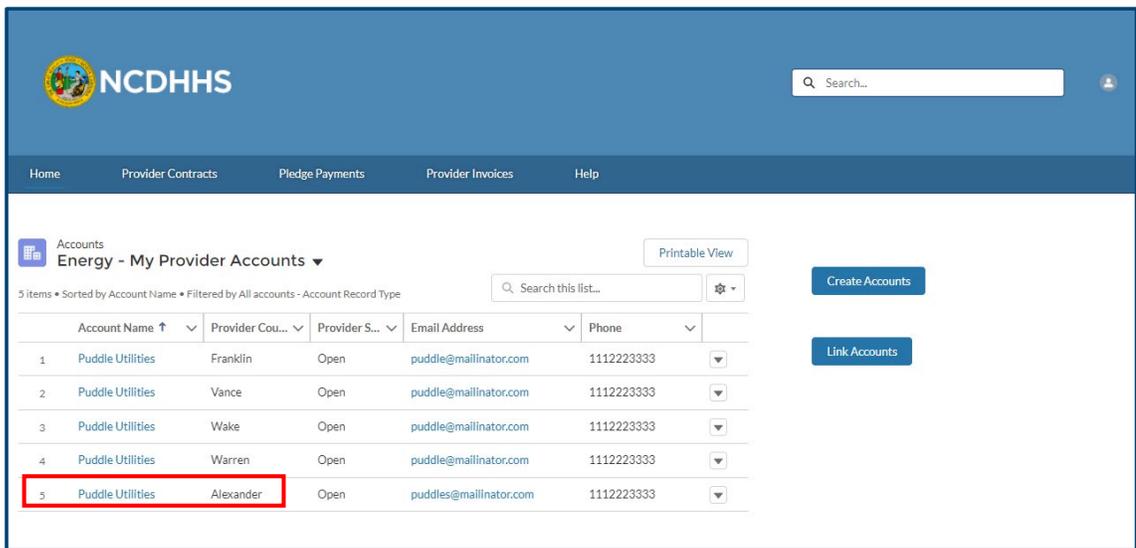
9. The new provider account will be in **OPEN** status and will need to be submitted along with a vendor contract before being able to generate invoices.

Link an Existing Provider Account To Your NCID

Utility providers that service multiple counties must have one Energy Provider Portal account for each county. If multiple accounts have already been created for your company and you want to consolidate access to your NCID, you have the option to do so for some or all of the accounts with the same FEIN/SSN.

1. Log in to the Energy Provider Portal using your NCID, which will land you on the **HOME** tab.

2. If you already have multiple accounts, you will see a screen allowing you to select which account to operate in. Select the **LINK ACCOUNTS** button.


3. If you only have one existing account when you log in, you will select **LINK NEW PROVIDER ACCOUNT(S)** from the drop down menu in the upper right hand side of the screen.

4. A **LINK NEW PROVIDER ACCOUNT(S)** pop-up window will appear.

5. If there are any existing Energy Provider Portal accounts with the same FEIN or SSN, you can select which county or counties accounts you want to add to your NCID access. If you would like to select multiple counties, hold the **CTRL** (Control) key on your keyboard, and click on the county name. Repeat this process for each county until you have highlighted each county you want to access.
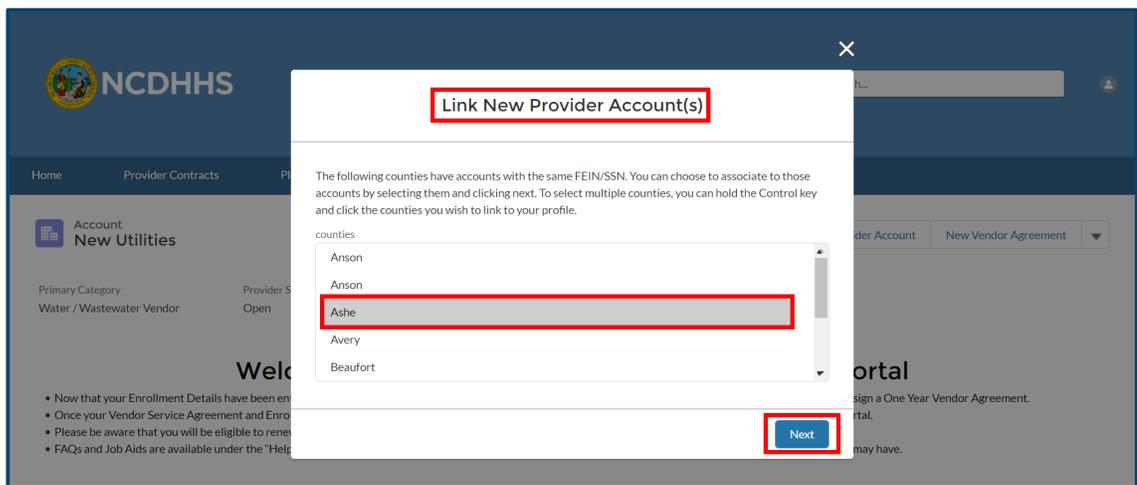
6. Click **NEXT** to add access to the account(s).

7. Click the **HOME** tab to confirm that you now have access to the account.
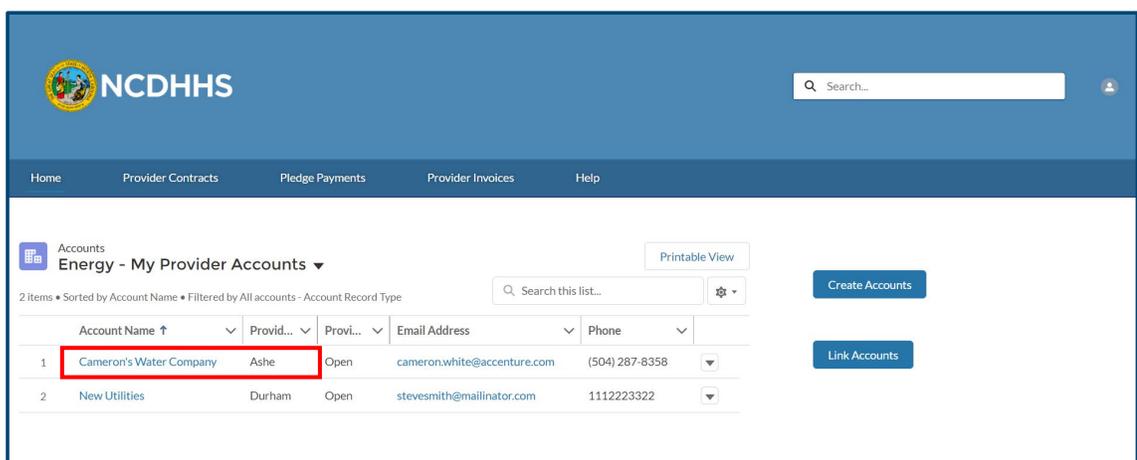
Additional Resources & Help

For more information on how to use the Energy Provider Portal, please review the posted training materials within the Energy Provider Portal.

If you need additional help, please contact the **ENERGY PROVIDER HELP DESK** at 919-813-5460 Monday through Friday between 8:00 am ET and 6:00 pm ET.