



Role	All
Implementation Date	8.15.2025

Contents

Customer Notifications	1
Contractor Notifications	6

Customer Notifications

Criteria	Subject Line	Text
Customer Starts Online Application Process	Welcome	Welcome to Slipstream's Energy Finance Solutions lending portal, VelocityGO! With our lending portal it's easy to access, review or update your loan information twenty-four hours a day, seven days a week. You have stated the online application process. If you have not submitted your application, log back in to complete it. Click the button or link to return to your application at any time. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at (800) 861-1929.
When main borrower adds an additional Borrower/Guarantor to an Online application	You've been added as a additional applicant on an Online Application	You have been added as an additional applicant to a request for financing with Slipstream Energy Finance Solutions (EFS). To fully process the application, we need some personal information from you. Please access our secure online portal, VelocityGO to provide your personal information including address, date of birth, and social security number. In some cases, you may need to provide income information. You will receive a welcome email from slipstream.donotreply@slipstreaminc.org with a link to set up a new account in our system. Please follow the link in that email to enter requested information. If you believe you have received this email by mistake, or if you have any questions, give us a call directly at (800) 861-1929.
When a Contractor submits an application on behalf of a Customer	Notification of Submission to Slipstream	Welcome to Slipstream Energy Finance Solutions (EFS)! We received an application that was submitted on your behalf by your contractor, and we are processing the application. EFS will provide additional information regarding eligibility and notify of your application status as soon as it is processed. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to contact us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at 800-861-1929.

Offer is generated	EFS Loan Preapproval Confirmation - [Customer Last Name] - [Loan Number]	Congratulations! Your Slipstream Energy Finance Solutions (EFS) loan application has been preapproved. If you applied online, you can login to the Customer Portal to learn about the next steps in the loan process and to upload any required documents in support of your loan application. You may also download your pre-approval letter by navigating to the download documents section of the To-Do List. If you submitted a paper application, or your contractor submitted the application on your behalf, contact your contractor for next steps. If you wish to manage your application online and do not have a login, please send an email to efs@energyfinesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application. We are here to answer any questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at 800-861-1929. Best Regards, The Slipstream Energy Finance Solutions Team
Customer portal applications where 10 days have elapsed since the offer was generated and has not been selected yet	Please select an offer on your Slipstream Application	Congratulations, your Slipstream Energy Finance Solutions (EFS) loan is preapproved. We are pleased to provide you with the opportunity to select the loan offer that best meets your needs. Please login to our portal to view your options and select the one that you prefer. Once you have made a selection, your loan will be able to advance through the preapproval process. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at (800) 861-1929.
Status changes to "Pending"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with Slipstream Energy Finance Solutions (EFS) has changed. More information may be needed before we can issue a decision regarding your loan request. If you applied online, you can login to the Slipstream EFS portal and navigate to the To Do List on the Dashboard to see what information is required. If you submitted a paper application, or your contractor submitted the application on your behalf, contact your contractor for next steps. If you wish to manage your application online and do not have a login, please send an email to efs@energyfinesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at (800) 861-1929.
Status changes to "Subsidy Pending"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your incentive application with Slipstream Energy Finance Solutions (EFS) has changed to Pending. More information may be needed before EFS can issue a decision regarding your subsidy request. If you applied online, you can login to the EFS portal to see what information is required. If you submitted a paper application, or your contractor submitted the application on your behalf, contact your contractor for next steps. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at (800) 861-1929.

Status changes to "Subsidy Qualified"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your incentive application with Slipstream Energy Finance Solutions (EFS) changed to Subsidy Qualified. If you applied online, you can login to the Slipstream portal to see if any additional information is required. If you submitted a paper application, or your contractor submitted the application on your behalf, contact your contractor for next steps. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at (800) 861-1929.
Pre-Approval Expiration	PreApproval Expiration – Customer	Your Slipstream Energy Finance Solutions (EFS) loan preapproval is about to expire. Please submit the remaining items needed to prevent the preapproval from expiring. If you applied online, you can login to our website to view the borrower conditions needed and upload the documents requested. If you submitted a paper application, you should have received an email from Slipstream EFS with a letter documenting the missing information. You can mail or fax the missing information to Slipstream EFS. If you wish to manage your application online and do not have a login, please send an email to efs@energyfinesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at (800) 861-1929.
Applicant Placeholder Added	New Placeholder Added	After a review of your Slipstream Energy Finance Solutions (EFS) application, we have determined additional documents are needed from you before your application can receive final approval. If you have an account set up, you can login to learn what additional information is required and upload the documentation needed to support your application. If you do not have an online account, please contact EFS to identify what is needed. If you wish to manage your application online and do not have a login, please send an email to efs@energyfinesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at (800) 861-1929.
Waiting on Contractor	Customer info complete, pending contractor docs	Thank you for submitting the required documentation for your loan with Slipstream Energy Finance Solutions (EFS). At this time, no further information is required of you, only of your contractor. Upon receipt of the required documentation from the contractor, your loan will go through the final approval process. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at (800) 861-1929.

Status changed to "Approved"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with Slipstream Energy Finance Solutions (EFS) has changed. Your loan request has received final approval! Please look for an email from DocuSign and follow the instructions provided to sign the document electronically. If you applied online, you can login to the Customer Portal to download your approval letter. You will find your letter by navigating to the download documents section of the To-Do List. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect us. Log into the portal and leave a comment, send an email to efs@energyfinancesolutions.com or give us a call at 800-861-1929.
Sign Loan Docs 10 days	Following on Loan Documents Sent 10 days ago	Your loan has received final approval and is awaiting your signature to finalize the documents. Please look for the email from DocuSign with instructions on how to sign your documents electronically. If you wish to manually sign your documents, please send an email to efs@energyfinancesolutions.com to request a set to be sent to you for manual signature. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinancesolutions.com or give us a call at (800) 861-1929.
Sign Loan Docs 20 Days	Following on Loan Documents Sent 20 days ago	Your loan has received final approval and is awaiting your signature to finalize the documents. Please look for the email from DocuSign with instructions on how to sign your documents electronically. If you wish to manually sign your documents, please send an email to efs@energyfinancesolutions.com to request a set to be sent to you for manual signature. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinancesolutions.com or give us a call at (800) 861-1929.
Approval Expiration	Approval Expiration – Customer	Your Slipstream Energy Finance Solutions (EFS) loan approval is about to expire. Please submit the remaining items needed to prevent the approval from expiring. If you have an online account with us, you can login to view the items needed and upload document(s) requested. If you do not have an online account, please contact Slipstream EFS to identify what is needed. If you wish to manage your application online and do not have a login, please send an email to efs@energyfinancesolutions.com to request a login. Include your email address, name, and mailing address to connect your new account to your application. We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinancesolutions.com or give us a call at (800) 861-1929.

Status changed to "Paid"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with Slipstream Energy Finance Solutions (EFS) has changed. The loan amount, as indicated in your documents, has been paid in full to your contractor. If you applied online, you can login and download your Goodbye Letter and Privacy notice containing information regarding the due date of your first loan payment and your loan servicer. Find your letters by navigating to the documents section of the To-Do List. If you submitted a paper application or your contractor submitted the application on your behalf, you will be emailed your Goodbye Letter and Privacy Notice. Thank you for working with EFS! We are here to answer questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at 800-861-1929. Best Regards, The Slipstream Energy Finance Solutions Team
Status changed to "Withdrawn"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with Slipstream Energy Finance Solutions (EFS) has changed. Your application has been withdrawn. This change may have occurred per your request or may indicate that your loan application has expired. For more information, or if you would like to reactivate your application, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at (800) 861-1929.
Status changed to "Declined"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of your application with Slipstream Energy Finance Solutions (EFS) has changed. EFS was unable to approve your loan request. For information regarding the factor(s) that led to this decision, Please login to the EFS portal or refer to the Adverse Action letter. You may also download your Adverse Action Letter by navigating to the download documents section of the To-Do List. We are here to address any questions or concerns regarding your application. If you need assistance, you have multiple ways to connect with us. Log into the portal and leave a comment, send an email to efs@energyfinesolutions.com or give us a call at 800-861-1929.
Customer clicks the "Forgot Password" button on portal	Forgot Password	Per your request, we have sent you a link to reset your password for Slipstream Energy Finance Solutions (EFS).
Customer successfully updates password	Password successfully changed	Your password has been reset for Slipstream's Energy Finance Solutions. To reset your password, visit https://slipstream2.nportal.visualforce.com/apex/PortalForgotPassword, or contact your financial institution at (800) 861-1929. Thanks!

Contractor Notifications

Criteria	Subject Line	Text
When offer is generated	EFS Loan Preapproval Confirmation - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed with Slipstream Energy Finance Solutions (EFS). The loan application has been preapproved. Please login to the VelocityGO contractor portal to learn about the next steps in the loan process and to upload any required documents to receive final approval. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Status changes to "Pending"	EFS Loan Preapproval Confirmation - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. This application requires further review by Slipstream Energy Finance Solutions (EFS) staff, which will be completed within one business day from the date that the customer submitted the application. You will receive an email when the status of the application is updated. For more information, please login to the VelocityGO contractor portal. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response. Thank you for your patience and we will be in touch soon.
Pre-Approval Expiration	PreApproval Expiration – Contractor	The Slipstream Energy Finance Solutions (EFS) loan preapproval for your customer, ((Insert Primary Borrower Full Name)), is about to expire. Please login to the VelocityGO contractor portal to view the items needed and upload any required documents designated as conditions to be provided by the contractor. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response
Contractor Project Approval/Contact	Pending Work Scope Documents	In order to fully approve the loan for your customer, <<insert primary applicant name>>, Slipstream Energy Finance Solutions (EFS) must receive all required work scope documentation. Please login to the VelocityGO contractor portal and upload all the required work scope documents. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Subsidy status changed to "Subsidy Pending"	Status Change for Slipstream Energy Finance Solutions Application - [Customer Last Name]	The status of the incentive application for your customer [CUSTOMER FIRST AND LAST NAME], has changed to [Subsidy Status] with Slipstream Energy Finance Solutions (EFS). Please login to the VelocityGO contractor portal to see if any additional information is required. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Subsidy status changed to "Subsidy Qualified"	Status Change for Slipstream Energy Finance Solutions Application - [Customer Last Name]	The status of the incentive application for your customer [CUSTOMER FIRST AND LAST NAME], has changed to [Subsidy Status] with Slipstream Energy Finance Solutions (EFS). Please login to the VelocityGO contractor portal to see if any additional information is required. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Status changed to "Approved" if using e-sign	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed with Slipstream Energy Finance Solutions (EFS). The loan request has received final approval! Your customer has opted to use electronic signature and will receive a separate email from DocuSign with instructions for signing the document electronically. You can view the status of the documents on the loan Document Manager on the VelocityGO contractor portal. Please login, click on the request, and then click on Documents. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.

Status changed to "Approved" if not using e-sign	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed with Slipstream Energy Finance Solutions (EFS). The request has received final approval! If your customer applied online, documents will be emailed to them to review and sign. If your customer did not apply online and you have directed Slipstream Energy Finance Solutions to mail documents, they have been sent. Please login to the VelocityGO contractor portal and navigate to the Document Manger section of the file to see the status of the documents. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Status changed to "Loan Docs Accepted"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed with Slipstream Energy Finance Solutions (EFS). Loan documents have been received and accepted. You may schedule the work in accordance with program guidelines. If the customer has multiple loans, please be sure loan documents are also completed for those files. Please have the installation completed and all final documentation returned to EFS at least 10 business days prior to the expiration date of the loan. Please login to the VelocityGO contractor portal Solutions and navigate to the loan for more details. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Payment Type field on Disbursement changes to "Advance Payment"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed with Slipstream Energy Finance Solutions (EFS). An Advance Payment has been made to you. Please login to the VelocityGO contractor portal and navigate to the loan for more details. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Approval Expiration	Approval Expiration – Contractor	The Slipstream Energy Finance Solutions (EFS) loan approval for your customer, ((Insert Primary Borrower Full Name)), is about to expire. Please login to the VelocityGO contractor portal to view the items needed and upload any required documents designated to be provided by the contractor. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Advance Pay 120 days	Status Change for EFS Loan Application	You received an advance payment of loan proceeds on <insert advance payment date here> for <insert primary borrower name>. This project must be completed within 180 days of receiving payment or the money must be returned unless an extension has been approved. This is a reminder that you must submit the completion for this project by <insert advance payment date +180 here>, but no later than 2 business days prior to the loan expiration date. If you would like to request an extension, please submit an email to extensions@slipstreaminc.org with a detailed explanation and the date you expect to be able to submit all the completion documentation. If the approval expiration date precedes the advance payment expiration date, the project must be completed at least 2 business days prior to the approval expiration date. The approval expiration date for this loan is <insert approval expiration date here>. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Advance Pay 150 days	Status Change for EFS Loan Application	You received an advance payment of loan proceeds on <insert advance payment date here> for <insert primary borrower name>. This project must be completed within 180 days of receiving payment or the money must be returned unless an extension has been received and approved. This is a reminder that you must submit the completion for this project by <insert advance payment date +180 here>. If you would like to request an extension, please submit an

		email to extenstions@slipstreaminc.org with a detailed explanation and the date you expect to be able to submit all the completion documentation. If the approval expiration date precedes the advance payment expiration date, the project must be completed by the approval expiration date. The approval expiration date for this loan is <insert approval expiration date here>. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response
Contractor Completion	60 Days since Project Installation	In order to close the Slipstream Energy Finance Solutions (EFS) loan for <<insert primary borrower name>> the installation must be completed, and the completion paperwork must be received and accepted by EFS at least two business days prior to the loan expiration date. Please upload the documentation through the VelocityGO contractor portal as soon as possible to avoid payment delays for this loan. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Loan status changed to "Withdrawn"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed with Slipstream Energy Finance Solutions (EFS). The loan application has been withdrawn. This change may have occurred per customer request or may indicate that the loan application has expired. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Loan status changed to "Declined"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer [CUSTOMER FIRST AND LAST NAME], has changed. Slipstream Energy Finance Solutions (EFS) was unable to approve the loan request. If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.
Loan status changed to "Paid"	Status Change for EFS Loan Application - [Customer Last Name] - [Loan Number]	The status of the application for your customer has changed with Slipstream Energy Finance Solutions (EFS). The loan amount, as indicated in the documents, has been paid in full to you. Please login to the VelocityGO contractor portal and navigate to the loan for more details. Thank you for working with Slipstream Energy Finance Solutions! If you have any questions regarding this application, log into VelocityGO and leave a comment on this file for the fastest response.