Validation Guide (IDs)

WIKI OVERVIEW

- **Wiki Purpose:** Establish and implement a streamlined validation process adhering to underwriting criteria, ensuring accurate review and approval/rejection of Identification Guide revisions based on stringent verification protocols.
- **Wiki Owner:** Joseph Canaan
- **Validity:** n/a

Approval Requirements for the Validation Guide (IDs)

Follow the Underwriting Criteria (Mainstream Valid Rules)

Process to review and approve/reject the Validation Guide (IDs)

1. Open the following link to see the pending signer and cosigner ID revision.
2. Visualize only the Top priority projects by activating the operator "Only show top priority projects".
3. Select the option "Signer info" or "Cosigner info" in operator Select Doc Type in the platform.
4. Open the Identification document by clicking on the "Go to Doc" button.
5. Check the information on the Ops platform is valid (according to the previous section of this wiki) and that it matches exactly the information on the submitted ID image.
6. Create the following custom items in the lead page:
   - "Previously Installed Photovoltaic Information"
   - "Calculo de Planeación"
   - "Comprobante de no adeudos"
7. If everything is correct, approve. If not reject the document with the corresponding feedback for the EE.

Revision #15
Created 23 September 2023 18:27:14 by Hector Vargas
Updated 16 January 2024 19:12:02