

## Customer Referrals to Assisted Home Performance with ENERGY STAR® and EmPower New York

These guidelines cover referrals of households who have an income below 60% of State median (i.e., HEAP eligibility), and who are otherwise eligible for services from both EmPower New York (EmPower) and Assisted Home Performance with ENERGY STAR (Assisted).

- 1.1 Referrals from Offices for the Aging and Weatherization agencies of HEAP eligible households must be to EmPower first.
- 1.2 GJGNY CBOs may only refer a household to one of the two programs.
  - 1.2.1 If the GJGNY CBOs can confirm that the household is HEAP eligible, the household will be referred to EmPower. If the household is served through EmPower, the GJGNY CBOs (who are approved to provide services through an EmPower New York Outreach Agreement) will be reimbursed \$20 for the referral.
  - 1.2.2 In all other instances the household will be referred to Home Performance with ENERGY STAR.
- 1.3 A household that applies to EFS for an Assisted Subsidy will be screened for income eligibility for EmPower. EFS may request that Honeywell verify whether the household has been found to be eligible for EmPower within the last 12 months, is currently in process with EmPower, or if the household has received prior EmPower services in excess of \$4,000.
  - 1.3.1 If the household is over income or ineligible for EmPower, EFS will process the Assisted application following the usual Assisted procedures and notify CLEAResult of Assisted eligibility.
  - 1.3.2 If EFS determines that the household is EmPower-eligible, EFS will:
    - Refer household to Honeywell for services through EmPower.
    - If an Assisted contractor was in contact with the household, EFS will provide the name of the contractor to Honeywell and Honeywell will assign EmPower work to this contractor when feasible and appropriate.
    - Notify CLEAResult to cancel audit reservation number by sending an email to [HPwES-Audit@clearresult.com](mailto:HPwES-Audit@clearresult.com).
- 1.4 Honeywell

- 1.4.1 If EmPower-eligible, Honeywell will send a letter to the household notifying them of the free services through EmPower. If no Assisted or EmPower application has yet been received, Honeywell will send an EmPower application to the household.
- 1.4.2 If the income eligible household cannot be served by EmPower, Honeywell will refer the household to Assisted by sending a letter with information about Assisted. EFS may invoice NYSERDA a \$20 fee for each household income-qualified by Honeywell.
- 1.4.3 If a household needs additional services, or is interested in measures beyond EmPower, Honeywell will, whenever possible, assign the work to a contractor working in both programs, and notify the contractor of the need to proceed with coordinated services according to “Coordination of Assisted Home Performance with ENERGY STAR® and EmPower New York” guidelines. If a contractor has established contact with the household through Assisted, Honeywell will, whenever possible, refer the work back to the original Assisted contractor.
  - If the contractor is not already active in EmPower, Honeywell and NYSERDA will fast-track their Contractor Agreement and related documents to EmPower. **This does guarantee acceptance**, but Program Staff will commit to a timely review.
  - If the contractor is unwilling to work through EmPower, the work will be reassigned.
  - If the household is found to be working independently with two different contractors in the two programs, Honeywell will work with CLEAResult to reassign as appropriate.