

Assisted Home Performance Operational Procedures Overview Guide to Paperwork and Procedures

Event	Description	Documentation	Submit to:
<p>A. Customer Intake and Application</p>	<p>The Combined Residential Application allows residents to apply for energy efficiency incentives through either Assisted Home Performance or EmPower New York. These programs are available for income-eligible owners and renters of 1-to-4 family homes and provide no-cost energy audits and incentives toward making your home more comfortable and energy efficient.</p>	<p>Setting up an account and applying online is the fastest way to apply for a no-cost audit and incentives. Once you set up an account you can save your in-progress application, submit your application and supporting documents for review, and check on your application status.</p> <p>The program will no longer except audit only applications initiated in Uplight. A customer must use the Combined Application to qualify for both incentives and an audit.</p>	<p>Customers can set up their accounts online and follow the on-screen instructions to apply.</p> <p>Or if customer's prefer paper applications, they can download a printable application and mail the application to 2 Wall Street, Albany NY 12205</p>
<p>B. Comprehensive Energy Assessment Report/develop eligible workscope</p>	<p>Follow Comprehensive Energy Assessment guidelines.</p>	<p>Enter Data into approved modeling software and print out Comprehensive Energy Assessment Report.</p>	<p>CLEARresult</p> <p>Customer's utility bills must be submitted, or if unobtainable, the Energy Usage History Waiver Form at time of work scope proposal.</p>

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C. Complete Sale	Negotiate workscope and prices for eligible measures.	Create a package in approved modeling software that includes the measures and prices that have been negotiated.	CLEAResult Upload workscope package (signed contract optional to upload at this time) to NY HP Portal and follow instructions as detailed in User Guide NY Home Performance Portal. If there are issues with the job submission, the project is rolled back in the Portal workflow.
	Customer to sign Certificate of Completion (CoC) after approval but before work begins.	Signed contract with customer and contractor signatures. Signed CoC Report with customer and contractor signatures.	
D. Workscope changes	Negotiate change in workscope with customer.	Create amended package in the approved modeling software that includes the changes in measures and prices.	CLEAResult Upload applicable documents including work scope contract and if applicable Change Order Form (Program Manual Section 8) to NY HP Portal and follow instructions as detailed in User Guide NY Home Performance Portal. CLEAResult Upload revised package to NY HP Portal or make appropriate changes in modeling software and follow instructions as detailed in the “Change Orders” section in User Guide NY Home Performance Portal. CLEAResult will issue a new approval.
		Change Order Form with customer and contractor signature. Refer to Program Manual Section 8.	
E. Complete Work	Complete work satisfactorily and perform necessary tests.	Update completion package with test out information.	CLEAResult Upload the signed CoC, signed contract, Post Installation Health & Safety Test Results, and completion package to the NY HP Portal and follow instructions as detailed in the “Final Project Submission” section of the User Guide NY Home Performance Portal. CLEAResult approves Completion or contractor is rolled back in Portal workflow if there are issues with completion. CLEAResult also approves the project level contractor incentives and submits an invoice to NYSERDA for disbursement of funds to the contractor.
		Signed contract with customer and contractor signatures.	
		Signed CoC with customer and contractor signatures.	
		If applicable, update modeling tool with test out information. Flag improvements as ‘installed’.	