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Contractor Support Online Scheduling Tool

Meeting Agenda

- ✅ Terminology
- ✅ Accessing the Contractor Support Online Scheduling tool
- ✅ When should the Scheduling Tool be used?
- ✅ Booking Appointments
- ✅ Appointment Management
  - Rescheduling
  - Cancelling
  - Creating a New appointment
- ✅ Joining a Teams meeting

Speakers

Sarah Knoell, Program Consultant

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Terminology

1

Appointment/Booking: An interchangeable name for an appointment scheduled through the bookings tool.

2

Services: The type of booking/appointment.

- Our list of services and description can be found on Slide 4 and Slide 5 of this presentation.

Available Services

- ✅ **Virtual Quarterly Check-In:** Quarterly meeting to review Program participation, answer any questions you may have, review your pipeline and any open items.

- ✅ **NYHEP Workflow Assistance:** Review the NYHEP submission process.

- ✅ **NYHEP User Support:** Basic NYHEP support such as login assistance, user updates/new users, or general training.

- ✅ **Workscope Review Support:** Discuss a NYHEP Workscope Review, including send back reasons and resubmission questions.

- ✅ **Final Project Review:** Discuss a NYHEP Final Project Review, including send back reasons and resubmission questions.

- ✅ **Appliance Support:** Review substitution requests, issues with submitting invoices or other appliance related questions.

- ✅ **Invoice Payments:** Discuss Invoice Payment questions or check on the status of a payment.

- ✅ **Technical Assistance:** Review technical or building science questions related to an EmPower+ enrollment.

- ✅ **QA Report Review:** Review QA Inspection Results.

- ✅ **Programmatic Assistance:** Review Program rules and guidelines or general process questions.

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Available Services, cont.

- ✅ **Technical HVAC or Heat Pump Assistance:** Review technical HVAC or Heat Pump related questions.

- ✅ **Special Projects:** Discuss new or in-progress Special Projects.

- ✅ **Customer Concern Resolution Support:** Discuss a concern or review open items.

- ✅ **Technical Workscope Assistance:** Review technical or building science questions related to creating a workscope for an EmPower+ enrollment.

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Accessing the Contractor Support Online Scheduling Tool

✔ There are 3 ways you can access the Contractor Support Online Scheduling Tool landing page:

1. The Contractor Support webpage
2. Via an active or previous appointment confirmation email. (See Slide 11)
3. Via an active or previous appointment email that identifies who your appointment is/was with. (See Slide 10)
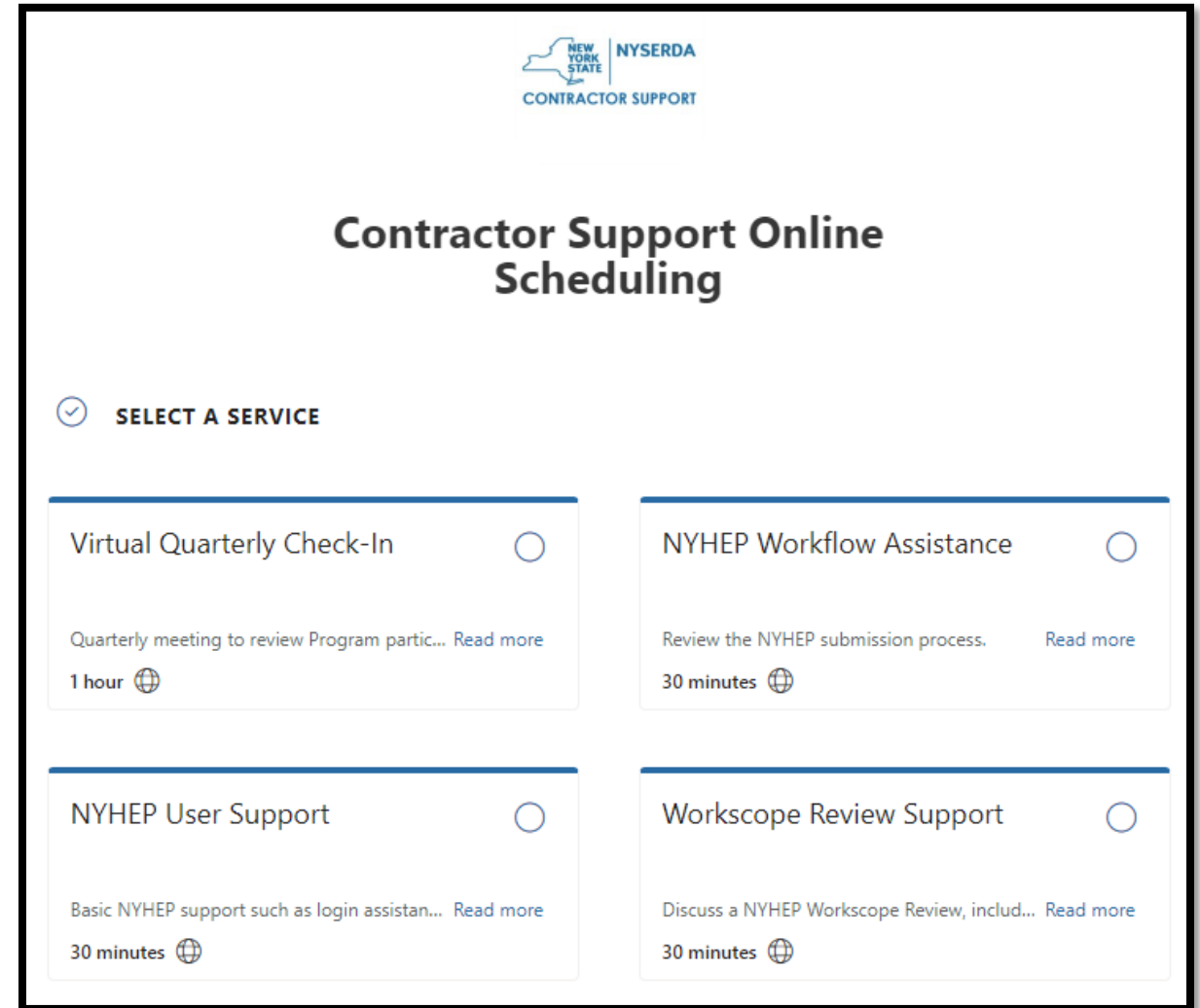
When should the Scheduling Tool be used?

- ✅ The purpose of the Scheduling Tool is to be able to set aside dedicated time with the right CLEAResult team member that can best assist you. These meetings are for *planned* programmatic or technical questions.

  - Example of when to use the Scheduling Tool: *You know that on Wednesday you're going to be working on the modeling of a complex enrollment that requires HVAC support.*

  - Example of when not to use the Scheduling Tool: *You have a quick question about an enrollment in real time.* In this scenario, you should call (800-284-9069) or email Contractor Support for immediate support.

- ✅ Each appointment has a set duration that should be met. If you want or need more time book an additional meeting.

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Booking Appointments

● The most frequently requested support services are visible without having to expand your view. To view all services, click the Show more services button.

● To view the full description of a service, click the Read more link. This will prompt a pop-up with the full description of service.

● Click the circle in the desired service tile, and then scroll down to input the date and time of the appointment that fits your schedule.

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Booking Appointments, cont.

- As you move down the screen you will be met with the ADD YOUR DETAILS and PROVIDE ADDITIONAL INFORMATION sections to book your appointment. All fields are REQUIRED.

- Enter your First and last name, your Email address, your Phone number, and additional information pertaining to the appointment. This could be an enrollment number, or a description of help needed on a Workscope.

- Click the Book button to secure your appointment.

- The Contractor Support Online Scheduling Tool page will refresh and provide a confirmation message when your booking is successful.

Booking Appointments, cont.

- ✔ Upon booking, two emails are received. One email will indicate who the appointment is with.

- ✔ Additionally, this email will provide a link to the Contractor Support Online Scheduling Tool page, where bookings can be rescheduled or cancelled.

From: Contractor Support <ContractorSupport1@clearesult5.onmicrosoft.com>
Date: April 29, 2024 at 10:03:53 AM EDT
To: Sarah Knoell ~ Test <saknoell@icloud.com>
Subject: Virtual Quarterly Check-In - Sarah Knoell ~ Test

Your appointment will be with Mitchell Bryk.

Contractor Support Online Scheduling
800-284–9069
http://hpwescontractorsupport.com/

Manage Booking

Booking Appointments, cont.

✓ The other email includes:

1. The contractor that booked the appointment.

2. Service type.

3. Date and time.

4. A link to manage the appointment.

5. A join meeting button.

6. Information provided by CLEAResult to prepare the contractor for the meeting.

Hi Sarah Knoell ~ Test **1**

Your Booking is confirmed.

Bookings details

Service Name	Special Projects	**2**

When	Friday, May 10, 2024	**3**
	11:10 AM - 11:40 AM	
	(UTC-05:00) Eastern Time (US & Canada)	

[↗ Reschedule] **4**   [🎁 Join your appointment] **5**

Additional Information **6**

Thank you for booking time with us. Prepare questions and have all relevant information available before your appointment, including enrollment IDs, error messages and photos. Appointments begin and end on time. If additional time is needed, let us know and we can assist you with rescheduling.

Bookings Management

✅ In the confirmation email that you received; you can manage your appointment. You can reschedule, cancel, and/or create a new booking by clicking the **Reschedule** button in the email.

Bookings Management: Rescheduling

✅ The Reschedule button will bring you to the Contractor Support Online Scheduling Tool page where you can select a new date and time for your original appointment. The ADD YOUR DETAILS and PROVIDE ADDITIONAL INFORMATION sections will prepopulate with the information you entered when you originally booked the appointment.

✅ Click Update booking button to finalize the updated details of your appointment.

✅ The screen will refresh to confirm the updated appointment was successful.

ADD YOUR DETAILS

First and last name *
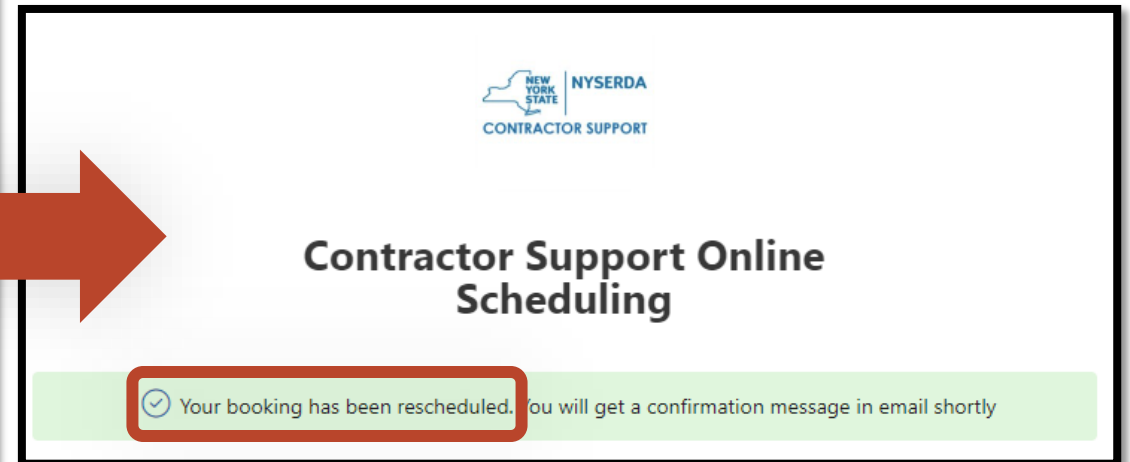Sarah Knoell ~ Test

Email *
sarah.knoell1@clearesult.com

Phone number *
8458200000

PROVIDE ADDITIONAL INFORMATION

Please let us know if you have any specific questions or topics you would like to review in this meeting below:

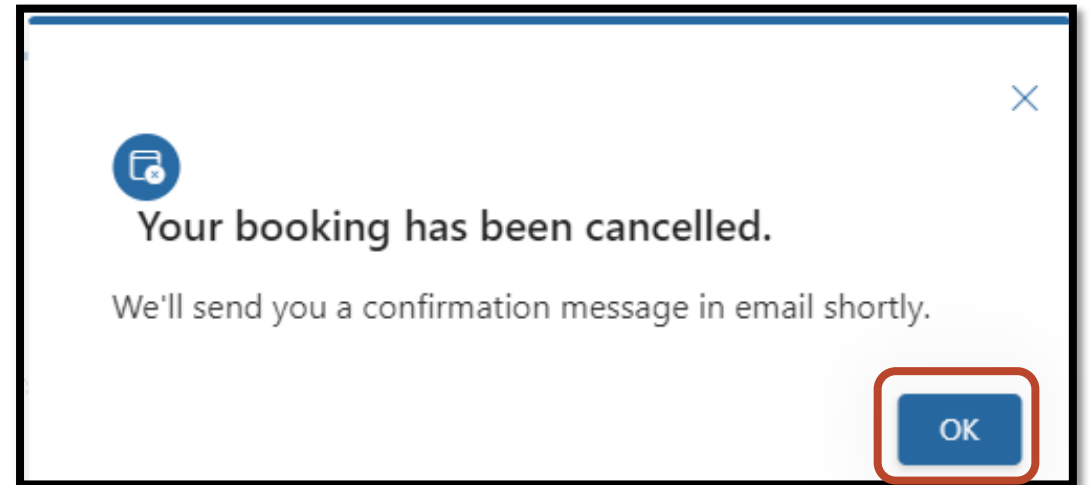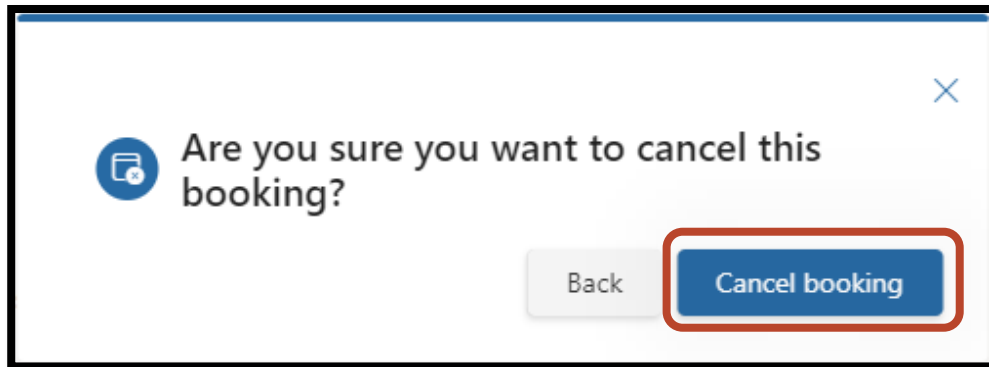This is just a test appointment.

Update booking   Back

NEW YORK STATE | NYSERDA
CONTRACTOR SUPPORT

Contractor Support Online Scheduling

✓ Your booking has been rescheduled. You will get a confirmation message in email shortly

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Bookings Management: Cancelling

- The Cancel booking button will cancel your original appointment.

- When you click the button, you will be asked to confirm that you want to cancel your appointment.

- Click Cancel booking to confirm.

- The window will refresh to show that your cancellation was successful.

- Click OK to close out.

Are you sure you want to cancel this booking?

Back   Cancel booking

Your booking has been cancelled.

We'll send you a confirmation message in email shortly.

OK

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Bookings Management: Creating a New Appointment

✓ The New booking button will bring you back to the Contractor Support Online Scheduling Tool landing page to book another meeting.

Upcoming booking for Sarah Knoell ~ Test

Special Projects

📅 Friday, May 10, 2024

🕐 11:10 AM (30 minutes)

Reschedule

Cancel booking

New booking

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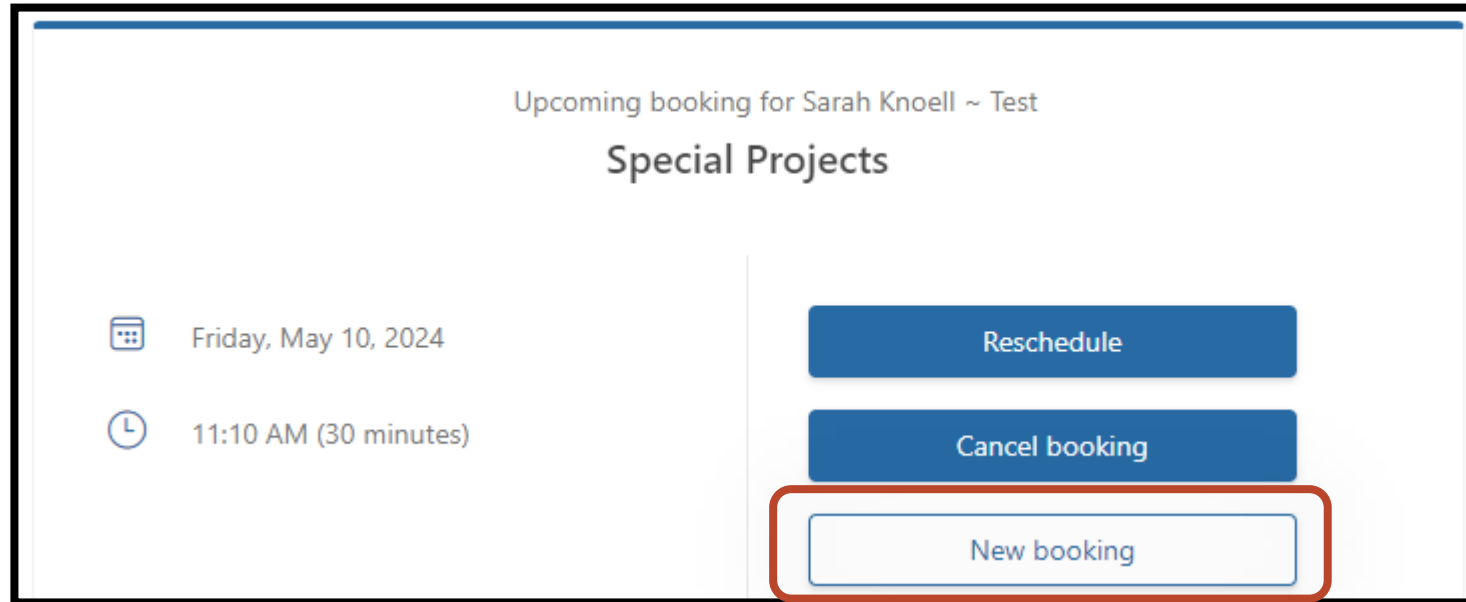
Joining a Teams Meeting

- ✅ One day prior to your appointment you will receive a reminder email.

- ✅ One hour prior to your appointment you will receive a final reminder email.

- ✅ At the time of your appointment, use the Join your appointment link from your initial confirmation email.

- ✅ Your meeting will launch from that link.

- ✅ 30 minutes after your appointment you will receive a feedback request email. Let us know how we did!

Bookings details

Service Name	**Special Projects**
When	**Friday, May 10, 2024** **11:10 AM - 11:40 AM** (UTC-05:00) Eastern Time (US & Canada)

Reschedule   Join your appointment

Thank you!

- ✓ Thank you for taking the time to learn the ins and outs of the **Contractor Support Online Scheduling Tool**!

- ✓ We looking forward to your meetings!

- ✓ Questions regarding the system should be submitted via: Email: <u>support.residential@nyserda.ny.gov</u> or the Support Line: (800-284-9069)

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