



CLEAResult[®]

Contractor Support Online
Scheduling Tool



Meeting Agenda

Speakers

- ✓ Terminology
- ✓ Accessing the Contractor Support Online Scheduling Tool
- ✓ When should you use the Scheduling Tool?
- ✓ Booking Appointments
- ✓ Appointment Management
 - Rescheduling
 - Cancelling
 - Creating a New Appointment
- ✓ Joining a Teams meeting

Sarah Knoell, Program Consultant



Terminology

1

Appointment/Booking:
An interchangeable name for an appointment scheduled through the Contractor Support Online Scheduling Tool.

2

Services: The type of booking/appointment.

- Our list of services and their descriptions 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:** General training for the NYHEP workflow.
- ✓ **NYHEP User Support:** Basic NYHEP support such as login assistance, user updates/new users, or general training.
- ✓ **Workscope Review Support:** Discuss a specific EmPower+ Workscope Review, including send back reasons and resubmission questions.
- ✓ **Final Project Review:** Discuss a specific EmPower+ Final Project Review, including send back reasons and resubmission questions.
- ✓ **Comfort Home Program/Technical Support:** Ask Comfort Home programmatic and enrollment review questions.
- ✓ **Invoice Payments:** Discuss the payment process or check on the status of a payment.



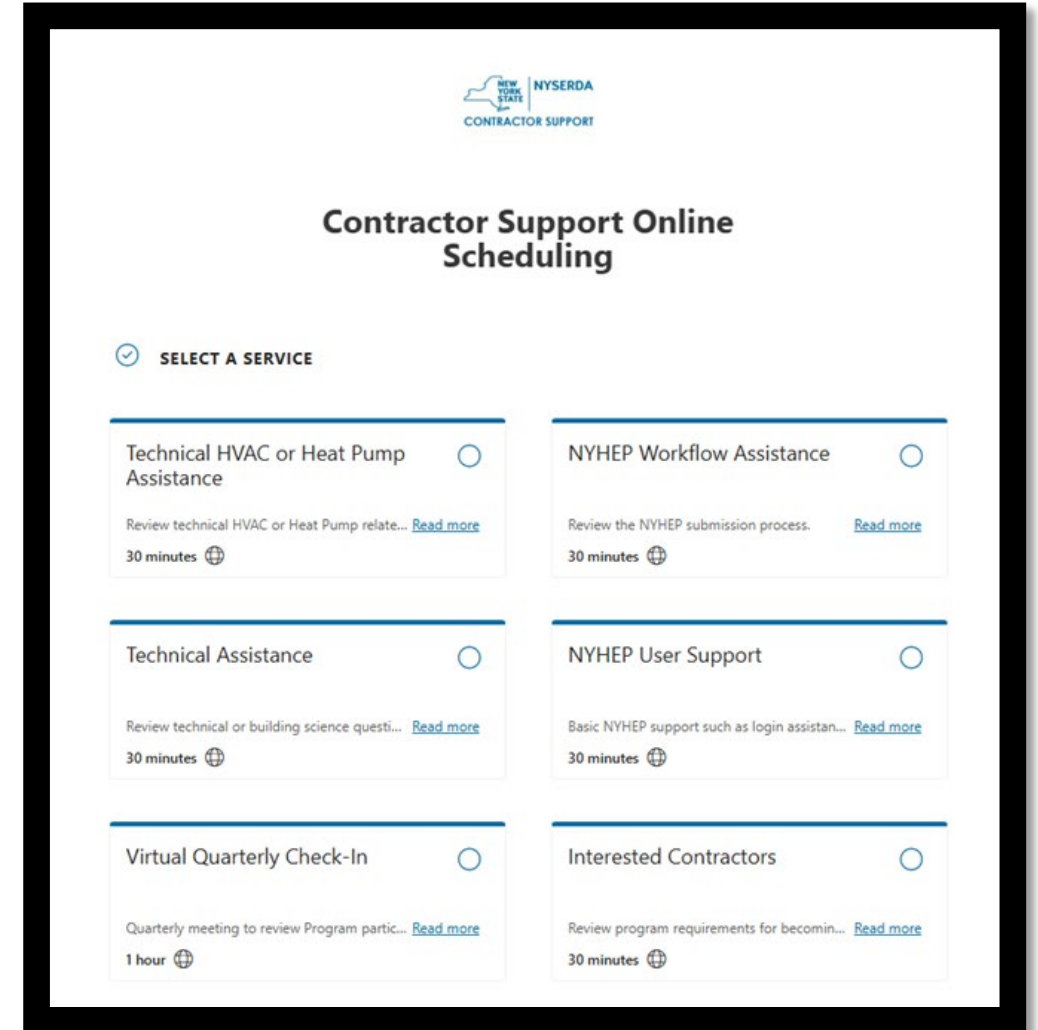
Available Services, cont.

- ✓ **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 ask general process questions.
- ✓ **Technical HVAC or Heat Pump Assistance:** Ask 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.
- ✓ **Interested Contractors:** Review program requirements for becoming a participating contractor in NYSERDA's EmPower+ or Comfort Home programs.



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 you use the Scheduling Tool?

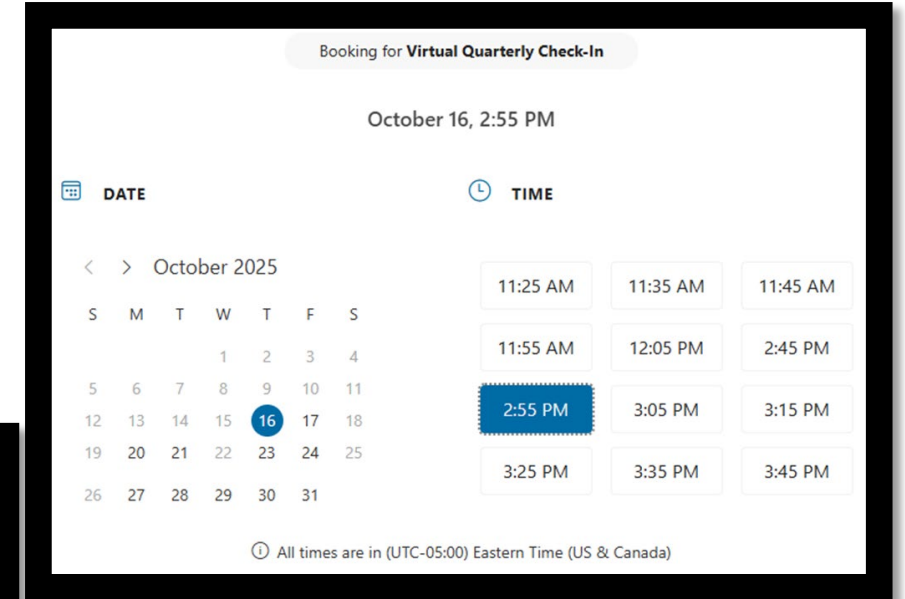
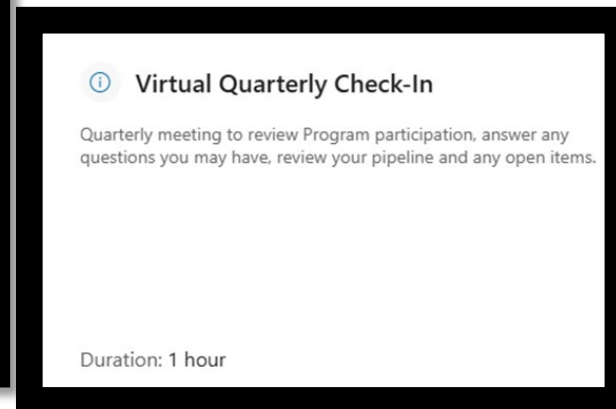
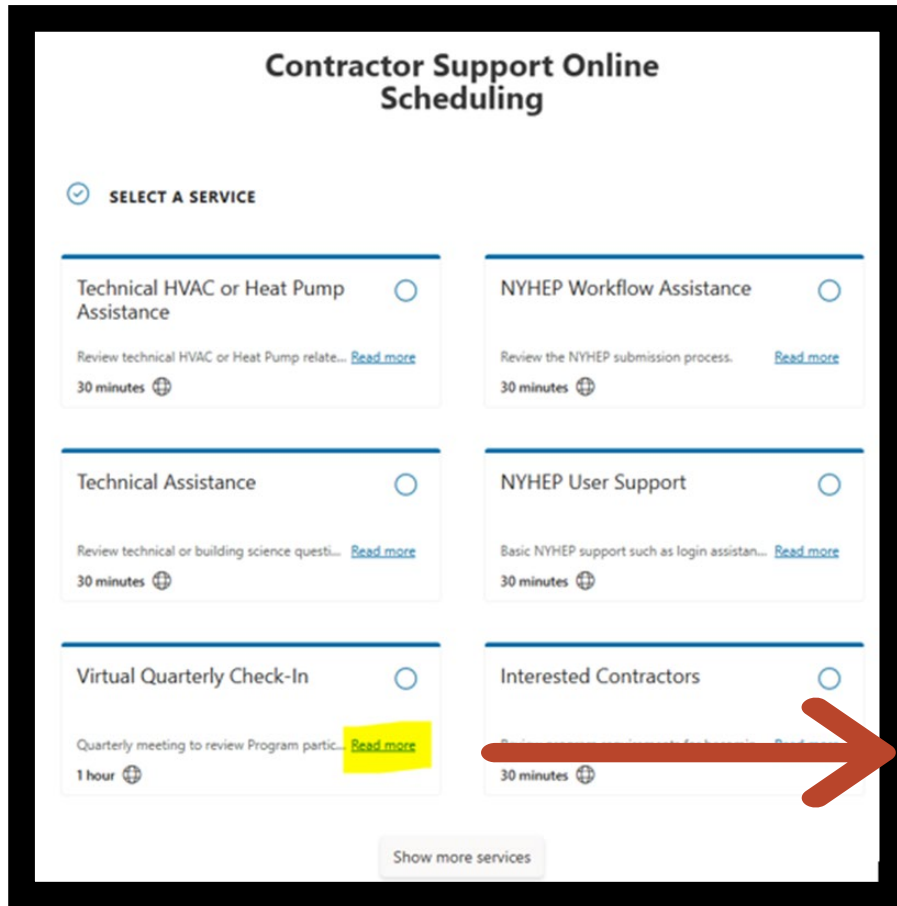
- ✓ The purpose of the Scheduling Tool is to allow contractors to schedule dedicated time with the right CLEAResult team member who can best assist them. These meetings are for *planned* programmatic or technical questions.
 - Example of when to use the Scheduling Tool: You know that on Wednesday you will 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 Support at 1-800-284-9069, live chat using the Contractor Website, or email support.residential@nyserda.ny.gov for immediate support.
- ✓ Each appointment has a set duration. If you want or need more time, you will need to book an additional meeting.





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 the service.
- ✓ Click the circle in the desired service tile and scroll down to input the **date** and **time** of the appointment that fits your schedule.





Booking Appointments, cont.

- ✓ As you scroll down the screen you will see the **ADD YOUR DETAILS** and **PROVIDE ADDITIONAL INFORMATION** sections to book your appointment. All fields are *Required*.
- ✓ Enter your **First and last name**, **Email address**, **Phone number**, and **additional information** pertaining to the appointment. This could be an enrollment number or a description of the help you need.
- ✓ Click the **Book** button to secure your appointment.
- ✓ The Contractor Support Online Scheduling Tool page will refresh and provide a confirmation message when you have successfully booked an appointment.

The screenshot displays a web form with two main sections: "ADD YOUR DETAILS" and "PROVIDE ADDITIONAL INFORMATION". The "ADD YOUR DETAILS" section includes input fields for "First and last name" (containing "Victoria Smith"), "Email" (containing "vsmith@company.com"), and "Phone number" (containing "5555555555"). A red error banner at the top of this section states "All fields are required!". Below this, a "Missing information" dialog box is shown, indicating that some required information is missing and listing "Required additional information". The "PROVIDE ADDITIONAL INFORMATION" section has a text area for notes, with the example text "I am working on a project that requires special handling. The enrollment # is 1000000." A blue "Book" button is located at the bottom of the form.





Booking Appointments, cont.

- ✓ Upon booking, you will receive two emails. 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 11:10 AM - 11:40 AM (UTC-05:00) Eastern Time (US & Canada) 3

Reschedule **4**

Join your appointment **5**

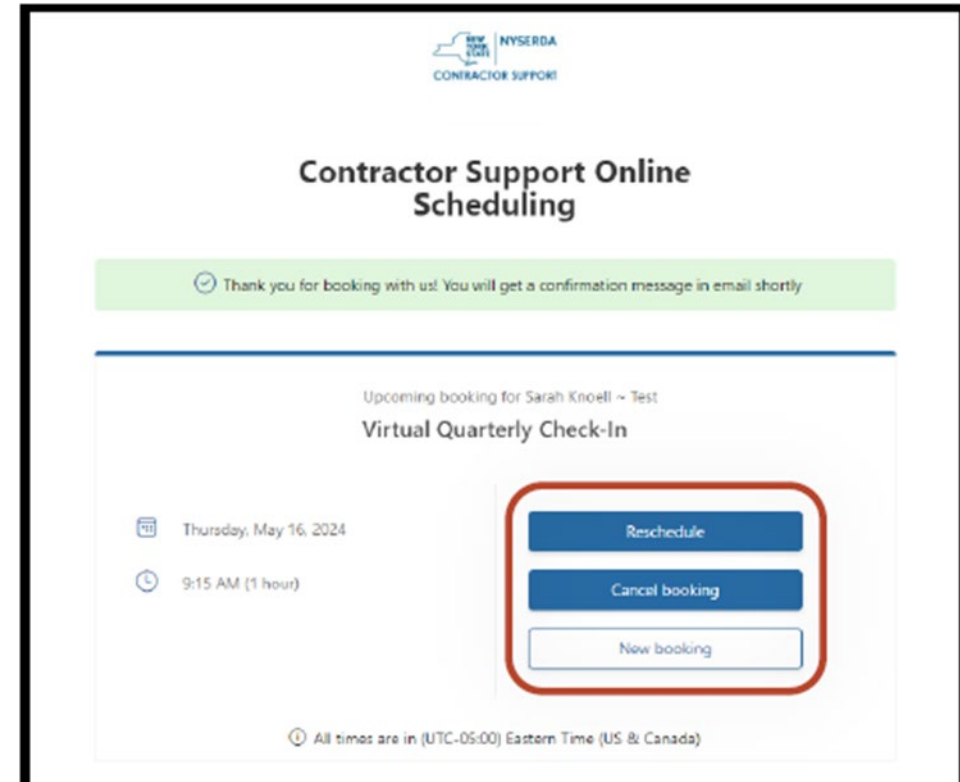
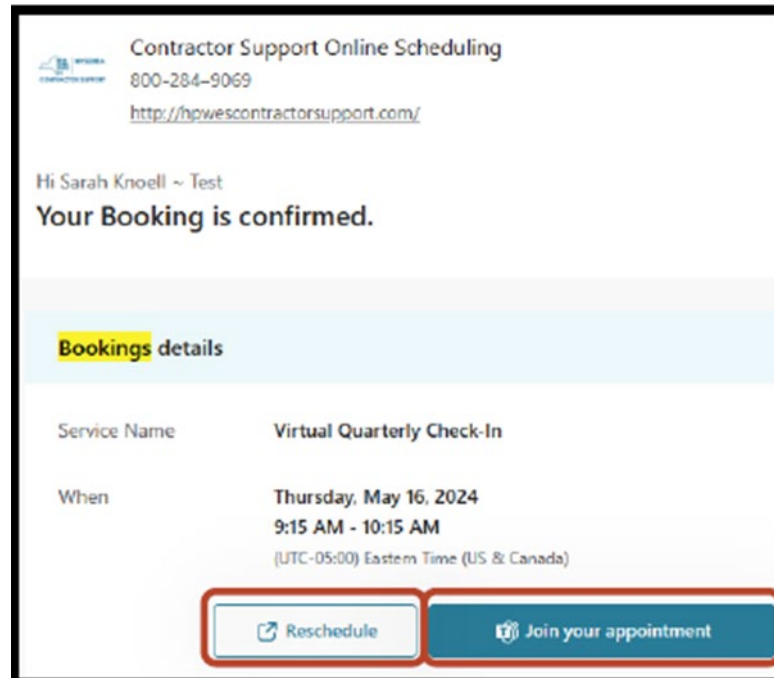
Additional Information **6**

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.



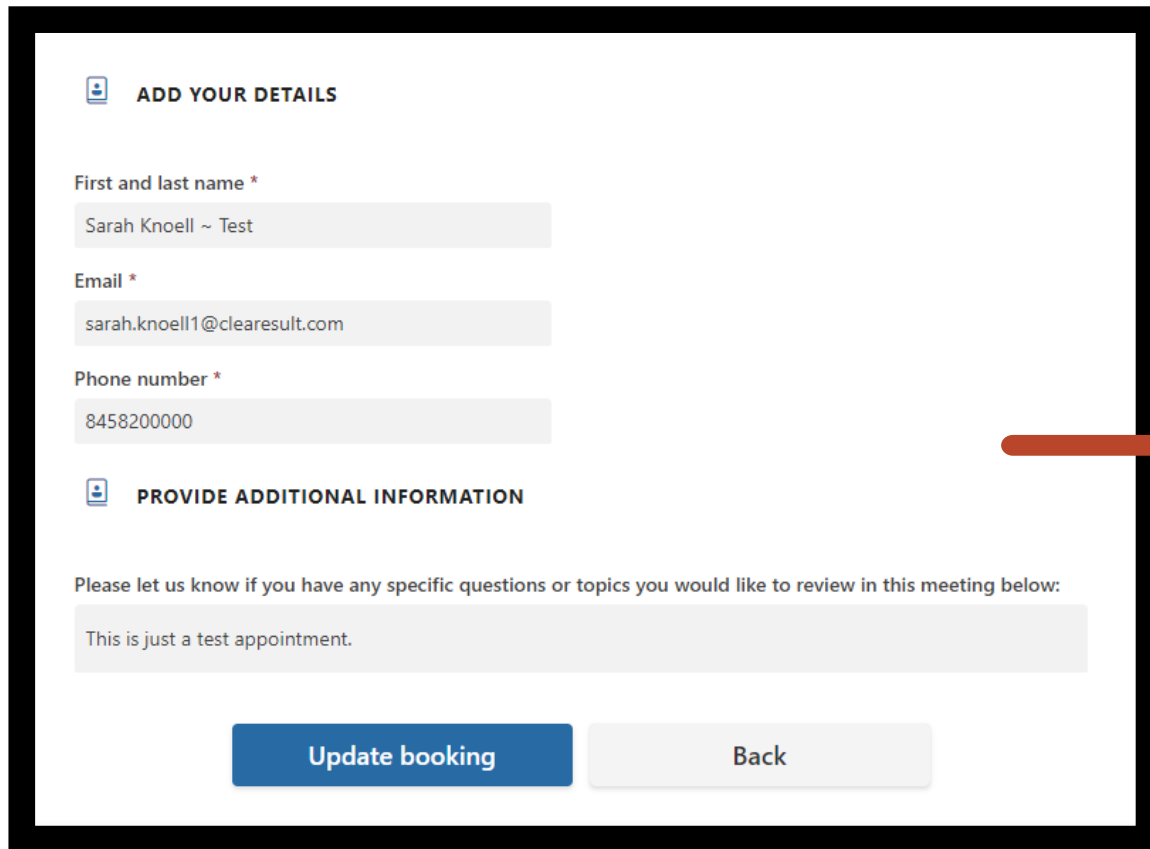
Bookings Management

- ✓ You can manage your appointment using the confirmation that you received. 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 repopulate with the information you entered when you originally booked the appointment.



ADD YOUR DETAILS

First and last name *

Sarah Knoell ~ Test

Email *

sarah.knoell1@clearesult.com

Phone number *

8458200000

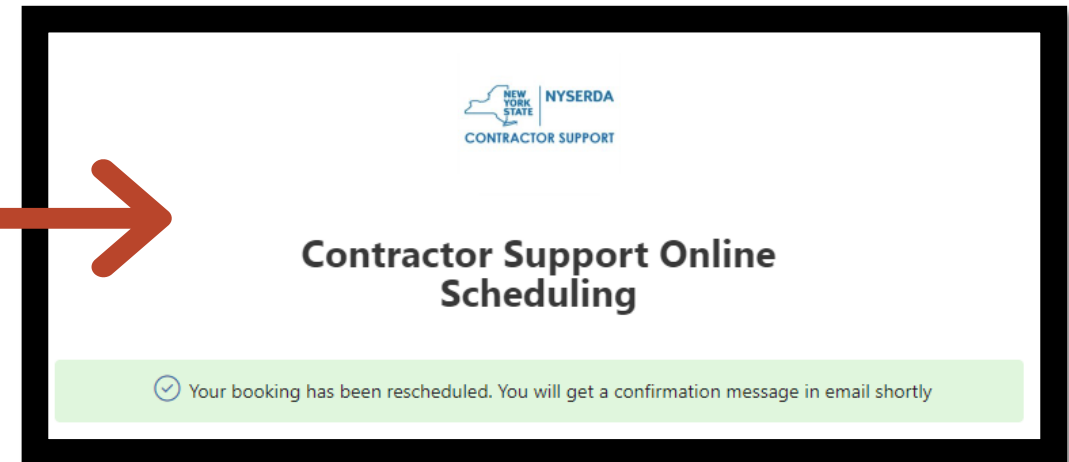
PROVIDE ADDITIONAL INFORMATION

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.

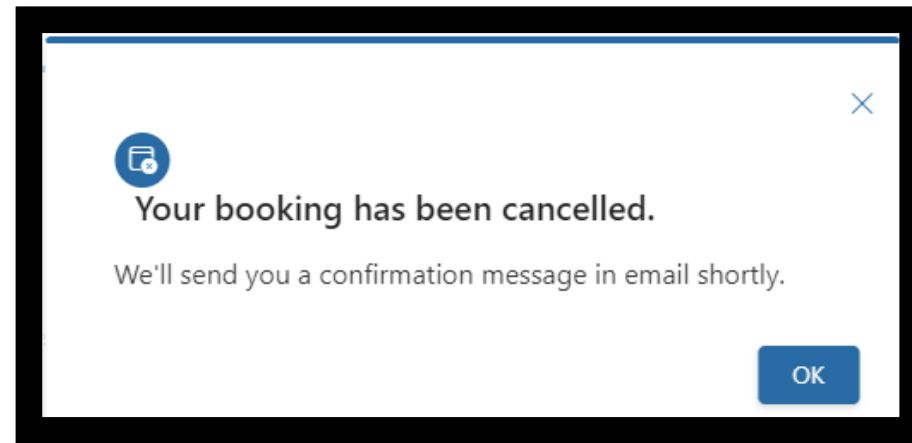
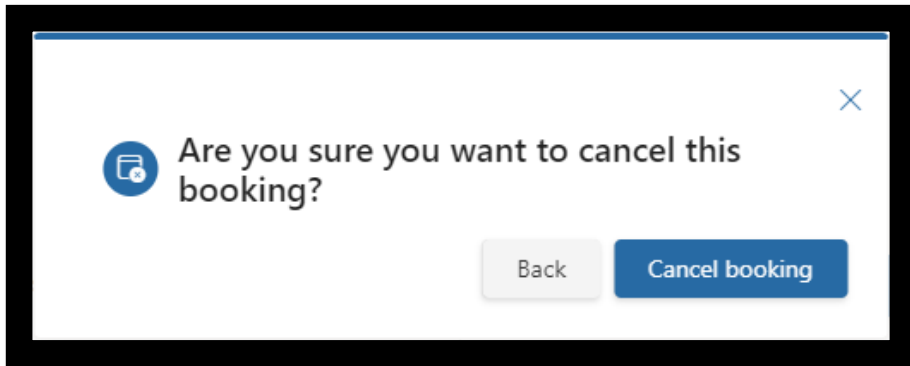
Update booking **Back**

- ✓ Click the **Update booking** button to finalize the updated details of your appointment.
- ✓ The screen will refresh to confirm the updated appointment was successful.



CR 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.





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.

A screenshot of a web interface for managing bookings. At the top, it says 'Upcoming booking for Sarah Knoell ~ Test' and 'Special Projects'. Below this, there are two rows of information: the first row shows a calendar icon and 'Friday, May 10, 2024'; the second row shows a clock icon and '11:10 AM (30 minutes)'. To the right of this information are three buttons: 'Reschedule' (blue), 'Cancel booking' (blue), and 'New booking' (white with a blue border).



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 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 look forward to your meetings!
- ✓ Questions regarding the system should be submitted by email to support.residential@nyserda.ny.gov, by live chat through the Contractor Website, or by calling the Support Line: 1-800-284-9069.

