



## **Direct Weatherization Customer Referral Policy**

CLEAResult will permit a Mass Save® Independent Installation Contractor (IIC), who originates a client for service in the Program, to offer weatherization incentives when the following guidelines are met.

### **Eligibility:**

The Direct Weatherization (Direct Wx) process is utilized by an IIC to facilitate the participation of its' own clients in the Program, making it possible for a pre-existing affiliation to result in completion of weatherization work in the Program. However, an IIC must take care not to interfere with a pre-existing Customer Relationships with other vendors or stakeholder. An IIC participating in the Program who comes into contact with a prospective client who has already been served an HEA may not pursue Direct Wx for that client.

In order to be eligible to receive the Mass Save® incentives through Direct weatherization services clients must meet the following criteria:

1. The client must fall into one of the following two categories:
  - a) A client who heats with natural gas and has an active Eversource or National Grid account residential gas utility account, or;
  - b) A non-gas heat client who has an active Eversource or National Grid residential electric utility account
2. The account under which the Program is delivered must not be associated with a low-income rate.
3. The associated building must be a 1-4 unit residence.

### **Direct Weatherization Process Steps:**

1. A participating Independent Installation Contractor (IIC) identifies a potential client via independent marketing.
2. The IIC contacts CLEAResult to check Customer Eligibility.
3. The IIC visits the proposed work site and checks the home for potential barriers (moisture, knob & tube, asbestos, etc.). The IIC performs a combustion safety test (if applicable). At this time they also creates a scope of work that is consistent with the Mass Save® Program Standard for Materials, Installation, and Conduct for Energy Efficiency Measure Installation Contractors. The IIC will complete the Direct Wx Spreadsheet, which generates a Cost Summary, Invoice and Certificate of Completion. The IIC will generate their own contract for the customer to sign.
4. After completing the IIC sales visit, the IIC must submit the completed Direct Wx Spreadsheet, as well as any relevant documents, such as the contract and permit information, to [directwx@clearresult.com](mailto:directwx@clearresult.com).



## ***Mass Save® Residential Coordinated Delivery Program***

5. All Direct Wx completed jobs must be modeled in our software, to be able to capture savings and be report to the Utility. Therefore, allow an extra 5 days to the normal payment time frame. The invoice will not be paid unless an appointment exists for the HEA/Inspection.
6. Customers should always be informed that there is a Heat Loan option. If they are interested in pursuing that option for payment of the insulation work, or if the Heat Loan will be used to address a combustion safety roadblock, then they will need to go through the regular HEA route.
7. At the time of the scheduled Mass Save® Home Energy Assessment, the installed weatherization measures will be inspected. At this time, it will be determined if any Return Visits or Billing Adjustments need to occur.
8. At any time during this process, the IIC is encouraged to contact Contractor Hotline or their Account manager with any concerns.

**Please contact your account manager for further details and training**