



## **Customer Referral Policy**

CLEARRESULT will assign Mass Save® Residential coordinated delivery program weatherization work to an Independent Installation Contractor (IIC) who originates a client for service in the Program. Such “affiliated” work will be assigned to an IIC when the following guidelines are met.

### **Eligibility:**

The Participating Contractor Referral (PCR) process is utilized by an IIC to facilitate the participation of its’ 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 intercede with a customer’s participation in the Program with another contractor participating in the Program. An IIC participating in the Program who comes into contact with a prospective client who has already been served an HEA may not submit a PCR form to CLEARRESULT for that client. Any participating customer of the Program who is dissatisfied with the service they’ve received should be instructed to contact the Program’s Customer Service Department at **1-866-527-7283**.

In order to be eligible for the Mass Save® Program with CLEARRESULT as Lead Vendor to National Grid and Eversource, prospective IIC clients must meet the following criterion:

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 residential gas utility account, or;
  - b) A non-gas heat client who has an active National Grid or Eversource 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.

### **Participating Contractor Referral Process Steps:**

1. A participating Independent Installation Contractor (IIC) identifies a potential client via independent marketing.
2. The IIC visits the proposed work site, performs a combustion safety test (if applicable), checks the home for potential barriers (moisture, knob & tube, asbestos, etc.) and 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**.
3. The IIC then completes a Participating Contractor Referral (PCR) form on which it has obtained the client’s signature and leaves a copy of the form with the client.
4. After completing the site visit, the IIC must scan and email the signed PCR to CLEARRESULT.
5. Once the completed PCR form is received, the IIC choice is subject to confirmation by a representative from the Mass Save® program.



## *Mass Save® Residential coordinated delivery program*

6. If an HEA is needed, CLEARRESULT will call the customer to schedule a Home Energy Assessment and will “tag” the resulting Site ID as referred by that IIC. This will eventually be used to assign any resulting work order to the referring IIC.
7. If multiple participating IICs attempt to refer the same customer as a Participating Contractor Referral, the customer will be consulted and will be allowed to choose between the IICs with whom the customer has signed a PCR form, or select any other program IIC, or elect to be assigned to an IIC through the Merit Based Work Allocation System.
8. The customer will be scheduled for a Mass Save® Home Energy Assessment and a copy of the PCR will be sent to the scheduled Energy Specialist.
9. The Mass Save® Energy Specialist will then develop the weatherization work scope based upon Program rules and the approved Materials Installation Standards.
10. Once finalized, the resulting Work Order will be assigned to the IIC as defined by the process above.
11. At any time prior to the IIC performing work as described herein, the customer may choose to receive the installation of weatherization work from another service provider.
12. A PCR received after the customer has an HEA will be considered a customer request and will not count as a PCR or self-recruited work.