Process Flow for Home Performance with ENERGY STAR **Customer contacts Constituency Based** with GJGNY Financing Organization (CBO) CBO informs customer of HPwES audit, **NYSERDA** financing, and incentive CBO qualifies customer for free/reduced cost audit and provides a list of participating Constituency Based **BPI** accredited contractors Organization (CBO) Program Lender Customer contacts participating BPI Customer accredited contractor Participating Contractor Program Customer finds other Implementer HPwES fits customer need? contractor or program **NYSERDA** Yes **Customer submits Credit Application** Customer may delay loan application until a scope of work is agreed to. Program Lender (PL) prequalifies customer PL communicates ineligibility to Eligible? customer contractor and CBO if appropriate Yes Schedule Audit Audit completed Agree on work scope. Customer & contractor sign contract Upload software file and work scope Currently EFS also reviews Review and Approve Project Proposal. contract Notify PL and create project file in database PL drafts loan agreement. Upon Information sent to Customer signs loan receipt of signed agreement a notice Customer agreement will be sent that work may begin Installation occurs **Customer signs Completion** Certification NYSERDA transfers payment for loans Program Lender pays Contractor. Submits electronic loan file to NYSERDA for purchased within 24 hours purchase.

Flow **Participating** Contractor Insulation Complete - Upload completion Paperwork Commence QA of Commence Processing of **NYSERDA** Review incentive Financing Incentive – Pull **Project Completions**package; enter **Project Completions Program Provide Project** invoice into Finance Database and Electronically completions to QA Database; and issue Submit incentive package to check to Customer Contractor NYSERDA **QA** Contractor Honeywell ► Select a sample of complete projects Program Implementer Schedule QA inspection with Customer; project information is downloaded from Program database; Contractor is invited to attend Customer Conduct QA Inspection and upload results to Program Implementer Upload passing inspections to Project file Contact Contractor of failed inspections; email Declaration of Completion Correct deficiencies within 30 days Sign Declaration of Completion Sign Declaration of Completion and email to **Program Implementer** Upload inspection to Project File Send Quarterly QA Reports to Contractors summarizing inspections on their projects

Home Performance with ENERGY **STAR Quality Assurance Process** 

CSG