**ASSESSMENT PROCESS: ANALYST**

**QUALIFICATIONS**
- Meet and Interview with ERC Staff
  - Resume / Experience
  - Certifications
  - Insurance
  - Background Check
- Attend Energy Smart Orientation
  - Customer Service
  - Home Energy Assessment
  - Payment Process
- Pick up “Quick Fix” Materials
  - From Energy Resource Center

**SITE WORK**
- Ask Participant to Contact Energy Resource Center
- Collect Participant Contribution - $50
  - Provide: Receipt
  - Quick Fix Checklist
  - Fridge Magnet
  - To-do List
- Kitchen Table Consultation
  - Review the Assessment, findings and recommended actions
- Install Quick Fixes
  - As needed and agreed to by Participant
- Safety & Energy Testing
  - Use Surveyor Format for data entry
- Professional Presentation of Energy Smart to Participant
  - Name Tag
  - Shirt
  - Clipboard
  - Logo on Vehicle

**FOLLOW UP**
- Provide the Energy Smart Assessment Report to Participant and ERC
- Submit the “Request for Payment” Form to ERC
- ERC Follows Up with Participant
  - Assessment Review
  - Assist with Action Plan
  - Rebates
  - Contractor Referrals
- ERC Tracks Work Completed & Conversion from Assessment to Retrofit

**EnergySmart**