



EnergySmart

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

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

Nametag
Shirt
Clipboard
Logo on Vehicle

SITE WORK

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