

Mass Save[®] Heat Pump Installer Network – Steps to Enroll Your Company

Step 1. Have an authorized company representative gather the required documentation.

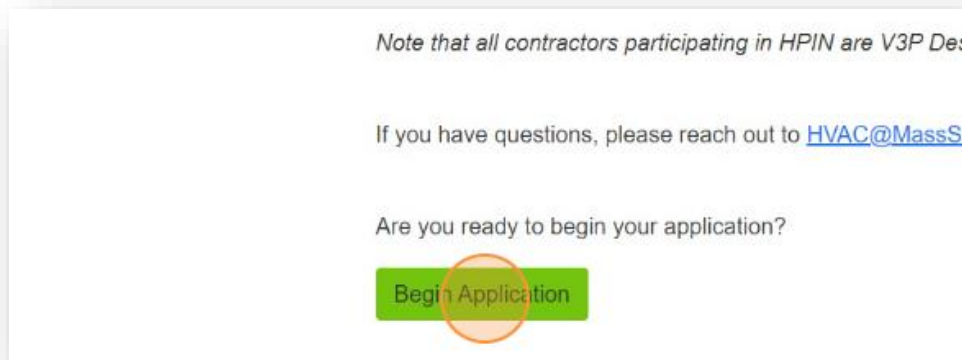
- Review the [Mass Save Heat Pump Installer Network Participation Agreement](#): It is critical that this agreement is reviewed in full, by an authorized representative of your company.
- **Collect the required company documents and certifications:**
 - ☑ Signed copy of the Mass Save Heat Pump Installer Network (HPIN) Participation Agreement
 - ☑ Business W-9
 - ☑ Massachusetts HVAC or Electrical Contractor/Plumbing License (Massachusetts Sheet Metal, Refrigeration, Electrical Contractor, or Plumbing License accepted)
 - ☑ Certificate of Comprehensive General Liability Insurance (for informational purposes only)
 - ☑ Certification of relevant training –
 - Air Source Heat Pump and Variable Refrigerant Flow (VRF) primary installers:
 - ☑ EPA Section 608 Certification
 - ☑ Certification of air source heat pump installation training provided by a heat pump manufacturer
 - Ground Source Heat Pump primary installers:
 - ☑ International Ground-Source Heat Pump Association (IGSHPA) accredited installer certificate or an IGSHPA GeoExchange Designer certificate

Step 2. Create an account in the Mass Save secure document portal

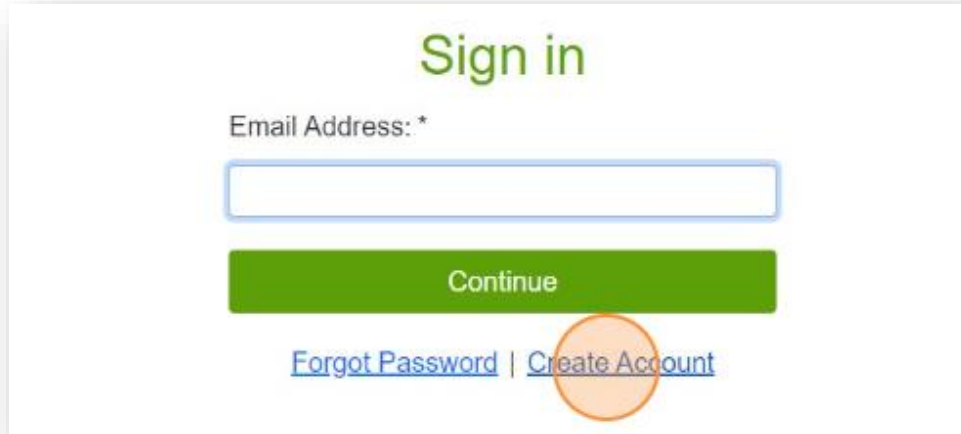
- Visit the [Mass Save Secure document portal](#) where you will find instructions to submit documentation for participation for your company. Start by creating an account if your company doesn't already have an account.
- To login or create an account, click "Apply Now."



- At the bottom of the page, click "BEGIN APPLICATION."



- Click “CREATE ACCOUNT.”



Sign in

Email Address: *

Continue

[Forgot Password](#) | [Create Account](#)

The image shows a 'Sign in' form. At the top, the text 'Sign in' is displayed in green. Below it is a label 'Email Address: *' followed by an empty text input field. Underneath the input field is a green button labeled 'Continue'. At the bottom of the form, there are two blue links: 'Forgot Password' and 'Create Account'. The 'Create Account' link is circled in orange.

- Fill in the required fields marked with the asterisk (*) and then click “SUBMIT”.



123@test.com

Password: *

Re-Enter password: *

Submit

The image shows a registration form. The first field is 'Email Address' with the value '123@test.com'. The second field is 'Password: *' with a masked value of '*****'. The third field is 'Re-Enter password: *' with a masked value of '*****'. Below the fields is a green button labeled 'Submit', which is circled in orange.

- Retrieve the authorization code sent to your email address, input it into the required field, and then click “SUBMIT.”



Enter authorization code sent via email

Authorization Code: *

Submit

The image shows an 'Enter authorization code sent via email' form. The title is 'Enter authorization code sent via email'. Below it is a label 'Authorization Code: *' followed by a text input field containing the value '5A5EEC'. Below the input field is a green button labeled 'Submit', which is circled in orange.

Step 3. Upload all required documentation through the secure documental portal.

- Have an authorized representative of your company login to the [secure document portal](#) and upload a fully completed and signed [Mass Save Heat Pump Installer Network Participation Agreement](#) and provide relevant licenses, certificates, and proof of training (See **Step 1**).
- Complete the required fields marked with the asterisk (*) in the “Contacts” section. You may save the contact information if you will be returning to complete the application later by checking the box next to “Save this as a new contact in my profile contact list.” Once all required fields are completed, click “Continue.”

The screenshot shows a contact form with the following fields and values:

Field	Value
Last Name	TEST
Company	TEST
Address (cont)	
City*	TEST
State/Province*	MASSACHUSETTS
Postal Code*	02131
Phone*	1234567890
eMail*	123@test.com

Below the form, there is a checkbox labeled "Save this as a new contact in my profile contact list" which is currently unchecked. A "Clear Contact" button is located below the checkbox. At the bottom of the form, there are two buttons: "Continue" (highlighted with an orange circle) and "Save & Complete Later", separated by the text "OR -".

- In the “Application Section” click the first drop down menu and select “Mass Save Heat Pump Installer Network (HPIN)”. Then in the second drop down, select the type(s) of

equipment your company installs. (This will impact the documents you are required to upload.) Once you have finished, click “Continue.”

Application

Application Section

Are you applying for your company to join the Mass Save Heat Pump Installer Network (HPIN) or only for your company to become a Mass Save Verified 3rd Party (V3P) Designee? Note that all contractors participating in HPIN are V3P Designees.*

Mass Save Heat Pump Installer Network (HPIN)

Additional Question

Note: Please only complete the next question if you selected HPIN above. If you selected V3P, skip the next question and click Continue.

Which type of installer(s) are you applying for *

Air Source Heat Pump and/or Variable Refrigerant Flow (VRF) installers

Back Continue - OR - Save & Complete Later

- In the “Document Upload” section, please upload the required documents by first clicking into the box, click “Choose File,” and then “Upload file”. Repeat this process for each document upload.

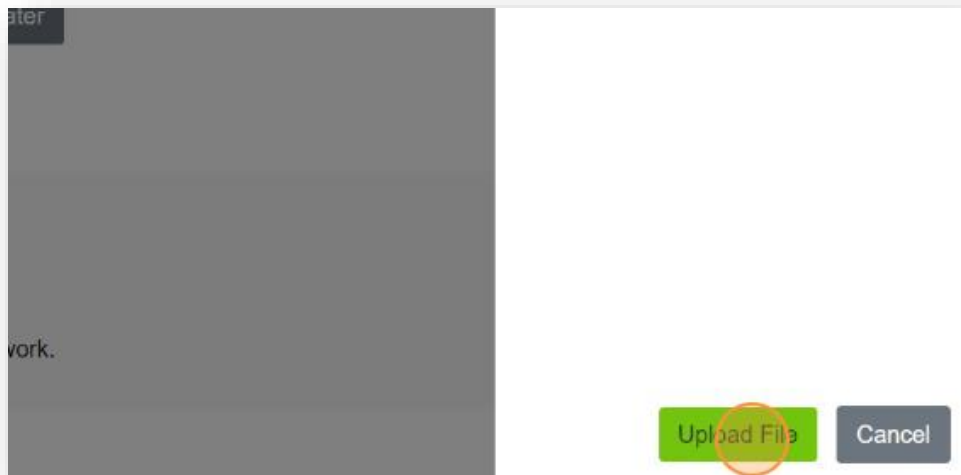
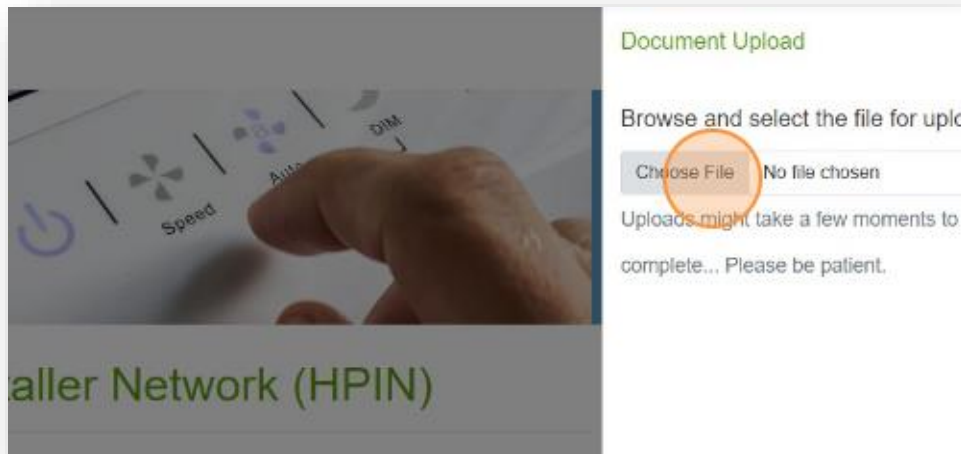
Document Upload Mass Save Heat Pump Installer

Document Upload

The following items need action by you. Click each item to complete.

Document Upload Signed copy of the Mass Save Heat Pump Installer Network (HPIN) Participation Agreement	Document Upload W-9
Document Upload Certificate of Comprehensive General Liability Insurance	Document Upload EPA Section 608 Certification

Back Complete Application - OR - Save & Complete

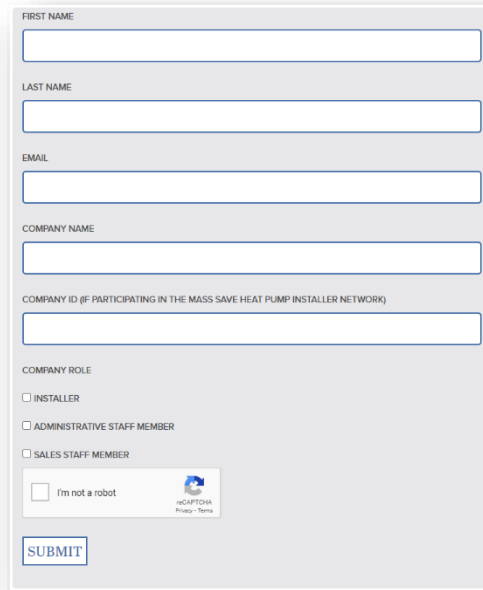


- Once all documents have been uploaded, please click “Complete Application,” which will submit it for our review.



Step 4. Residential Installers – Have all your company’s installers complete the Energy Efficiency Learning Center (EELC) registration form.

- **Complete the EELC registration form [here](#).** This will enroll your company’s installers in the Energy Efficiency Learning Center (EELC), where they will find the required residential installer courses necessary for your company to remain active in HPIN. *Note that the company representative does not need to complete this form as they will be invited based on secure portal information already provided.*



The image shows a registration form with the following fields and options:

- FIRST NAME: [Text input field]
- LAST NAME: [Text input field]
- EMAIL: [Text input field]
- COMPANY NAME: [Text input field]
- COMPANY ID (IF PARTICIPATING IN THE MASS SAVE HEAT PUMP INSTALLER NETWORK): [Text input field]
- COMPANY ROLE:
 - INSTALLER
 - ADMINISTRATIVE STAFF MEMBER
 - SALES STAFF MEMBER
- I'm not a robot (with a reCAPTCHA logo and "Privacy - Terms" link)
- SUBMIT: [Submit button]

- **Receive email invitation including login credentials within 2 business days:** The email will be sent from notifications@learnupon.com and will contain a link to create your user profile. Please follow the link once you receive it to complete setup of your account. If you have not received an invitation within 2 business days of submitting the form, please contact HVAC@MassSave.com.

If all required documentation has been submitted properly, you will receive approval within 3 business days.

If required documentation is missing, you will be notified that your submission has been rejected and have the opportunity to resubmit.

If you have any questions about the process, please contact us at HVAC@MassSave.com or 833-664-0348.