

National Grid Workflow Automation - Return Visits in the QA Workflow

Contents

1. New Return Visit Assignment	2
2. Complete Return Visit Scheduling	3
3. Complete Return Visit	4
4. Return Visit Review	4
5. QA Report Info	5

Created by EnergySavvy
Edited/Distributed by Abode Energy Management for HPCs

If you have questions regarding QA Reports, please email Inspections@AbodeEM.com
or call 339-707-0994.

1. New Return Visit Assignment

If a Return Visit is determined to be needed, the Return Visit Scheduling stage will be assigned to the contractor by the Lead Vendor, and the contractor will receive an email notification about the assignment:

The project and task can be viewed either by clicking on the link provided in the email, or by filtering project views on the Project page.

New Return Visit Scheduling Task

PLEASE DO NOT RESPOND TO THIS EMAIL.

DIRECT RESPONSES TO energy@savvy.com.

Hello [REDACTED],

We've got a new Return Visit Scheduling task for you!

Project ID: 3021463
Name: Henry Merco
Phone: 123-456-7890
Location: Yarmouth, MA 02673

[View all project details here](#)

nationalgrid
HERE WITH YOU. HERE FOR YOU.

The screenshot displays the National Grid Project Management System interface. On the left, a sidebar titled 'All Programs' contains a 'Refine by...' section with a 'Reset' button. Below this, several program categories are listed with checkboxes and counts: 'Early Equipment Research' (25), 'Early Equipment Research Complete' (20), 'HES Audit Program' (2, 40, 4, 1, 9, 126, 6), 'HES Weatherization Program' (3, 1, 9, 28, 1, 35), and 'HES QA/QC' (7, 4, 1). The 'Return Visit Scheduling' task is highlighted with a red box and a count of 4. The main area, titled '4 Projects', shows a list of projects sorted by 'Due Date'. Each project entry includes an address, contact information, project ID, and a status box indicating the due date (e.g., '5 days past due', '4 days past due', 'Due in 2 days', 'Due in 8 days'). The 'Henry Merco' project is highlighted with a red box. A 'Next step' button for each project says 'Complete Return Visit Scheduling...'. At the bottom, it says '4 Projects sorted by Due Date'.

Address	Contact	Project ID	Status	Next Step
60 Center St Weston, MA 02493 123-456-7890	HES QA/QC	Project ID: 3021374	5 days past due	Complete Return Visit Scheduling...
Calvin St Somerville, MA 02143 123-456-7890	HES QA/QC	Project ID: 3021381	4 days past due	Complete Return Visit Scheduling...
2-10 Market St Lynn, MA 01901 123-456-7890	HES QA/QC	Project ID: 3021405	Due in 2 days	Complete Return Visit Scheduling...
47 Kaycee's Way Yarmouth, MA 02673 123-456-7890	HES QA/QC	Project ID: 3021463	Due in 8 days	Complete Return Visit Scheduling...

2. Complete Return Visit Scheduling

This screenshot shows the 'Complete Return Visit Scheduling' form for Project ID 3021463. The form is titled 'Complete Return Visit Scheduling' and has a status of 'Due in 8 days'. It is assigned to Henry Merco on June 18, 2018. The due date is June 25, 2018. The form includes a section for 'Required fields' with a 'Site Visit Start Time' field. There is a note field with 'Add a Note (optional)'. The form also has buttons for 'Send Now' and 'Save & Send Later'. On the right side, there are links for 'Add Note', 'New Audit Project', 'Is this an emergency return visit?', 'Return visit notes', 'Signed Certificate of Completion/Inspection', 'Audit Data', 'Linked Project (3021122)', and 'All Project Notes'. The project timeline shows 'Jun 18' with 'Automated workflow enabled' and 'task assignment'.

After opening the new Return Visit Scheduling task, the contractor will be presented with Lead Vendor return visit notes and other information in the project start data before moving forward with scheduling. Note that, if the return visit was designated as an “Emergency Return Visit”, that information is also surfaced in start data.

This screenshot shows the 'Complete Return Visit Scheduling' form for Project ID 3021400. The form is titled 'Complete Return Visit Scheduling' and has a status of 'Due in 8 days'. It is assigned to Henry Merco on July 2, 2018. The due date is July 9, 2018. The form includes a section for 'Required fields' with a 'Site Visit Start Time' field set to '2018-07-03 8:00 AM'. There is a note field with 'Add a Note (optional)'. The form also has buttons for 'Send Now' and 'Save & Send Later'. On the right side, there are links for 'Add Note', 'New Audit Project', 'Is this an emergency return visit?', 'Return visit notes', 'ISMs Report', 'Audit Data', 'Linked Project (3021399)', and 'All Project Notes'. The project timeline shows 'Jun 18' with 'Automated workflow enabled' and 'task assignment'. A red circle highlights the 'Is this an emergency return visit?' field.

3. Complete Return Visit

Upon completion of the return, the contractor will mark the Return Visit as such, and include any notes or files they wish to attach, before submitting the task for final approval from the Lead Vendor.

The screenshot shows a web application interface for completing a return visit. On the left is a sidebar with navigation links: 'HES QA/QC', 'Henry Merco' (Project ID: 3021463), 'Next Action', 'Project Flags & Deposits', 'Full Details', 'Project Info', 'Premise' (47 Kaycee's Way, Yarmouth, MA 02673), 'Participant' (Henry Merco, 123-456-7890), and 'Program Info' (Stage: Return Visit, Updated: 14 minutes ago). The main content area is titled 'Complete Return Visit' and includes a 'Due in 43 days' badge and a 'Jump to Timeline' link. It shows the task was assigned on June 18, 2018, with a due date of July 30, 2018. There are buttons for 'Extend Due Date' and 'This task cannot be completed'. A section for 'Return visit complete?' has radio buttons for 'Yes' (selected) and 'No'. Below this is a text box for 'Return visit notes' containing 'Correct measures have been installed.' and a 'Supporting documentation' section with a file upload area (labeled 'File 1') and a 'Select files...' button. On the right, there are links for 'Add Note', 'New Audit Project', 'Return visit notes', 'Incorrect measures installed', 'Signed Certificate of Completion/Inspection', 'Audit Data', 'Linked Project (3021122)', and 'All Project Notes'. At the bottom are 'Send Now' and 'Save & Send Later' buttons.

4. Return Visit Review

Once the Return Visit is completed, the project will move to the Return Visit Review stage which is completed by the Lead Vendor. If the Lead Vendor passes the return visit, the project will move to closed-complete. If additional information is needed about the return visit, the Lead Vendor can fail the review and move the project back to the Return Visit stage. The contractor will be notified via email if the project was moved back to the Return Visit stage.

The screenshot shows an email notification from National Grid. The subject is 'A Return Visit Task Needs to be Revised'. The body text says: 'PLEASE DO NOT RESPOND TO THIS EMAIL. DIRECT RESPONSES TO [redacted]@energysavvy.com.' It then says 'Hello [redacted], You've got a Return Visit that needs to be revised. Click the link below to see details.' Below this is project information: 'Project ID: 3021463', 'Name: Henry Merco', 'Phone: 123-456-7890', and 'Location: Yarmouth, MA 02673'. It also says 'Reviewer's Notes: Failed' and includes a link 'View all project details here'. At the bottom is the National Grid logo and the tagline 'HERE WITH YOU. HERE FOR YOU.'

If the project was moved back to the Return Visit stage, Lead Vendor notes will be surfaced in the start data.

Complete Return Visit

Due in 43 days

Assigned July 6, 2018

Jump to Timeline ▼

Due date: Aug. 17, 2018

Extend Due Date

This task cannot be completed

* Required fields

Return visit complete? *

☒ Yes
☐ No

Return visit notes

Xzy has been fixed.

Supporting documentation

Label

File 1

Return Visit Notes.pdf

Select files...

Add a Note (optional)

+

Send Now

Save & Send Later

Add Note
New Audit Project

Return visit notes
Please fix xyz

HEA report

Audit Data

Linked Project (3021382)

All Project Notes

Upon completion of the task, the project will be once again sent to the review stage with the Lead Vendor, for a second review.

5. QA Report Info

After a Weatherization QA/QC project has completed the Manager Review stage, the QA/QC Report will be emailed and made available on the project to view and download. It can be accessed via the link emailed to the contractor or under Project Info tab of the project.

Contractor Job Score for Project 3021467

PLEASE DO NOT RESPOND TO THIS EMAIL.

DIRECT RESPONSES TO 

Goodman the HPC,

A Contractor Job Performance Evaluation was completed for:

Project ID: 3021467

Participant Name: Andrew

Overall Job Status: Pass

Job Score: 6.16

Notes: need to test

Please follow this link to see the full report: [QA/QC Report](#)



HES QA/QC

Henry Merco

Project ID: 3021477

Next Action

Project Flags & Deposits

Full Details

Project Info

Premise

View Details >

11 Whitcomb Ave

Ayer, MA 01432

Participant

View Details >


Previous Visit Information


Previous Visit Info


There are 71 past projects with 76 measures.


Click here to view past measures


Project Documents


Download All 


QA/QC Report 

Signed Certificate of Completion/Inspection 

ISMs Report 

Audit Data 

Final Contractor Work Order 

Combustion Safety Form 

Installed and Inspected Measures

Once available, the QA/QC Report will give information about the project, along with the job scores the contractor has received for their work.



Weatherization Inspection

Abode Energy Management

339-707-0994

Inspection Information

Project ID: 3004645

Premise ID: 2054

Customer Name: [REDACTED]

Premise Address: 1 [REDACTED]

01747

Phone: 123-456-7890

Email: [REDACTED]

Inspector Name: Lead Vendor

Inspector Email: liilia+LV@energysavvy.com

Inspection Date: 06/18/2018

Inspection Start Time: 11:00 a.m.

Inspection Type: Post-visit Wx

Inspection Results

Overall Job
Score

4.22

Work Quality
Score

3.06

Documentation
Score

6.69

Customer Service
Score

5.50

QA/QC Result: Pass

Inspection Notes: Inspection summary notes, Inspection summary notes, Inspection summary notes.

Inspection summary notes.

Return Repair Visit Needed: Yes

Emergency Return Visit: Yes

Assign Return Work to: Previous contractor

Reason for Return Visit: Return visit notes, Return visit notes. Return visit notes.

Billing Adjustment Needed: Yes

Reason for Billing Adjustment: Billing adjustment notes Billing adjustment notes. Billing adjustment notes.