National Grid Workflow Automation - Return Visits in the QA Workflow

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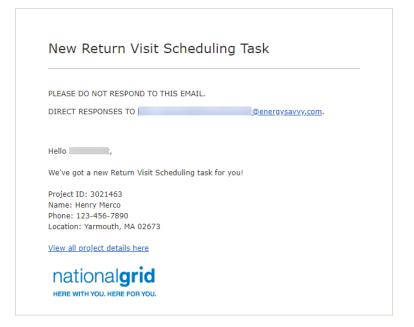
Created by EnergySavvy Edited/Distributed by Abode Energy Management for HPCs

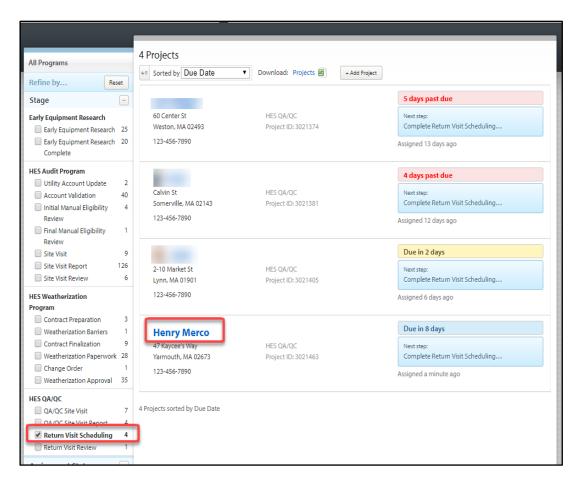
If you have questions regarding QA Reports, please email lnspections@AbodeEM.com or call 339-707-0994.

1. New Return Visit Assignment

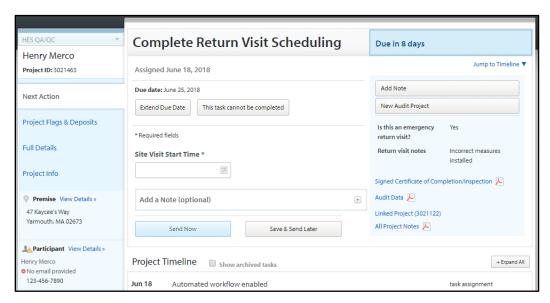
If a Return Visit is determined to be needed, the Return Visit Scheduling stage will be assigned to the contractor by the Lead Vendor, and the contractor will receive an email notification about the assignment:

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.

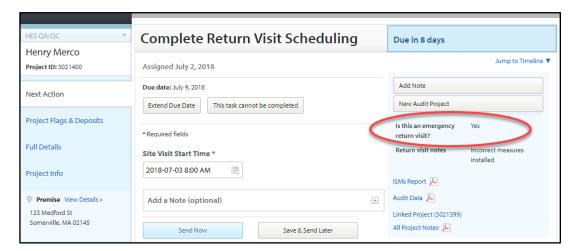




2. Complete Return Visit Scheduling

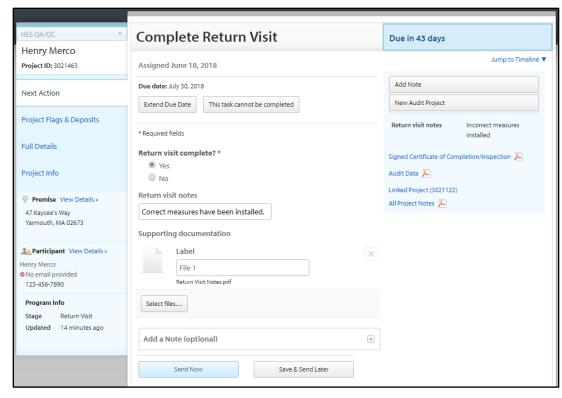


After opening the new Return Visit Scheduling task, the contractor will be presented with Lead Vendor return visit notes and other information in the project start data before moving forward with scheduling. Note that, if the return visit was designated as an "Emergency Return Visit", that information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



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.

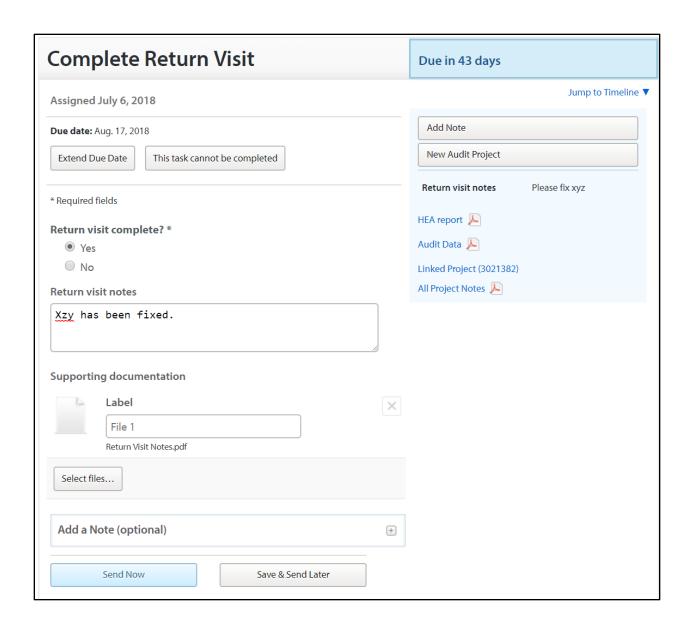


4. Return Visit Review

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.



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

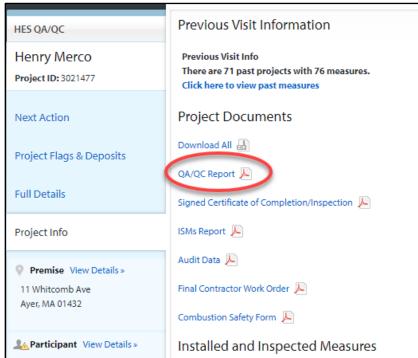


Upon completion of the task, the project will be once again sent to the review stage with the Lead Vendor, for a second review.

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.





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: Premise Address: 1

01747

Phone: 123-456-7890

Email:

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.