

# SPRINT 96

## Release Notes

APRIL 7, 2026

Deployment & Smoke Testing  
Scheduled for:

DATE 4/7/2026 | 4AM - 9AM PST

## Overview

- 1.) ESR Dashboard Enhancements
- 2.) ESR + AUD Roles: HPWH Survey Enhancements
- 3.) CSR + ESR Roles Can Copy Assessments
- 4.) CSR Role Can Merge Audits
- 5.) AUD Dashboard Enhancement: New “Merged” Tab to View Merged Audits
- 6.) Utility Invoice Builder Enhancement: New “From Inception to Date” Date Range Filter

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### 1.) ESR Dashboard Enhancements

Customer records with the “Merged” status can now be found in the “All Assignments” tab

All Assignments				
Priority	Status ▾ ↓	Status Date	Measure Type	A
<input checked="" type="checkbox"/>	Merged	03/31/2026	Lighting/Refrigeration	
<input checked="" type="checkbox"/>	Merged	03/31/2026	ASH-C Only	
<input checked="" type="checkbox"/>	Merged	03/31/2026	HPWH-Gas(Plumbing)	
<input checked="" type="checkbox"/>	Merged	03/31/2026	HPWH-Electric(Plumbing)	

The "Audits" tab displays records with a "Submitted" status and excludes audits with the “Merged” status. It also displays records with the "In Progress" status when a Scope Validation is being performed.

*Please Note: The “Audits” tab does not display records with the “In Progress” status when a contractor audit is being performed. Those records will only appear in the “All Assignments” tab.*

Now, the “Proposals” Tab will only display records where the “Proposed Date” field has been filled out by the ESR.

Previously, this tab displayed submitted audits that ESRs could propose. Those records can now be found in the “Audits” tab.

Proposals			
Status	Reference Number	Scheduled Date	Campaign Name
Proposed	LA0268580.4	03/31/2026	⋮
Proposed	LA0210479.1	04/01/2026	⋮

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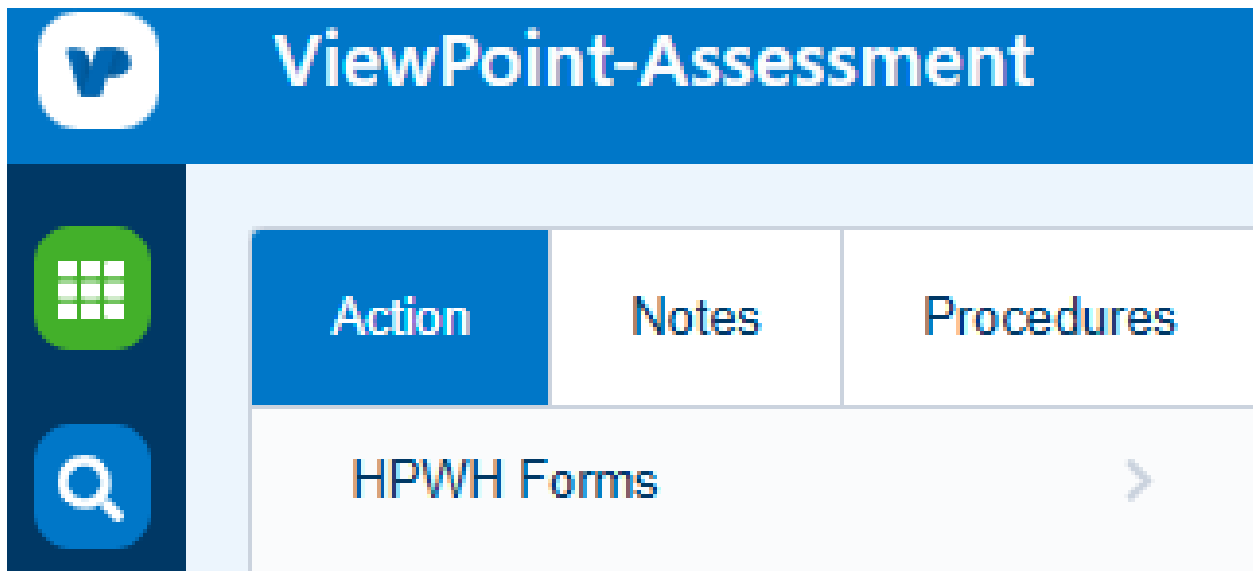
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## 2.) HPWH Form Enhancements

### New “HPWH Forms” Panel

When viewing an assessment, the HPWH Forms are now accessed by clicking on the “HPWH Forms” panel in the top left corner.



*Please Note: For ESRs and CSRs, this panel will appear once an assessment is created. For the AUD Role, this panel will only appear once the audit has been created.*

## HPWH ESR & Plumber Form Enhancements

The HPWH form has been renamed to "HPWH ESR & Plumber Form." The "View Survey As" options have also been updated to "ESR" and "Plumber." Electricians do not need to use this form — a separate form has been created specifically for the electrical components of a HPWH.

### **HPWH ESR & PLUMBER FORM**

This form is intended for completion by the ESR and Plumber that is assessing the Heat Pump Water Heater at this location. Please complete all sections before leaving the job site, as measurements, routing assessments, and panel observations are best captured in the moment.

#### **ESRs and Plumbers Only**

<b>View Survey As: *</b>	<b>Building Type:</b>
<input type="radio"/> ESR	<input type="text" value="Select..."/>
<input type="radio"/> Plumber	
<b>ASHRAE Building Type:</b>	

**Complete**

## New Electrician HPWH Form

Questions regarding the electrical components of a HPWH have been split into a separate form that can be found below the ESR & Plumber form.

### HPWH ESR & PLUMBER FORM

This form is intended for completion by the ESR and Plumber that is assessing the Heat Pump Water Heater at this location. Please complete all sections before leaving the job site, as measurements, routing assessments, and panel observations are best captured in the moment.

**ESRs and Plumbers Only**

View Survey As: \*

ESR

Plumber

ASHRAE Building Type:

Building Type:

Select...

[Complete](#)

### HPWH Electrician Form

This form is intended for completion by the electrician is assessing the electrical components of the Heat Pump Water Heater at this location. Please complete all sections before leaving the job site, as measurements, routing assessments, and panel observations are best captured in the moment.

**HPWH SPACE AND ELECTRICAL**

ELECTRICIANS ONLY

Electrician Form

No entries yet.  
Click the button below to add a new entry.

[Add Water Heater](#)

[Complete](#)

Electricians performing HPWH audits only need to fill out the Electrician Form.

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### 3.) CSR + ESR Roles Can Copy Assessments

*Please Note: To copy an assessment, the customer record must already have at least one existing assessment*

FOR ESRs:

1.) When viewing a customer record in the “All Assignments,” “Leads,” or “Priority” tabs, click on the ellipsis menu and select “View Assessment” to access the “Assessments” table



[View Assessment](#)

[Add to Calendar](#)

[View Notes](#)

## Assessments +

Assessment	Status	Status Date	ESR	Auditor
LA0234991.1	Qualified	04/03/2026	Tera Tolentino	⋮

1 - 1 of 1

2.) From the “Assessments” table, identify the assessment to be duplicated, expand the ellipsis menu and select “Copy Assessment”

## Assessments +

Assessment	Status	Status Date	ESR	Auditor
LA0234991.1	Qualified	04/03/2026	Tera Tole	⋮

📄 Copy Assessment  
✎ Edit Assessment

1 - 1 of 1

3.) A modal will appear prompting the user to confirm that they want to copy the assessment. Select “Copy” to proceed with duplicating the assessment

Copy Assessment?✕

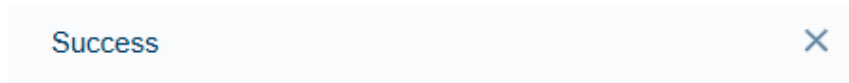
## Copy Assessment?

Are you sure you want to copy assessment LA0234991.1?

CancelCopy

4.) Users will be notified once the assessment has been successfully copied and the new assessment will appear in the “Assessments” table. In addition to assessment information being duplicated, the new assessment will have the same Assessment Status and Customer Eligibility Status as the original

assessment.



## Success

Assessment copied successfully.



### Assessments

Assessment	Status	Status Date	Measure Type	ESR
LA0234991.1	Qualified	04/03/2026	Lighting/Refrigeration	Tera Tolentino
LA0234991.2	Qualified	04/03/2026	Lighting/Refrigeration	Tera Tolentino

5.) The duplicated assessment contains all of the information entered into the parent assessment, including the Measure Type selection. Users will need to expand the ellipsis menu and select “Edit Assessment” in order to set the appropriate Measure Type for the copied assessment within the “Assessment” panel.

## Assessments

Assessment	Status	Status Date	Measure Type	ESR	
LA0234991.1	Qualified	04/03/2026	Lighting/Refrigeration	Tera Tolentino	⋮
LA0234991.2	Qualified	04/03/2026	Lighting/Refrigeration		⋮

Copy Assessment

Edit Assessment

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### Assessment

\* Prospect Status: 04/03/2026

Lead

\* Prospect Status Reason:

Moving to Assessment

\* Prospect Source:

ESR Walk-In

\* Measure Type:

Lighting/Refrigeration

ASH-C Only

Motors-Only

Lighting/Refrigeration

Refrigeration Combined

HPWH-Gas(Plumbing)

HPWH-Gas(Electrician)

HPWH-Electric(Plumbing)

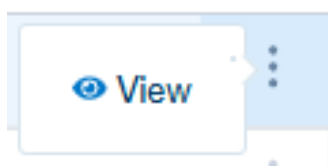
HPWH-Electric(Electrician)

Mixed Measures

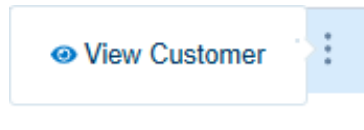
FOR CSRs:

1.) To access the “Assessments & Audits” table, search for a customer record through the Workspace or the “Assessments & Audits” search.

1A.) When accessing the customer record through the Workspace, expand the ellipsis menu and select “View”



1B.) When accessing the customer record through the “Assessments & Audits” search, expand the ellipsis menu and select “View Customer”



2.) When viewing the “Assessments & Audits” table, identify the assessment to be duplicated, expand the ellipsis menu and select “Copy Assessment”

Assessments & Audits + Merge

Assessment ID	Audit ID	Status	Status Date	Measure Type	ESR
LA0222199.1		Qualified	03/06/2026	<span style="background-color: #0070C0; color: white; padding: 2px 5px; border-radius: 3px;">Copy Assessment</span>	<span style="font-size: 1.2em;">⋮</span>

3.) A modal will appear prompting the user to confirm that they want to copy the assessment. Select “Copy” to proceed with duplicating the assessment

Copy Assessment? ×

## Copy Assessment?

Are you sure you want to copy assessment LA0222199.1?

Cancel Copy

4.) Users will be notified once the assessment has been successfully copied and the new assessment will appear in the “Assessments & Audits” table. In addition to assessment information being duplicated, the new assessment will have the same Assessment Status, Customer Eligibility Status as the original assessment.

Success ×

## Success

Assessment copied successfully.

Ok

Assessments & Audits +

Merge

Assessment ID	Audit ID	Status	Status Date	Measure Type	ESR
LA0222199.1		Qualified	03/06/2026	Lighting/Refrigeration	⋮
LA0222199.2		Qualified	03/06/2026	Lighting/Refrigeration	⋮

5.) The duplicated assessment contains all of the information entered into the parent assessment, including the Measure Type selection. To update the Measure Type for the new assessment, click on it within the “Assessments & Audits” table to highlight it, then click on the “Assessments” tab, where Measure Type can be updated within the “Prospecting Steps” panel.

Account   **Assessments**   Audit   Work Order   QAQC

Warranty   Customer Calls

Assessments & Audits + Merge

Assessment ID	Audit ID	Status	Status Date	Measure Type	ESR
LA0222199.1		Qualified	03/06/2026	Lighting/Refrigeration	⋮
LA0222199.2		Qualified	03/06/2026	Lighting/Refrigeration	⋮

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Prospecting Steps ▼

\* Prospect Status: 03/06/2026

Lead ▼

\* Prospect Status Reason:

Moving to Assessment ▼

\* Prospect Source:

ESR Walk-In ▼

\* Measure Type:

Lighting/Refrigeration ▼

ASH-C Only

Motors-Only

Lighting/Refrigeration

Refrigeration Combined

HPWH-Gas(Plumbing)

HPWH-Gas(Electrician)

HPWH-Electric(Plumbing)

HPWH-Electric(Electrician)

Mixed Measures

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### 4.) CSR Role Can Merge Audits

When all the audits associated with a customer record are in the “Submitted” status, the CSR is able to merge all line items into a single audit by clicking on the “Merge” button located above the “Assessments & Audits” table.

Assessments & Audits +



Assessment ID	Audit ID	Status	Status Date	Measure Type	ESR
LA0222199.1	LA0222199.1	Submitted	04/03/2026	HPWH-Gas(Plumbing)	⋮
LA0222199.2	LA0222199.2	Submitted	04/03/2026	HPWH-Gas(Electrician)	⋮

Clicking on the “Merge” button will trigger a modal asking the user to confirm they want to merge the audits

Merge Audit? ×

#### Merge Audit?

Do you want to merge all Audits? This will consolidate the data into the Audit with the most line items.

Cancel

Merge

The audit with the “Submitted” status will contain all the line items from the

merged audits. CSRs and ESRs should proceed with the workflow using the audit that has the “Submitted” status

Assessments & Audits + Merge

Assessment ID	Audit ID	Status	Status Date	Measure Type	ESR
LA0222199.1	LA0222199.1	Submitted	04/03/2026	HPWH-Gas(Plumbing)	⋮
LA0222199.2	LA0222199.2	Merged	04/03/2026	HPWH-Gas(Electrician)	⋮

Merging audits will also merge the HPWH Form responses as well. The audit will contain the form filled out by the ESR + Plumber during a HPWH Plumbing audit and the form filled out by the Electrician during a HPWH Electrical audit.

*Please Note: Once an audit is in the “Merged” status, the CSR and AUD Roles can no longer edit the line items. If line item changes need to be made after the merge, the CSR will have to make changes in the audit that has the “Submitted” status.*

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### 5.) AUD Dashboard Enhancement

#### New “Merged” Tab to View Merged Audits

Ready To Audit	Scheduled	In Progress	Submitted	Merged		
Status	Status Area	Reference Number	Scheduled Date	Measure Type	Max Meter kW	# of
Merged		LA0211918.2	04/01/2026	HPWH-Gas(Electrician)	4.51	⋮
Merged		LA0220652.3	04/01/2026	HPWH-Gas(Electrician)	7.91	⋮
Merged		LA0220652.2	04/01/2026	HPWH-Gas(Plumbing)	7.91	⋮
Merged		LA0244702.3	04/02/2026	HPWH-Gas(Electrician)	1	⋮
Merged		LA0244702.2	04/02/2026	Lighting/Refrigeration	1	⋮
Merged		LA0274199.3	04/02/2026	HPWH-Gas(Electrician)	18.11	⋮

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### 6.) Utility Invoice Builder Enhancement

#### New “From Inception to Date” Date Range Filter

Selecting the “From Inception to Date” option from the “Filter by Date Range” drop down list will show all records from 7/1/2025 to the current date.

