

AXIS for Utilities

Single-Family Performance Path

Updated July 19, 2018

Overview

AXIS is a cloud-based data collection and workflow management platform that allows data to be shared between Raters/verifiers, Providers, builders, utilities, Quality Assurance (QA), and program administrators participating in residential new construction programs. In addition to supporting the RESNET[®] energy rating protocols, AXIS allows for customization of functionality, visibility and workflows to meet program-specific needs.

AXIS is hosted by Pivotal Energy Solutions (Pivotal) and is licensed for use by NEEA. NEEA's licensing agreement provides northwest partners access to AXIS at no cost. Users have unique logins under a company profile and can access only the data with which the company profile is associated. Builders do not have logins at this time; however, builders may be provided a user account if desired.

NEEA partnered with Pivotal to use AXIS for the Northwest ENERGY STAR[®] Homes program and for homes participating in the Next Step Homes pilot. Energy Trust of Oregon uses AXIS for its EPSTM[™] for New Homes program. AXIS is now required for homes seeking incentives via the Single Family Performance Path.

Getting Started

All northwest utilities have a company profile in AXIS. Utilities can manage their company profile and users. If you have a user account, visit <https://neea.pivotalenergy.net/> to log in.

If you are new to AXIS and don't have a user account, contact [Jon Belmont at NEEA](#).

Data Structure

AXIS collects data via a "program" and Raters/verifiers are responsible for data entry. There are several programs in AXIS and each has unique data collection and workflow requirements (e.g. Single Family Performance Path, Energy Trust EPS, ENERGY STAR, Built Green, Earth Advantage, RESNET HERS). Programs may require REM/Rate[™] data, in-system checklist questions, calculators, QA, and notifications.

The Single Family Performance Path program in AXIS is named:

Utility Incentive V2 – Single Family Performance Path

This program is a region-wide core offering and contains three (3) calculators:

1. RTF Standard Protocol with NEEA adjustments and additions
 - a. To generate whole-home % improvement over code and savings
2. BPA Measure-life
 - a. To split the kWh savings into measure-life categories with applicable measure-rate and generate total reimbursement from BPA to the BPA customer utility

3. Builder Incentive
 - a. To display eligible builder incentive based on utility-specific qualifications

Each home within AXIS is assigned a unique Site ID. Data can be reviewed in the following ways:

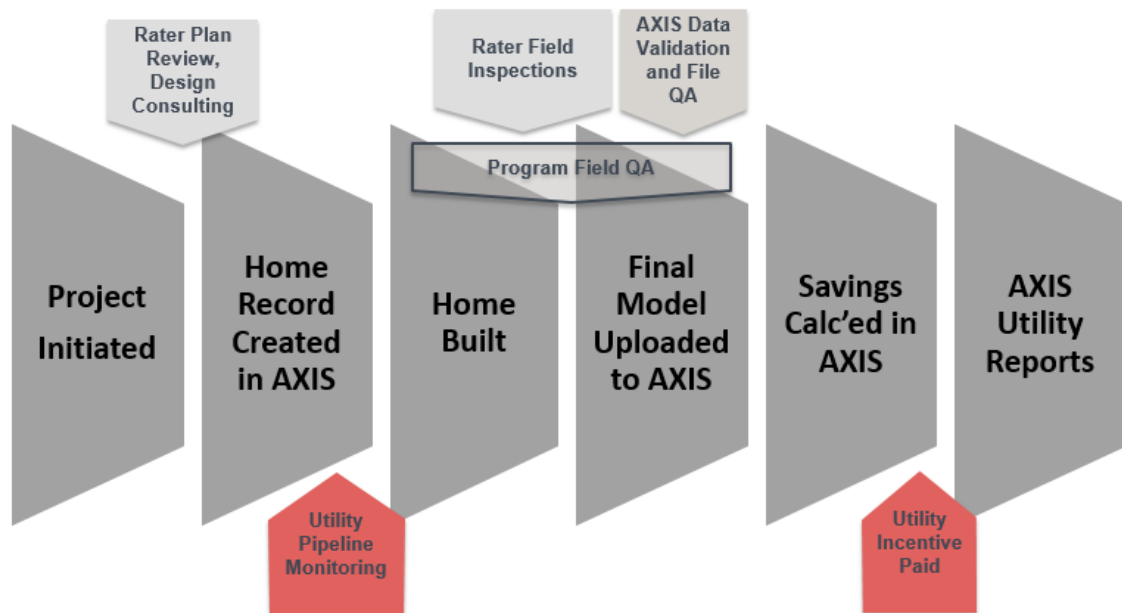
- Navigating to each home's Home Detail Page (single home)
- Downloading the Home Detail PDF (single home)
- Exporting to an Excel (single or multiple homes)

Data Workflow: Utility Incentive V2 – Single Family Performance Path

1. Raters/verifiers create a home record in AXIS, add the Utility Incentive V2 program, upload the REM/Rate model, and complete the minimum required data entry. Optional data entry fields are also available. As data is provided, in-system validations are performed to ensure regional and utility-specific minimums are met.
2. When the minimum required data entry is complete, the calculators provide real-time results:
 - a. Standard Protocol = Visible to raters/verifiers, utilities, and QA
 - b. BPA Measure-life = Visible to BPA-customer utilities, and QA
 - c. Builder Incentive = Visible to raters/verifiers, utilities, and QA (once configured)
3. If the REM/Rate model was preliminary, the Rater/verifier may upload a final model once field testing is complete. The calculators will update.
4. Rater/verifier completes remaining data entry and uploads documents.
5. Rater/verifier submits the home for review. A notification is sent to QA.
 - a. BetterBuiltNW is assigned to QA. Utilities may complete QA if desired.
 - b. All homes are reviewed prior to certification. Some may receive an official File QA per the QA Guidelines.
 - c. BetterBuiltNW will also coordinate Field QA with the Rater/verifiers and builders per the QA Guidelines.
6. QA is intended to prevent errors that may result in inaccurate savings. File QA provides a training opportunity for Raters/verifiers to increase their proficiency in modeling and compliance for utility programs.
 - a. If there are no issues with the home, QA will finalize the record by clicking "certify".
 - i. "Certify" must be interpreted to mean "final"
 - b. If QA identifies an issue, official File QA is added to the home and marked "corrections required", sending a notification to the Rater/verifier.
 - c. Rater/verifier receives notification, makes corrections, and re-submits the home.
 - d. QA receives a second notification and completes a second review.
 - i. These iterations may continue until all corrections are resolved.
 - e. QA will mark "Pass" and click "certify".
7. Once the home is certified, it is locked for edits and the savings and incentive are deemed final.
 - a. Rater/verifier and utility receive a notification that the home is complete.
8. Utility generate reports from the NEEA Utility Reports page

9. Utility may gather additional info from the builder and/or Rater/verifier
 - a. Documents may be uploaded by Rater/verifiers and utilities to the home records in AXIS
10. Utility approves the home for incentive and issues incentive check.
 - a. The utility may mark the home in AXIS as “approved for payment” using the Incentive Payments screen. This helps close the loop and give visibility of payment status.

General Work Flow



Reporting

The NEEA Utility Reports page is for utilities and contains four (4) reporting options:

1. Home Detail - PDF
 - a. One per home
 - b. Surfaces select program data
2. Raw Data – Excel
 - a. One home per row, multiple homes in report
 - b. Up to 400+ data fields (e.g., latitude/longitude, full QA results, full REM/Rate file inputs and outputs)
3. NEEA Utility Report – Excel
 - a. One home per row, multiple homes in report
 - b. About 50 data fields; Pre-selected data providing a streamlined summary of home characteristics
4. BPA Utility Report (Performance Path Calculator) – Excel
 - a. One home per row, multiple homes in report

- b. Exact data requested by BPA; used by BPA customer utilities for BPA submittal and reimbursement

Support Resources

Additional support resources and guides are available in the Support Portal. Utility-specific guides related to the Single Family Performance Path are:

1. [NEEA Utility Reports Page](#)
2. [Managing Notifications](#)
3. [Utility Incentives within AXIS](#)
4. [Processing Incentives within AXIS](#)
5. [How is Percent Improvement Calculated](#)

Utilities may also file a support ticket by clicking the “Help” button in the lower right corner of each page in AXIS or by emailing support@pivotalenergysolutions.com

Flexible Options and Future Developments

Contact [Jon Belmont](#) if you are interested in any of the following options:

1. Utility in the role of the Rater/verifier
 - a. Utilities may be provided a Rater/verifier profile if they are acting as the Rater/verifier for their program. Available now.
2. Utility in the role of QA
 - a. Utilities may be provided a QA profile if they are interested in completing their own QA. Available now.
3. Market-facing PDF Home Report
 - a. Some utilities have interest for a customized market-facing, BetterBuiltNW and/or utility branded PDF report. Additional feedback will help drive development.
4. Enhanced Program Metrics
 - a. Some utilities are interested in more metrics. Ideas include a partner leaderboard, a list of top measures installed, savings to date, and more visual elements like charts. Additional feedback will help drive development.
5. Connections from AXIS to internal systems
 - a. AXIS is a cloud-based system that may be connected to other databases or systems via API or other methods. Database connections provide secure and automated data transfers.
6. Reports
 - a. Custom reports and other market-facing documents are an option (Excel and PDF).