BetterBuilt^NW

Abridged AXIS Overview and Updates for Performance Path Utility Programs

This document provides an abridged overview of AXIS for utilities as a supplement to the Performance Path Overview presentation and webinars referenced below in the "Getting Started" section. This document will be updated as new features become available in AXIS.

Overview

AXIS is a cloud-based data collection and workflow management platform. It allows data to be shared between Raters/Verifiers, Providers, builders, utilities, quality assurance (QA) agents and program administrators participating in residential new construction programs.

The AXIS platform 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. Each user has a unique login under a company profile and can access only the data associated with that company's profile.

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

Getting Started

Every Northwest utility has a company profile in AXIS. Utilities can manage their company profile and users. If you have a user account, visit neea.pivotalenergy.net to log in.

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

Be sure to review the Utility Performance Path Overview for AXIS Presentation slides covered in the Performance Path Overview Recorded Webinar.

Data Structure

Raters/Verifiers are responsible for data entry and creating homes in AXIS. Each home is assigned a unique site ID and one or more "programs" will be assigned to each home. Several programs are available in AXIS and each has unique data collection and workflow requirements. Available programs include, but are not limited to, Single Family Performance Path, Energy Trust EPS, ENERGY STAR, Built Green, Earth Advantage and RESNET® HERS. Programs may require data such as REM/*Rate*™ model data, answers to in-system checklist questions, QA interactions, or supplemental document uploads. Each program may also incorporate unique calculators to generate outputs.

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 uses REM/*Rate* data, in-system checklist questions and three (3) calculators:

1. RTF Standard Protocol with NEEA adjustments and additions to generate whole-home kWh and Therm savings, and % improvement over code

2. BPA measure life 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 to display eligible builder incentive based on utility-specific qualifications

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 Excel (single or multiple homes)

General Work Flow
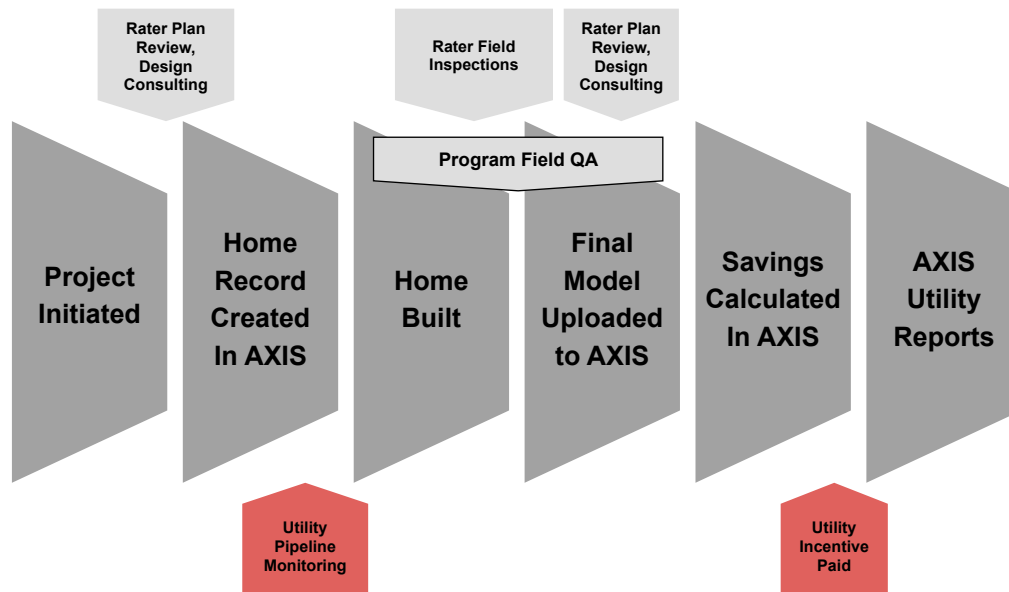
Data Workflow

1. Raters/Verifiers create a home record and complete minimum required data entry.

2. In-system validations are performed to ensure regional and utility-specific minimum requirements are met. Calculators provide real-time results.

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. Raters/Verifiers complete remaining data entry and upload documents.

5. Raters/Verifiers submit the home for review and certification. A notification is sent to the QA team.
   a. All homes receive file review prior to certification.
   b. Official File and Field QA will occur as defined in the Performance Path QA Overview.
   c. BetterBuiltNW is currently assigned to the QA role. Utilities may conduct QA for their program if so desired.

6. QA activities are designed to prevent errors that may result in inaccurate savings. QA provides a training opportunity for Raters/Verifiers to increase their proficiency in modeling and compliance for utility programs.
   a. If no issues arise from QA review, QA team will finalize the record by clicking "certify."
   b. If QA team identifies an issue with the home, 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 team receives a second notification and completes a second review.
   e. Iterations may continue until all corrections are resolved.
   f. QA team will mark the home "Pass" and click "certify."

7. Once the home is certified, it is locked for edits. The savings and incentive are deemed final. The Rater/Verifier and the utility will receive a notification that the home is complete.

8. The utility generates reports from the NEEA Utility Reports page, approves the home for an incentive, and issues the incentive check.

Reporting

The NEEA Utility Reports page 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

3. NEEA Utility Report—Excel

    a. One home per row, multiple homes in report

    b. About 50 data fields

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

    c. This report is automatically emailed to BPA customer utilities each month

On the landing page of AXIS, there are also metrics tables with Performance Path summary results. Let us know if you have feedback on the reports or metrics.

Support Resources

Additional resources and guides are available in the AXIS Support Portal. Utility-specific guides related to the 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 or email info@BetterBuiltNW.com if you are interested in any of the following:

1. Utility in the role of the Rater/Verifier

2. Utility in the role of QA

3. Customized market-facing PDF

4. Other metrics or reports

5. Connections from AXIS to internal systems