Quick Start Guide: Your NGBS Green Portal Powered by AXIS

The NGBS Green certification program is powered by the AXIS online portal. Once an account is set up, clients can access project information 24/7.

Below are the necessary steps.

1. **REGISTER**

   Register for a new NGBS online portal account, here. Everyone needs an account.

   When we migrated all our program data to the AXIS platform, many names / companies were imported from the legacy NGBS Green database, so you may already have a portal account even if you have not previously registered. If this is the case, you will receive a message during registration indicating that you need to reset your password. If you receive a message that an account with that email address already exists, click here to reset your password.

2. **CUSTOM COMPANY CONFIGURATION**

   Once you register, there are several set-up steps we recommend. The steps are listed here in recommended order of completion – each step inks to a document that provides instructions and a video on the process. Some of the steps are relevant only to your "company administrators," denoted by "Admins Only." Only one "company administrator" needs to complete those steps, and general "users" may skip those steps entirely.

3. **SET UP NOTIFICATION PREFERENCES**

   AXIS lets you choose how to receive program notifications. You can select how to receive portal notifications – or turn some notifications off entirely – by modifying settings in the "Message Center."

4. **NGBS GREEN PROGRAM AGREEMENTS**

   Client agreements will now be signed via DocuSign on the AXIS portal. Clients can also upload an updated certificate of insurance directly to the portal, as needed. See more here.

5. **NGBS GREEN CERTIFICATION FEE INVOICES**

   Home Innovation will continue to generate certification fee invoices and request payment at the rough inspection stage. However, clients can also generate invoices, if preferred, and customize the invoices to include as many buildings as desired on one invoice. Nothing has changed in terms of the way you pay NGBS Green invoices. Once you submit payment, the NGBS Green team will update the database for each project, and you can see the payment(s) applied to the project. See more here.

6. **NGBS GREEN CERTIFICATES**

   To print an NGBS Green certificate for a building, navigate to the building using either the Project Status page or by using the AXIS master search field on the right side of the menu bar. Once on the project detail page, click the "Reports" button and select "Scoring Path Certificate." This will generate an auto-populated PDF version of the NGBS Green certificate that you can save, email to others, and/or print. Print as many copies as you need for no additional fee.

7. **NGBS GREEN PROJECT STATUS**

    NGBS Green clients can view a project's certification status using the "Reports -> Project Status" page. Use the filters on the left side of the Project Status page to filter the information. The table shown on that page will be updated based on your filter selections, and you can export the table contents to Microsoft Excel using the red "Export Data" button in the bottom left corner of the page. See more here.

WE ARE HERE TO HELP!

There are lots of ways to get the help you need if you are having problems navigating the new NGBS Green portal even after following these steps. If you need AXIS help, you can:

- Submit a request for assistance here.
- Send an email to support@pivotalenergysolutions.com.
- Call 1.800.980.AXIS (2947).
- Use chat function available from the portal's landing page once you are logged in.

For NGBS Green program help that is not related to the AXIS portal, contact the NGBS Green team at Home Innovation.