

Fitwel Portal Guide: Building and Site Scorecards





Introduction

The Fitwel Portal is a user-friendly digital platform that project teams use to advance through the Fitwel Certification process. The Portal is where project teams should register and pay, benchmark, and submit a single project or an entire real estate portfolio for Fitwel Certification. The Portal includes an interactive data-driven dashboard that allows companies to:

- organize projects seeking Fitwel certification into designated portfolios,
- assess their projects against the Fitwel strategies,
- access a gap analysis to understand how a project can be further optimized,
- advance through the project review process
- track the status of projects, and
- learn how their projects are successfully impacting people through each of Fitwel's Seven Health Impact Categories.

The Fitwel Portal Guide provides instructions and insights on how to efficiently use the Portal to register and submit projects for Fitwel Certification and Recertification using Building and Site Scorecards. If you are looking for information on how to use the Fitwel Portal for the Viral Response Module, please **download the Fitwel Portal Guide: Viral Response Module at [fitwel.org/resources](https://www.fitwel.org/resources).**

For any additional questions or feedback, reach out to info@fitwel.org.

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1 Creating a User and Company Account

Create a User Account

A Fitwel user account is created to gain access to the Fitwel Portal and manage projects advancing through the Fitwel certification process. Company accounts allow you to see a list of all projects and modules within your company that are advancing through the certification process.

Create a user account at app.fitwel.org/register. Upon completion you can sign in at anytime at app.fitwel.org.

Sign in to your Fitwel Account

E-MAIL
E-mail

PASSWORD Forgot Your Password?

Sign in

→ Create a New Account

Create or Link to a Company Account

To join an existing account, request an account invitation from a team member. To create a new company account, navigate to the dropdown arrow next to your name and create a new **Company Account** by selecting **Add a New Account**. Once you have filled out the mandatory information, select **Save**.

My Dashboard Fitwel.org Reena Agarwal ▾
User

→ Add New Account
My Profile

2 Managing Your Dashboard

Access Your Dashboard

Your account dashboard is organized as follows:

- **Portfolios.** Portfolios are created to organize all of your projects seeking Fitwel certification.
- **All Projects.** All buildings and spaces registered within your account.
- **Viral Response.** All modules registered for Fitwel Viral Response certification.

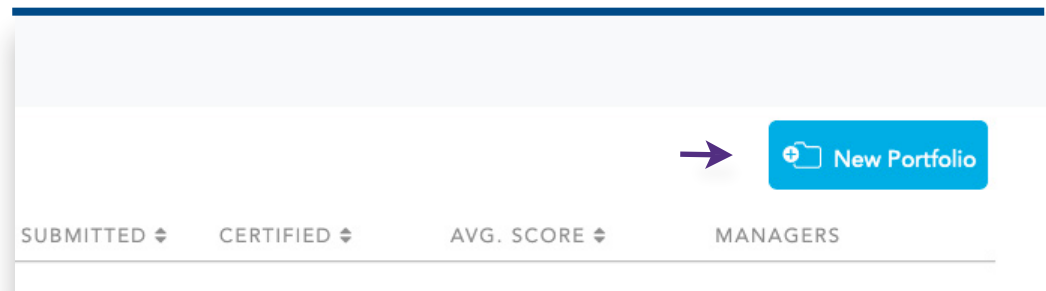


Create a New Portfolio

Portfolios are created to organize all of your projects seeking Fitwel Building Certification. Portfolios can be created to reflect your internal organizational structure (i.e. by region, team, consultant, etc.)

Select an Account Name and create a portfolio by clicking **New Portfolio** on your Account dashboard.

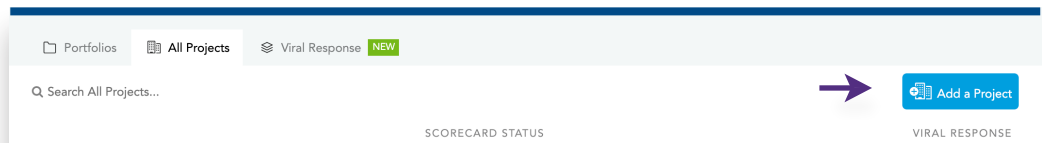
Click on the arrows in the **Portfolio** heading to sort the projects by average scores, portfolio manager, or date started, benchmarked, or certified.



3 Registering and Paying for Projects

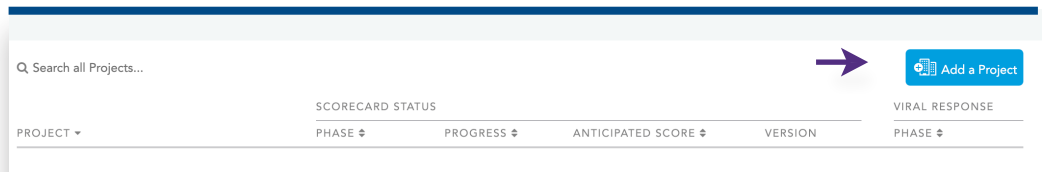
Project Payment

To pay for your project registration and certification fees at one time, navigate to the **All Projects** tab on your Account and select the **Add a Project** button.



Or, once a portfolio is created, you can pay for a project by clicking on the **Add a Project** button.

For instructions on registering and paying for a Fitwel **Viral Response** module, download the Fitwel Portal Guide: Viral Response Module on fitwel.org/resources.



Project Payment (continued)

- Select the portfolio in which you would like to add this project. **Input the project name.**
- **Select the project type (Building or Site)** for which you would like to pay. At minimum, you must pay a registration fee to begin a project.
- Register and pay for additional projects or modules (optional).
- **Select "Confirm Information + Pay" to input your billing information.**
- The Project Size and Scorecard fields cannot be edited once payment has been made.

Select the gray "Fitwel Registration and Certification Payment Guide" to learn more about the Fitwel certification pathways and associated costs.

New Project Registration Cancel

[Fitwel Registration and Certification Payment Guide](#)

PORTFOLIO* Your Portfolio Name	PROJECT TYPE* Building
PROJECT NAME* Your Project Name	PROJECT SIZE (SQ.FT.) 50,000
<input checked="" type="checkbox"/> Project Registration	\$500.00
<input checked="" type="checkbox"/> Add Design Certification ⓘ	\$6,000
<input type="checkbox"/> Add Built Certification ⓘ	\$4,800 20% recertification discount applied
<input type="checkbox"/> Viral Response Approval Included within the certification fee for projects registered and paid prior to December 15, 2020.	\$200.00

Register another project Register another module

Project Billing

Input your billing and payment information. Select Complete Payment to finish paying for your project registration and certification fees.

A copy of the invoice will be sent to the email address provided here, as well as the user account from which the invoice was generated.

Payment Information

Provide billing details below. A copy of the receipt will be sent to the email address provided below

FIRST NAME*

LAST NAME*

COMPANY NAME*

EMAIL*

BILLING ADDRESS*

COUNTRY*

STATE*

CITY*

POSTAL CODE*

Cancel

Back

Complete Payment

Project Billing

Select a payment option (**Credit Card or Invoice**). Note that if you select **Generate Invoice**, the project will be on hold until payment is received.

PAYMENT OPTIONS

Credit Card
Generate Invoice

CARD NUMBER

4111 1111 1111 1111

EXPIRATION DATE

MM/YYYY

SECURITY CODE

123

Subtotal: \$12,500.00

Credit Card Fee: \$362.50

Total: **\$12,862.50**

[Back](#)

[Submit Payment](#)

Project Invoice

On the final screen, you can view, save, or print the invoice generated.

Select **Finish** to close out of this screen or **New Payment** if you would like to pay for a new project.



Center for Active Design, Inc.
110 Wall Street, 4th Floor
New York, NY 10005
(212) 227-2831
www.centerforactivedesign.org

INVOICE

BILL TO

First Name Last Name
Your Company Name
Your Address Here
Toronto, Ontario 416
(info@fitwel.org)

INVOICE# 76-414
Date: 05/30/2019
Payment Due Upon Receipt

PROJECT NAME	CERTIFICATION TYPE	AMOUNT
Your Project Name	Registration Fee	\$500.00
Your Project Name	Design Certification Fee	\$6,000.00
Total:		\$6,500.00
BALANCE DUE:		\$6,500.00

Payment Options:

Pay by Check: please make checks payable to "Center for Active Design, Inc."

To pay by Wire/ACH:

Signature Bank
Account #: 1503021753
Routing #: 026013576
International bank code: SIGNUS33

**NOTE: Please list your Invoice Number in your funds transfer

For all billing-related questions, email finance@fitwel.org



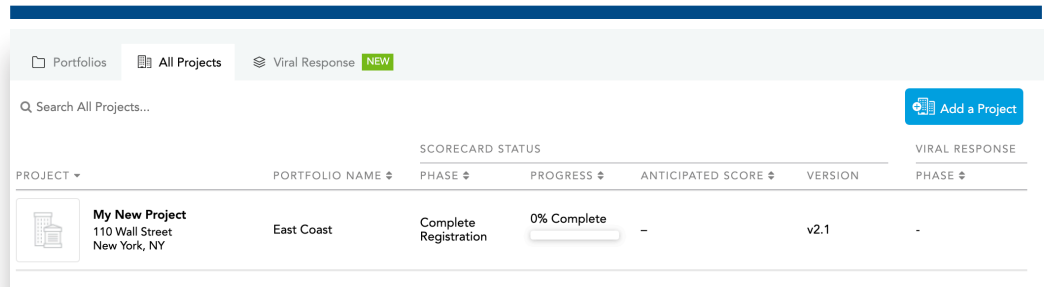
Print

Finish

New Payment

Complete Registration

Select your Project from your **Portfolio** dashboard or from the **All Projects** tab.



Input Project Information

Fill in the project information on the **Create Project** page. In the **Name** field, select a project name (only those projects for which the registration fee has been paid will appear). If your project name does not appear here, you can select **+ New Project** to pay for a new project. If you have not done so already, select the corresponding portfolio in which you would like the project to belong, and then input the rest of the project information.

Create Project

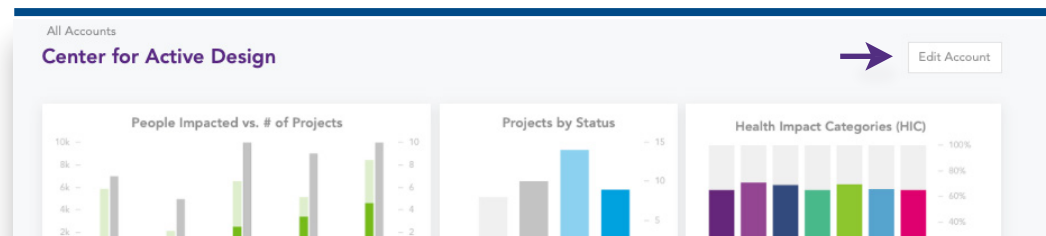
PROJECT TYPE Design Certification	PROJECT NAME MFR
SCORECARD* Multifamily Residential	PORTFOLIO 1. v2.1 Projects
PROJECT SIZE(SQ.FT)* 5,000 ft ²	PART OF A CAMPUS* No
SELECT YES IF YOU WOULD LIKE TO DISPLAY YOUR PROJECT ON THE PUBLIC FITWEL DIRECTORY.* Yes	

4 Invite Project Collaborators

Select Portal Level to Add Project Team

The Fitwel Portal is organized by the following user types: **Company Lead:** Fitwel's point of contact(s), who can invite members to collaborate on a Project; **Portfolio Manager:** Team lead(s) who can create the structure for organizing projects into portfolios on the Fitwel Portal and can invite project collaborators; and **Collaborators:** Team members who can be added to collaborate on one or multiple projects within a company's account.

Click on the **Edit Account, Edit Portfolio, or Edit Project** button, depending on the level at which you would like to invite the user (Account, Portfolio, or Project).



Add Project Team

Add your team members to your project, portfolio, and/or account to start collaborating on Fitwel certification together. Click **Save** after completing the steps above.

The 'Edit Account' form is divided into two main sections. The left section contains a 'COMPANY NAME*' field with 'CiAD' entered, a 'DESCRIPTION' field, and 'Account Details' showing '1 Project Registrations' and '1 Project Certifications'. The right section lists user roles: 'COMPANY LEAD' (one 'Fitwel User'), 'PORTFOLIO MANAGER(S)' (one 'Fitwel User'), and 'COLLABORATOR(S)' (two 'Add' buttons). A 'Save' button is in the top right corner.

5 Complete the Digital Scorecard

Respond to Each Strategy

Click on the project name on the dashboard to access the Fitwel Digital Scorecard. Select **Yes**, **No**, **Not Applicable**, or **Alternative Compliance** to each listed strategy.

The screenshot displays the Fitwel Digital Scorecard interface. At the top left is a map showing the project location with labels for 'Magazine store', 'Bakery', and 'Panaderia Yoli'. To the right of the map is a 'Health Impact Categories (HIC)' bar chart with a scale from 0% to 100%. Further right is the 'Anticipated Fitwel Score' section, which shows a score of 121 based on current answers, with a progress bar and a 'START DATE' of 4/24/2017. Below these are navigation links for 'Scorecard Summary', 'Benchmark', and 'Submit'. The main content area is titled 'Outdoor Spaces' and lists two strategies, each worth 3.1 / 4 points. The first strategy asks for an outdoor space amenity accessible from a building entrance to all regular occupants. It has three response buttons: 'Yes', 'Alternative Compliance', and 'No'. Below the buttons is a 'Documentation Requirements' section with a dropdown arrow. The second strategy is identical but includes a 'Read Why This Strategy Matters' link. A blue arrow points to the 'Yes' button of the first strategy.

Benchmark Project

Once you have responded to each strategy, benchmark the project by selecting the **Benchmark** button at the top of your Digital Scorecard

Benchmarking a project archives the project responses at a moment in time, allowing you to document the project's improvement over time. Project benchmarking is unlimited and does not require documentation to be uploaded to the Portal.

← 1.Client Projects

CI Space A
504 Broadway, New York

Edit Project

Health Impact Categories (HIC)

Anticipated Fitwel Score
111
90 105 125
START DATE 7/27/2018

Progress Toward Certification
0 strategies remaining

☐ Only Show Incomplete Sections

Scorecard Summary Benchmark Submit

1 Location 17 points ✓

2 Building Access 4 points ✓

3 Outdoor Spaces 4 points ✓

4 Entrances and Ground Floor 9 points ✓

5 Stairwells 14 points ✓

6 Indoor Environment 14 points ✓

7 Workspaces 8 points ✓

8 Shared Spaces 18 points ✓

9 Water Supply 3 points ✓

10 Cafeterias and Prepared Food Retail 9 points ✓

11 Vending Machines and Snack Bars 8 points ✓

12 Emergency Procedures 3 points ✓

Emergency Procedures

12.1 / 0.67 points

Create and maintain a database of emergency equipment and supplies

Rationale & Sample Evidence Upload Required Documentation

Yes No 1 Document Uploaded

12.2 / 2.66 points

Install an Automated External Defibrillator (AED) on each floor and adopt a regular testing schedule

Rationale & Sample Evidence Upload Required Documentation

Yes No 1 Document Uploaded

12.3 / 1 point

Ensure that there is one certified first responder (CFR) per 100 regular occupants present during work hours

Rationale & Sample Evidence Upload Required Documentation

Yes No

12.4 / 4.33 points

Upload Compliance Documents

Select the **Attach Documents** button within each strategy to upload the required compliance documents listed in the **Documentation Requirements** section.

Building Access

2.1 / 1.12 points

Provide a universally accessible pedestrian route between the main building entrance and a transit stop

Rationale & Sample Evidence [?](#)

Attach Documents

[Documentation Requirements](#)

REQUIREMENTS	COMPLIANCE DOCUMENTS
Connect the main building entrance to a minimum of <u>one</u> transit stop by a pedestrian route that: <ol style="list-style-type: none">is free of obstacles that may impede or cause difficulties for those with physical disabilities, such as impeding trees, planting pots, bike racks, steps, or other barriers.includes pedestrian crossings at street intersections. <p>OR</p> Achieve credit for BREEAM In-use USA or International credit TRA 02 - Proximity to public transport credit(s) 4 or 8	Submit a minimum of <u>one</u> of the following: <ol style="list-style-type: none">A minimum of <u>one</u> annotated map clearly detailing <u>all</u> the following:<ul style="list-style-type: none">the location of a main building entrancethe location of a minimum of one transit stopthe walking paththe pedestrian crossingsA minimum of <u>three</u> annotated photographs showing <u>all</u> of the following:<ul style="list-style-type: none">the main building entrancethe transit stopthe walking paththe pedestrian crossingsDocumentation showing the receipt of BREEAM credit TRA -4 - Pedestrian and cyclist safety for the provision of safe and secure pedestrian and cycle access routes. <p>OR</p> Submit receipt of the qualifying equivalent standard.

Submit the Project for Review and Certification

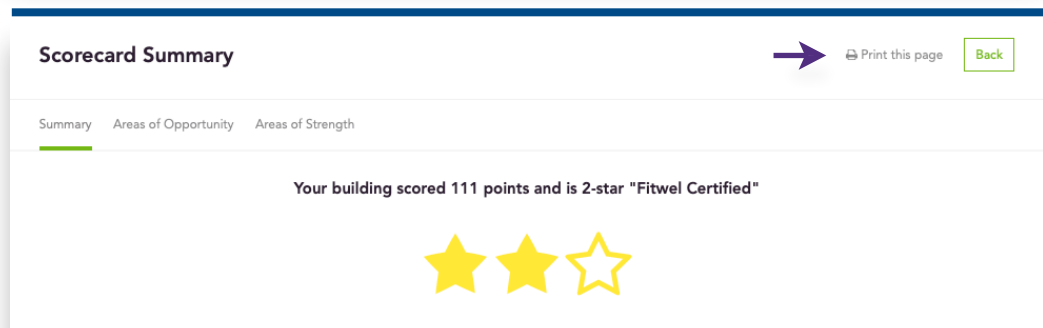
A green check mark will appear next to the total points achieved in each section to indicate that all of the required documentation has been uploaded. Once the green check mark appears, and the project dashboard shows 0 Strategies Remaining, the gray Submit button will turn blue.

Select **Submit** to send the project in for review and certification. If the project certification fee has not been paid, a payment screen will appear. Refer to Step 3 for instructions on paying for the certification fee.

Review the Scorecard Summary, Areas of Strength, and Areas of Opportunity

This section summarizes the project's areas of strength and areas of opportunity. Together, this information provides a gap analysis that can be used to prioritize future investments.

Click on **Scorecard Summary** to review a summary of the project's responses, score, strengths, and opportunities.



6 History of Compliance Documentation (for v2.1 projects only)

View Project Documentation History

Select **Show Documentation History** under each Fitwel Strategy. You can view and download all of the previously uploaded documentation for both the Design and Built Certifications.

Outdoor Spaces

3.1 / 4 points possible

Provide an outdoor space amenity that is accessible from a building entrance to all regular occupants.



Rationale & Sample Evidence [🔗](#)

Yes

No

Fitwel Comments

Review & Respond ▾

Upload Documents

3 documents attached ▾

Show Documentation History ▾

Documentation Requirements ▾

Hide Documentation History ▴

DESIGN CERTIFICATION

Yes

Alternative Compliance

No

Approved
2/6/19

Comments

Download All

sitemap.pdf

floorplan_G-14.pdf

Groundfloor Signage.doc

Show 15 More Documents

BUILT CERTIFICATION

Round 1
2/6/21

Comments

Download All

sitemap.pdf

floorplan_G-14.pdf

Groundfloor Signage.doc

another document.xlsx

more documents.zip

even more documents.jpg

Documentation Requirements ▾

7 Project Review Process

Project Review

The Fitwel Certification Team uses the Fitwel Portal to communicate with users during the project review process. Once the Fitwel Certification Team has completed the initial review for your project, you will receive an email notification to review comments in the Fitwel Portal. You will have one opportunity for a formal response, which must be completed within 4 weeks. Fitwel guarantees the review process will be completed within 12-16 weeks depending on the project team's status as either a Fitwel Champion, Affiliate, Ambassador, or General Fitwel User. The timing also depends on how fast your project team responds to Fitwel's Initial Review.

Navigate to your **Project Scorecard** to review and respond to comments from the Fitwel Team.

The **number of comments** that necessitate a response from you is shown next each of the corresponding sections. You can download the entire Initial Review as a PDF document.

The screenshot shows the 'Outdoor Spaces' section of a project review. On the left is a navigation menu with four items: 1. Location (11 points / 3 comments), 2. Building Access (2 of 4 / 9 comments), 3. Outdoor Spaces (8 points / 4 comments), and 4. Entrances and Ground Floor (6 points / 1 comment). The 'Outdoor Spaces' item is highlighted with a yellow circle and a '1' icon, indicating one comment. The main content area is titled 'Outdoor Spaces' and shows a score of '3.1 / 4 points possible'. Below this is a requirement: 'Provide an outdoor space amenity that is accessible from a building entrance to all regular occupants.' There are 'Yes' and 'No' buttons. A 'Fitwel Comments' panel is open on the right, showing a placeholder text: 'Respond to Fitwel...' and a 'Save' button. A purple arrow points from the 'No' button to the 'Respond to Fitwel...' field.

Submit for Final Review

Once you have addressed all the comments within your project, you can select the **Respond to Fitwel** button to submit the project for a Final Review from the Fitwel Certification Team.

The screenshot displays the Fitwel portal interface for a project titled "Outdoor Spaces". At the top, there is a navigation bar with three items: "Download Initial Review" (with a download icon), "Scorecard Summary" (with a list icon), and "Respond to Fitwel" (with a right-pointing arrow icon). A purple arrow points to the "Respond to Fitwel" button. Below the navigation bar, the main content area is titled "Outdoor Spaces" and shows a score of "3.1 / 4 points possible". The text reads: "Provide an outdoor space amenity that is accessible from a building entrance to all regular occupants." To the right of this text are several icons: a purple square, an eye, a red heart, a list, a smiley face, a bar chart, and an apple. Below the text is a section for "Rationale & Sample Evidence" with a checkmark icon. There are two buttons: "Yes" (highlighted in blue) and "No". Below these buttons is a document upload section with the text "Upload Documents" and a paperclip icon, followed by "3 documents attached" and a dropdown arrow. At the bottom, there are two links: "Show Documentation History" with a paperclip icon and a dropdown arrow, and "Documentation Requirements" with a checkmark icon and a dropdown arrow. On the right side of the interface, there is a yellow box containing the text "Fitwel Comments" and "Review & Respond" with a dropdown arrow.

8 Certification Recognition

Receive Project Certification

After the review process is complete, a certificate is issued for the project stating the number of points earned along with the Fitwel Star Rating achieved.

Project teams may order a plaque or decal from greenplaque.com, using your project's ID number.

Refer to the [Fitwel Marketing Guidelines](#) for additional resources.

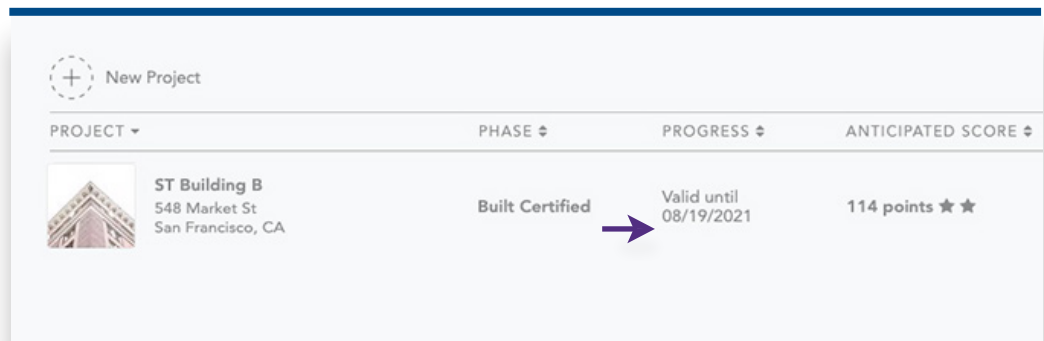



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9 Recertification

Start the Recertification Process

Your Fitwel Certification remains valid for three years from the date on which it received its initial certification. The recertification option will be available on the Fitwel Portal after a project is awarded its initial certification. A notification will appear in the Progress column on your project dashboard to keep you updated on recertification timing.

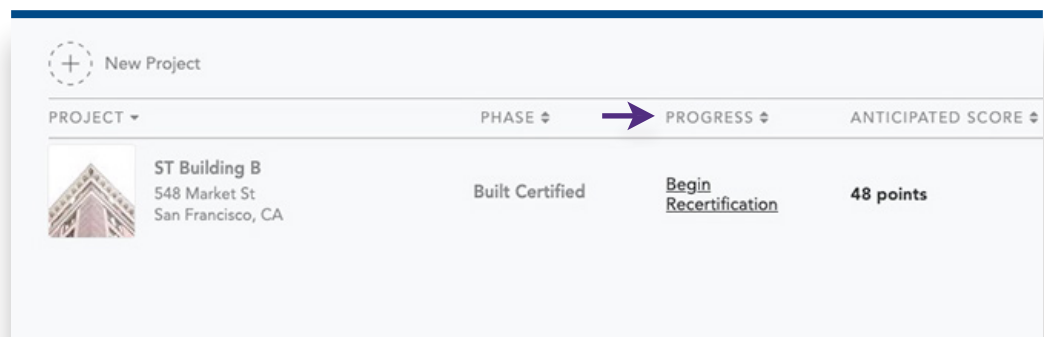



PROJECT	PHASE	PROGRESS	ANTICIPATED SCORE
 ST Building B 548 Market St San Francisco, CA	Built Certified	Valid until 08/19/2021	114 points ★★

Payment

On the Project Dashboard, hover over the “Valid until Date” text in the Progress column and click **Begin Recertification** to activate the payment screen.

Projects that submit for recertification within a year following the expiration of their 3-year certification period are eligible for a reduced certification rate of 80% of prevailing fees. Any project that submits for recertification after one year from the expiration date is subject to the prevailing certification fees.



PROJECT	PHASE	PROGRESS	ANTICIPATED SCORE
 ST Building B 548 Market St San Francisco, CA	Built Certified	<u>Begin Recertification</u>	48 points

9 Recertification

Project Registration for Recertification Cancel

[Fitwel Registration and Certification Payment Guide](#)

PORTFOLIO*	[Insert Portfolio Name] ▼	
PROJECT NAME*	[Insert Project Name] ▼	PROJECT SIZE (SQ.FT.) 50,000
	<i>Design Certified: (September 15, 2018)</i>	
Project Registration		\$500.00
<input type="checkbox"/> Add Built Certification ⓘ		\$4,800 20% recertification discount applied

[Register another project for recertification](#)

Subtotal:	\$5,300.00	Enter Payment Information
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Project Scorecard

You are now able to access your project's scorecard and respond to each Fitwel Strategy. If any of your project's base information has changed (size, number of occupants, etc.), you may update this information by selecting **Edit Project** on your project scorecard page.

Within each of the strategies you will see a section titled **Documentation History**. This area includes your project's initial certification response, review comments, and uploaded documentation.

Continue through the same process noted in [Step 5](#). Note that the new comments, documentations, and review responses will appear on the right hand side under **Show Documentation History**.

For details on how to advance through the project review and certification process, refer to [Steps 7-8](#).

← CfAD Recertification Previously Certified: 10/23/2019

Recertification Single-Tenant Project

ID# 73777318
538 Broadhollow Rd- Suite 311, Manchester ➔ Edit Project

Health Impact Categories (HIC)

Category	Score
Indoor Air Quality	100%
Water	100%
Energy	100%
Greenhouse Gas	100%
Land Use	100%
Transportation	100%
Other	100%

Anticipated Fitwel Score: 17 (STARTED 10/1/2019)

Progress Toward Built Certification: 72 strategies remaining

Scorecard Summary | Benchmark | Pay for Recertification

- 1 Location 0 of 4
- 2 Building Access 0 of 6
- 3 Outdoor Spaces 0 of 8
- 4 Entrances and Ground Floor 0 of 8
- 5 Stairs 0 of 6
- 6 Indoor Environment 0 of 8
- 7 Workspaces 0 of 5
- 8 Shared Spaces 1 of 13
- 9 Water Supply 0 of 3
- 10 Prepared Food Areas 0 of 4

Indoor Environment

6.1 / 3.08 points

Establish and implement a tobacco- and smoke-free policy for all indoor areas

Rationale & Sample Evidence

Yes Alternative Compliance No

Attach Documents

Documentation Requirements

Show Documentation History

DESIGN CERTIFIED

Yes Alternative Compliance No

Approved 10/23/19

No Comments | Download All

Tulips...jpg (23Oct19)