SEATTLE ENERGY BENCHMARKING & REPORTING

HOW TO GUIDE

Step-by-step instructions to use the U.S. EPA's Portfolio Manager to comply with the City of Seattle's Energy Benchmarking and Reporting requirements.

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Seattle
Office of Sustainability
& Environment

What is Energy Benchmarking?

First time benchmarking? *Watch the Introduction to Benchmarking training video for more information on energy benchmarking and reporting requirements.*

Benchmarking tracks the total electricity, natural gas, steam, or other utilities used in a building (often called energy or building performance). The U.S. EPA's ENERGY STAR Portfolio Manager is the standard for benchmarking. This How to Guide shows how to benchmark a building to determine the building's:

- **Energy Use Intensity** (EUI), which indicates the building's energy use per square foot (kBtu/sq. ft.) per year. A lower score indicates a more efficient building.
- About 20 types of buildings will also receive a 1-100 **ENERGY STAR** rating. A higher score indicates a more efficient building.

See How Your Building's Energy Use Stacks Up!

Tip *Watch the Understand Results and Create Reports training video to learn how to interpret your results and identify opportunities for energy savings.*

When you are finished benchmarking, compare your building's energy use intensity (Site EUI), which is its annual energy use per square foot with other similar types of buildings in Seattle at **www.seattle.gov/EnergyBenchmarkingMap**. The information is based on data analyzed from buildings 20,000 SF or greater that had energy use reported to the City, as required by the Seattle Energy Benchmarking and Reporting law.

STEP 1 Get Started

Tip Watch Data Collection (Part A): Property Use Data and Data Collection (Part B): Energy Meter Data for more detailed instructions and resources for collecting required data.

☐ Confirm the accuracy of the information provided about the building on the notification and/or warning letter sent by the City of Seattle. This includes:

1. Building size
2. Building address
3. Year built
4. Building owner or property manager

To correct errors, please contact the Benchmarking Help Desk at energybenchmarking@seattle.gov or (206) 727-8484.

☐ Obtain the following details about the building's use:

1. The primary use of the building. For example: multifamily, office, warehouse, etc.
2. The gross floor area of the building, not including parking area.
3. The floor area of parking that is metered with other building uses. For example: a garage with lights and ventilation that is connected to the "house" meter, which may also serve common areas in the building.
4. The floor area of any other uses of the building. For example: a multifamily building might have ground floor retail shop(s).
5. For buildings eligible for an ENERGY STAR score, other details like operating hours, number of workers, etc. are required for benchmarking. Use the **Property Use Details Worksheet for ENERGY STAR Eligible Buildings** in the Appendix of this guide.
6. Information about what energy utilities are used for **both** the common area and tenant spaces. For example, does the ground floor restaurant have gas service from PSE in addition to City Light electric? **You will need to conduct a meter audit and building walkthrough to obtain a comprehensive list of all utillity meters serving the building, as these are needed when confirming meters for utility automated data exchange. Buildings that are reporting incomplete energy consumption will be flagged as innacurate, and will not be considered compliant until complete energy consumption is verified and reported.**

Need help?

For free help, e-mail energybenchmarking@seattle.gov or phone (206) 727-8484 (M-F, 8-4).

Visit the website to learn about in-person help and free workshops.

☐ **Already benchmarking?** If you currently benchmark your building using Portfolio Manager, simply skip to Step 4 to confirm buildings' **Energy Use Intensity** and then complete steps 5 and 6.

Missing your letter?

Contact the Help Desk for a copy or to find your building's ID number.

Prefer to use an outside service provider?

Visit www.neec.net/benchmark for a list of benchmarking vendors.

Continue to Step 2 →

STEP 2 Set Up Property in Portfolio Manager

☐ **Create a new account** in Portfolio Manager at www.energystar.gov/portfoliomanager.

1. On the right side of the page, click the blue **Register now** button.
2. **DO NOT** use ANY special characters in your username (letters and numbers only).
3. **KEEP A RECORD** of the username and password — it is not possible to change usernames. *To recover a lost password click on the 'forgot password' link or submit an online request form.*
4. We recommend using one Portfolio Manager account per building, so buildings can be easily transferred to a new employee, manager or owner.

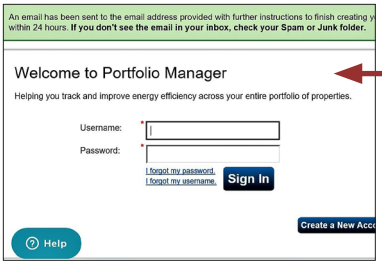
What if I don't use a computer?

1. *Call (206) 727-8484 and provide a mailing address.*
2. *Complete and return mailed forms and our staff will facilitate your computer process*

Tip *Watch Creating a Portfolio Manager Account and Entering Data training video for more detailed instructions.*

☐ Answer the basic questions about you and your organization.

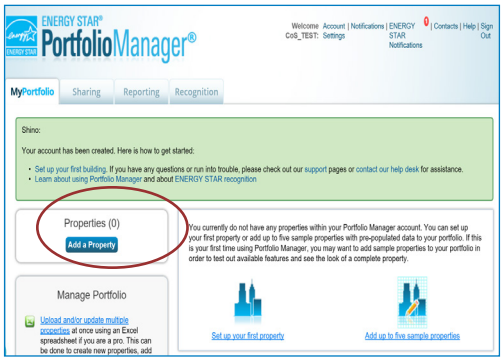
1. For **Reporting Units**, choose "Conventional EPA Units (e.g., kBtu/ft²)."
2. For "Can other people search for you and send a connection request?", choose **Yes**. After selecting Yes, click "**Create My Account**".

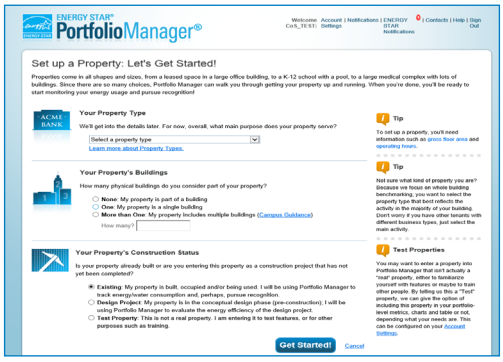


☐ After creating an account, you will get an activation email to verify your account. The link must be activated within 24 hours before it expires. Once verified, re-login with your new credentials, then click on **Add a Property**.

1. Select the primary property type.
2. Select the number of buildings. Most people will select, "One: My property is a single building." If the property is a campus (see right), please read **EPA's Guide:** How to Benchmark a Campus.
3. For Your Property's Construction Status, select Existing.

A campus *is a set of buildings on a shared energy meter or central heating plant (not including hospitals, senior care, or K-12 schools).*





How does Portfolio Manager define a Property? *Portfolio Manager calls buildings "properties" and in most cases one building = one property. In Portfolio Manager, "properties" mean a contiguous parcel, not all the properties that a person may own throughout a city.*

4. Click **Get Started!**

☐ **Enter Basic Property Information** including the building name, address, year built, occupancy and gross floor area (not including parking). Under the "Do any of these apply?" section.

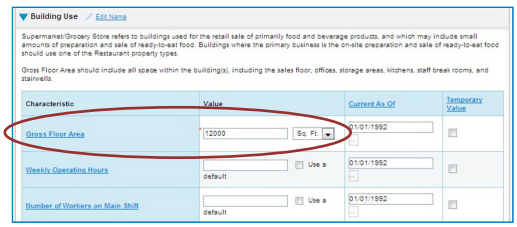
1. If parking IS served by an energy meter connected to the building it serves, SELECT "My property's energy consumption includes parking areas".
2. If parking served by an energy meter NOT connected to the building it serves (i.e. it is on a separate meter), DO NOT select "My property's energy consumption includes parking areas".
3. Check other options that apply.

☐ Click **Continue**.

☐ On the next page, enter details about the primary building use, and additional property uses, based on the boxes checked on the prior page.

☐ The specific use details required will differ based on the property type selected. Refer to the **Property Use Details Worksheet for ENERGY STAR Eligible Buildings** in the Appendix of this guide.

1. Hover the computer mouse over each property use characteristic for definitions.



Tip Space Uses should be summarized to reflect the total square footage of any given space type. All retail square footage should be added together, as well as office, restaurant, multifamily, etc.

2. Actual values for space details (i.e. operating hours, number of bedrooms, etc.) are required for reporting. **Do not** use "default values".
3. The **Gross Floor Area (GFA)** that you entered when setting up your property will automatically populate into the GFA section.

NOTE If your property has multiple uses, you may want to adjust this number based on the actual GFA for the primary type of use. (Example: The building's primary function is office and the total GFA of the whole building is 30,000 sf. It also has some retail stores totaling 10,000 sf.) When entering the attributes for the primary space type (office), change GFA to reflect JUST the office space: 20,000 sf. Next click "Add Another Type of Use" to enter the attributes and remaining square footage for the building's retail space.

*Tip See Appendix **Entering Building Details and Common Portfolio Manager Errors** for further instructions on how to enter building details, multiple space uses, and parking .*

Additional Uses?

☐ Add more space uses to your property by selecting an option in the drop down menu **Add Another Type of Use**, and then click "Add". This will open up a different list of attributes for that particular space type.

Continue to Step 3 →

STEP 3 Obtain Energy Meter Usage Data

Data Exchange

Seattle City Light (SCL), Puget Sound Energy (PSE), and Enwave Seattle (Steam) can upload whole building data to your Portfolio Manager account every month via Portfolio Manager data exchange (web services). NOTE: This service was formerly called Automated Benchmarking or ABS.

Utility Contact Information

Seattle City Light - See page 7

Email scl_portfolio_manager@seattle.gov
Phone (206) 684-7557
Website www.seattle.gov/light/accounts/energyusage

Puget Sound Energy - See page 11

Email mydata@pse.com
Phone (425) 424-6486
Website http://mydata.pse.com

Enwave Seattle (formerly Seattle Steam) - See page 16

Email pdlesk@utlitystudio.com
Phone 847-420-6432
Website www.enwaveseattle.com/energy-star-reporting.htm

Manual Meter Entry

If only few energy meters serve your building, or you want to track energy use closely by tenant or meter AND have access to all the bills, another option is to enter the monthly energy use by month into your Portfolio Manager account. Manual meter entry can be used for some or all of your utility services. For example, data exchange could be used for City Light electric, but Enwave could be manually entered.

Manual Meter Entry instructions are in the Appendix.

3A SEATTLE CITY LIGHT DATA EXCHANGE

Seattle City Light

Phone: (206) 684-7557
Email: scl_portfolio_manager@seattle.gov
Website: www.seattle.gov/light/accounts/energyusage

*Tip Watch the Obtaining Data Usage: Seattle City Light training video -or- see Appendix E **Submitting Seattle City Light Data Exchange Authorization** for more detailed instructions on how to complete and submit the **Automated Benchmarking Authorization** form .*

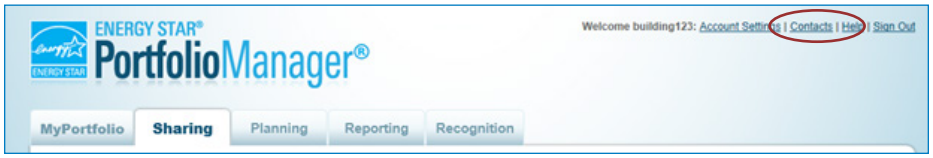
1. Fill Out & Submit Consumption Request Form

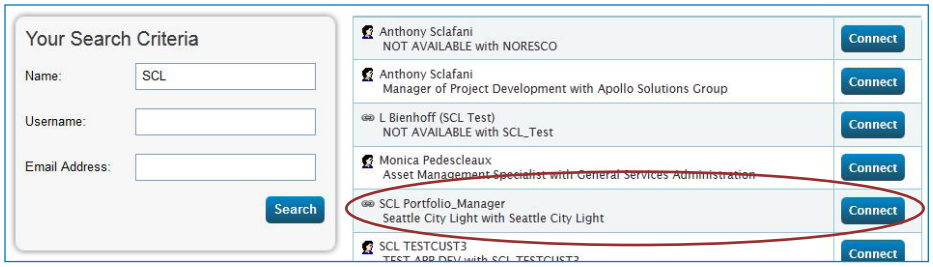
- ☐ Visit **www.seattle.gov/light/accounts/energyusage** to complete and send the **Portfolio Manager Automated Benchmarking Consumption Request** form and agree to the **Terms and Conditions.**
- ☐ Your Request form will be processed within four business days. Look in your email for the **Automated Benchmarking Authorization** form from SCL.

2. Authorization and Connecting to SCL

IMPORTANT: These screenshots supplement the instructions provided on SCL's **Automated Benchmarking Authorization** form, which you must have to proceed.

- ☐ Log in to Portfolio Manager with the **Authorized Portfolio Manager Username** listed on your **Seattle City Light Authorization form**.
- ☐ If you **have not previously added SCL** as a contact, you will need to add them:
  1. Click the **contacts** link in the upper right hand corner, then, leaving the search box empty, click the Search button.



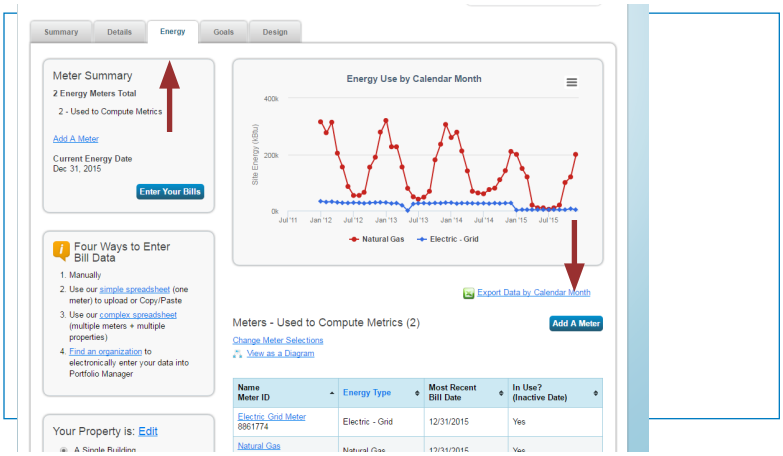


  2. Under **Your Search Criteria**, enter **SCL** as Name. Enter or click Search.
  3. From the list of contacts, locate **SCL Portfolio_Manager**.
  4. Click the **Connect** button to the right of the name.
  5. When prompted, enter your **Portfolio Manager Username in all uppercase letters,** check the Terms of Use and then **Send Connection Request** button.
  6. This connection request should be accepted in approximately 1 hour. **Please wait before proceeding.**

3. Connection Approval and Virtual Meter Setup

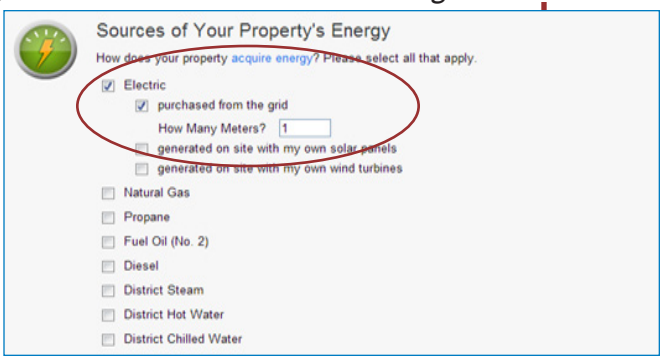
☐ In Portfolio Manager, on the **MyPortfolio** tab, under the **My Properties** section, click on the name of the building that has the meter you are setting up.

☐ Still on **MyPortfolio** tab, click the **Energy** tab, then click **Add A Meter**.



☐ In the **Get Started Setting Up Meters** section, answer the questions:

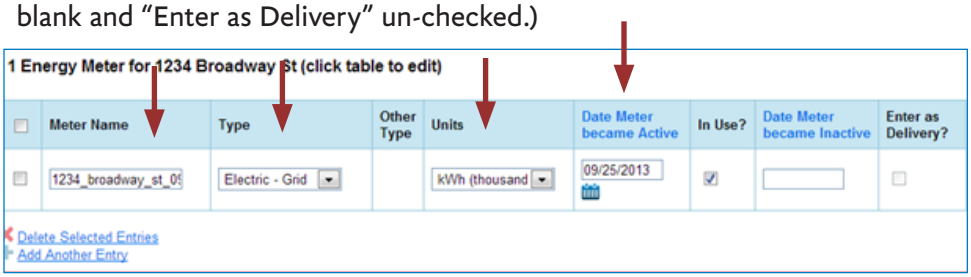
1. Under **Sources of Your Property's Energy** check **Electric** and **purchased from the grid.**
2. For **How Many Meters?** Enter **1**.
3. Scroll down below the Water Usage section and click **Get Started!**



☐ On the next page, in the **Meter Name** column, click on the words: **Electric Grid Meter**.

1. Replace the words: **Electric Grid Meter** with the **Virtual Meter Name** that SCL provided on the authorization form.
2. Under **Units**, select **kWh (thousand kilowatt hours)**.
3. Under **Date Meter Became Active**, type in: **01/01/2009.** (Leave "Inactive" date blank and "Enter as Delivery" un-checked.)

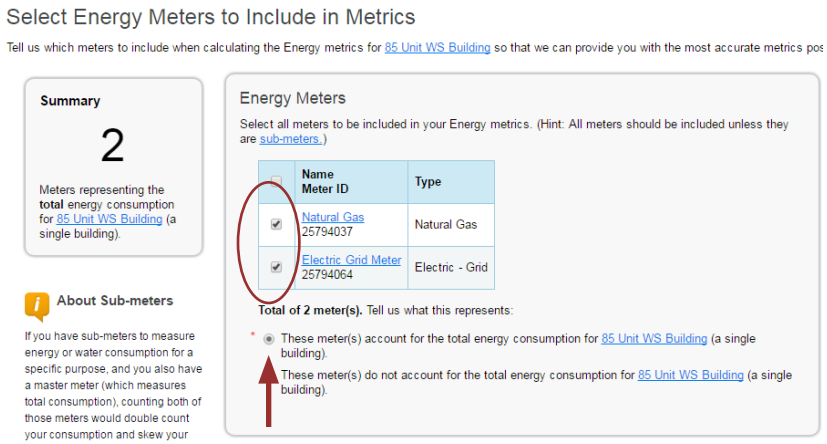
Tip: Copy the Virtual Meter name directly from the SCL authorization form and paste it to reduce typos.



4. Click **Create Meters**.
5. Click **Continue**.

☐ On **Select Energy Meters to Include in Metrics** page:

1. Check all of the meters.
2. Select: **These meter(s) account for the total energy consumption for this property**.
3. At the bottom of the screen, click the **Apply Selections** button.

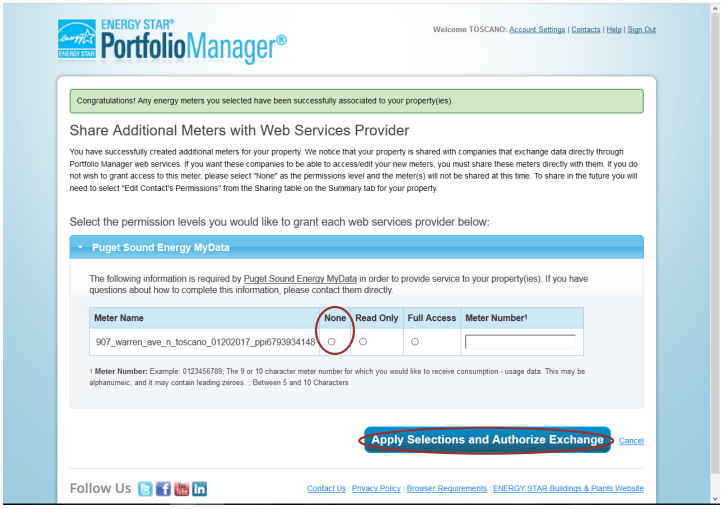


4. Select Permission Levels for Other Web Services Providers (if applicable)

If you are using other automated data services (such as Puget Sound Energy), then you will be given the option to allow other utilities to view your SCL meter data.

☐ On the **Share Additional Meters with Web Services Provider** page, select "None" on the **Puget Sound Energy MyData** tab.

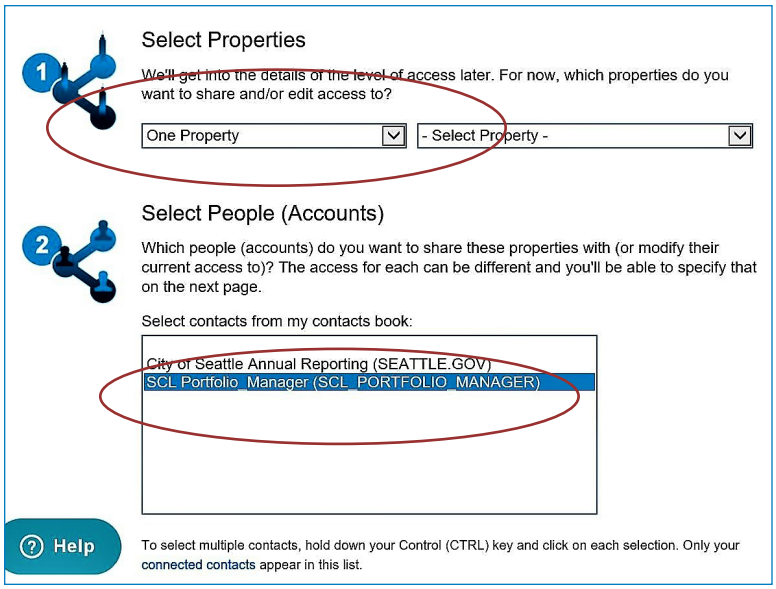
☐ Select **Apply Selections and Authorize Exchange**.



5. Share Property with Seattle City Light

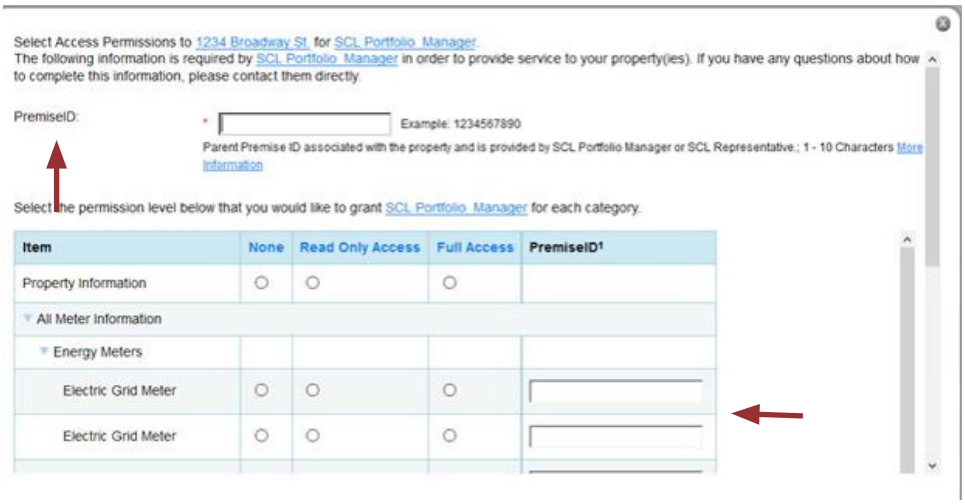
☐ Go to the **Sharing Tab** and click **Share (or Edit Access to) a Property**.

1. Select **One Property** and then choose the building to connect to SCL.
2. Select contact, **SCL Portfolio Manager**
3. Under **Choose Permissions,** select the second option: "Personalized Sharing & Exchange Data."
4. Click **Continue**.



☐ On the next screen, select the **Exchange Data** button, which will pop-up the Access Permissions window.

1. In the pop-up window, enter the **Premise ID number** found at the top of your **SCL Authorization Form.** You need to enter the Premise ID number in **TWO** places as shown below.



2. IMPORTANT: Set the Access Permissions exactly as follows:

   Property Information: **Read Only Access**
   SCL Virtual Meter Name: **Full Access**
   For any other meters listed: **None**
   Goals, Improvements: **None**
   Recognition: **None**

3. Scroll down. For **Share Forward**, select "No".
4. Scroll down the window and click **Apply Selections & Authorize Exchange.**

☐ This will open the Sharing window again. Click on the **Share Property(ies)** button to finish.

☐ You should see data in your Virtual Meter in about four hours.
Thereafter, SCL will update this meter monthly.

3B PUGET SOUND ENERGY "MYDATA"

Tip Watch the Obtaining Data Usage: Puget Sound Energy training video for more detailed instructions.

Phone: (425) 424-6486
Fax: (425) 462-3418
Email: mydata@pse.com
Website: https://www.pse.com/pages/your-property/my-data

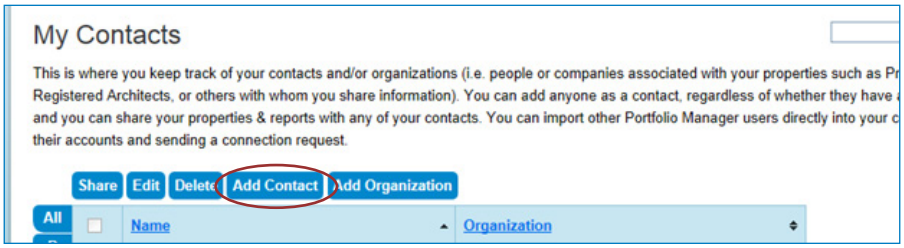
PSE CUSTOMERS: These instructions will show you how to enroll in PSE MyData to obtain your buildings natural gas usage history. MyData will also provide automated monthly uploads of gas usage thereafter once enrolled.

IMPORTANT:
*PSE requires **release forms** if you have four (4) or fewer tenants in your building that each receive PSE service. Each account holder must complete and sign the **PSE Customer Data Release Form**. We recommend downloading the form now, as it may take time to contact all tenants.*

1. Add PSE as a Contact

☐ If you **have not previously added PSE** as a contact, you will need to add them:

1. Click the **Contacts** link in the upper right hand corner.
2. Click on **Add Contact.**



3. Enter **ESIOPERATOR** as the Username. Click **Search**.
4. From the list choose **Puget Sound Energy MyData**. Click the **Connect** button.
5. Review **Terms of Use,** 'check the box' and click **Send Connection Request**.
6. This connection request should be accepted in less than 1 hour.

2. Share Your Building with PSE

☐ Go to the **Sharing Tab** and click on **Share (or Edit Access to a Property)**.

☐ Select the properties to share with **Puget Sound Energy MyData**.

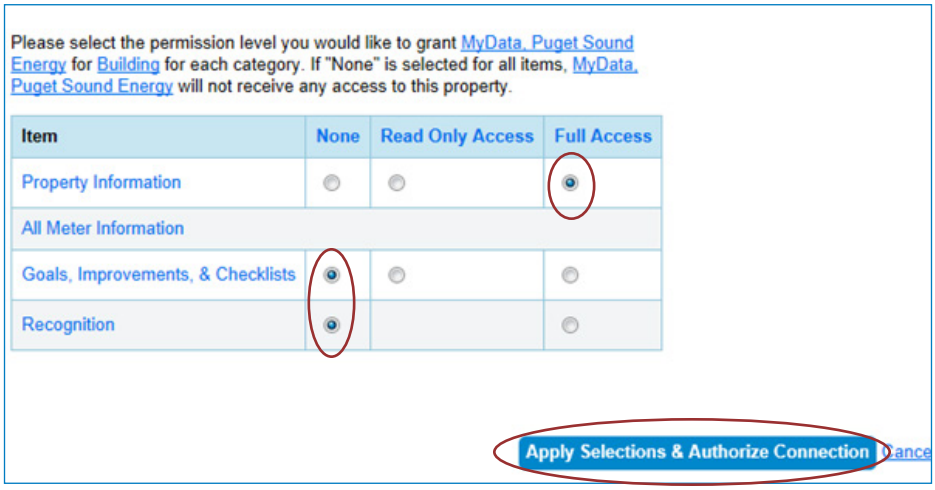
☐ Under **Choose Permissions**, select the second option: "Personalized Sharing & Exchange Data." Click **Continue**.

☐ On the next screen, select the Exchange Data button, which will pop-up the Access Permissions window.

☐ **IMPORTANT:** Select the Access Permissions as follows:

1. Property Information: **Full Access** (PSE requires Full Access so that they can create a new meter in your account.)
2. All Meter Information: Leave as **None**. (Choose None for access, even if old PSE meters are listed. Leave any meters numbers as is.)
3. Goals, Improvements: Leave as **None**
4. Recognition: Leave as **None**

CAUTION! Any non-PSE meters, such as City Light electric must be listed as None for access.

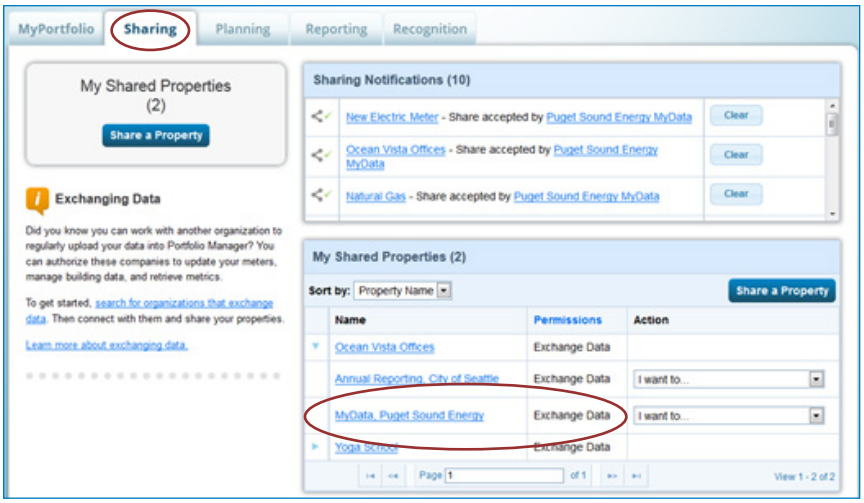


☐ Scroll down. For **Share Forward,** select "No".

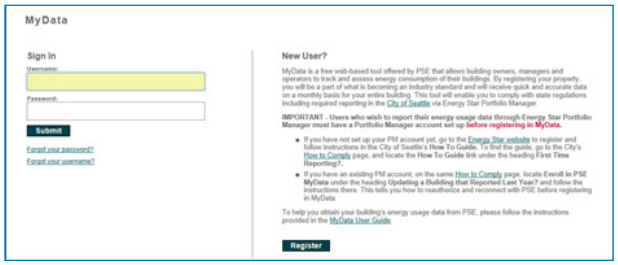
☐ Click **Apply Selections & Authorize Connection**.

☐ This will open the **Sharing** window again. Click on the **Share Property(ies)** button to complete the sharing process.

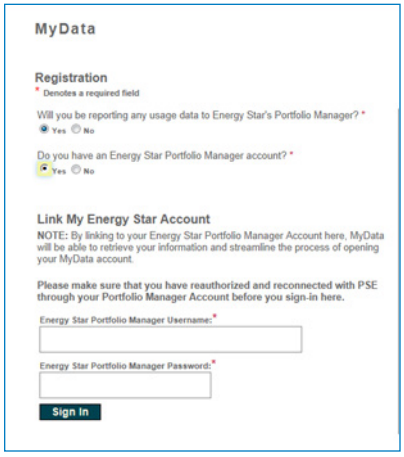
IMPORTANT: **Your sharing request should be accepted by PSE in approximately 1 hour. Do not start the next step until MyData, Puget Sound Energy is listed as having Exchange Data permisions in Portfolio Manager, as shown below.**



3. Create a New Account in PSE's MyData

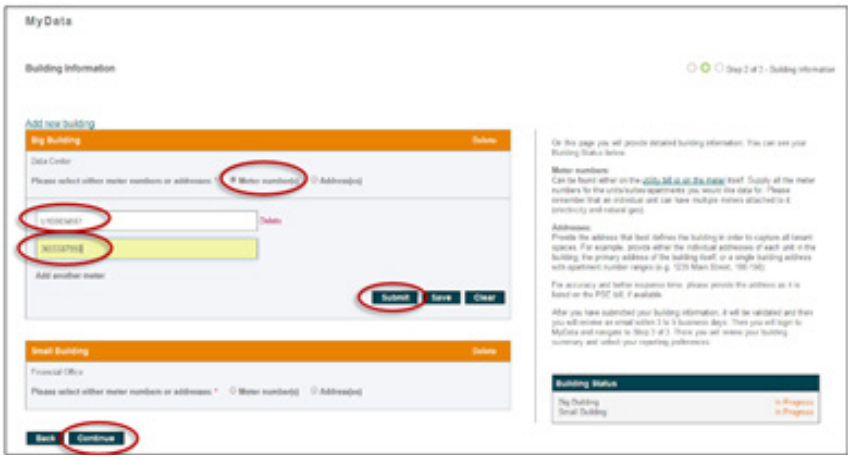


- ☐ Go to **mydata.pse.com**
- ☐ Read the new user information and click the **Register** button.
- ☐ Answer **Yes** to both questions:
  1. Will you be reporting any usage data to EnergyStar's Portfolio Manager?
  2. Do you have an EnergyStar Portfolio Manager account?



- ☐ Sign in with your **existing Portfolio Manager Username and Password**.
  1. If you connected to PSE and shared properties and waited for PSE to accept the shares, your account contact information should automatically populate on the Registration page. PSE will email you using this information, so make corrections. **If it does not populate, stop and contact PSE at 425-424-6486 or email mydata@pse.com**.
- ☐ After completing MyData registration, **check your email** for a message from MyData to activate your account. Click the link in the email to go back to MyData.
- ☐ Now in **MyData**, click the Next button.
  1. The properties shared from Portfolio Manager should all be listed on the Building Information page. **If your properties are not listed, stop and contact PSE at 425-424-6486 or email mydata@pse.com. Do not click "Add a New Building."**

IMPORTANT:
*If you are Multifamily property be sure to search by **all** addresses associated with the building. Buildings that do not report complete natural gas consumption will be required to correct innacurate accounts.*

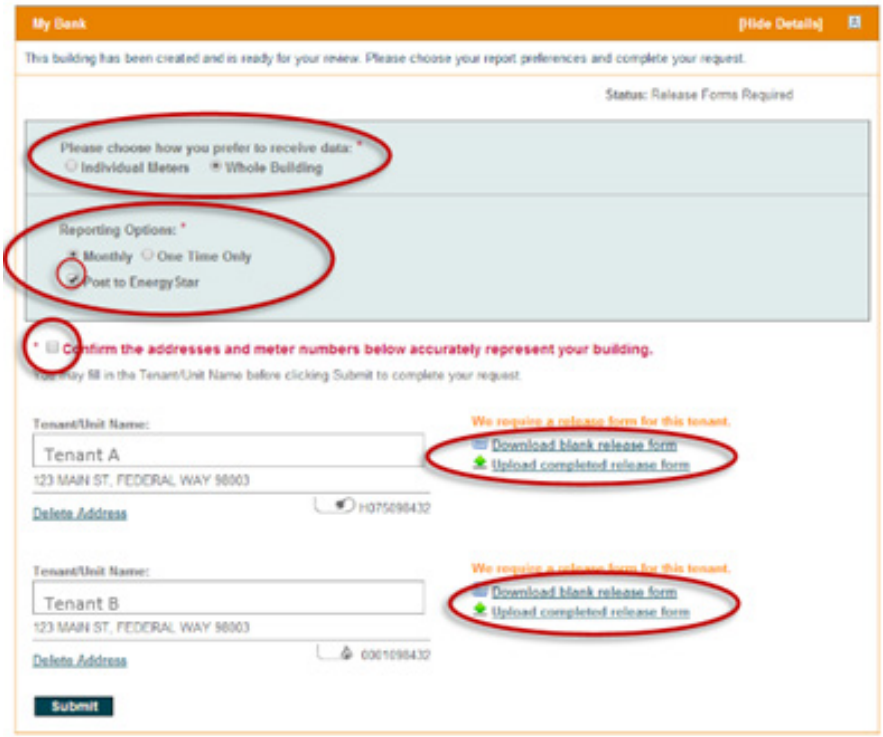


- ☐ On the **Building Information** page, click **Show Details** (in the orange bar) to see the details of each building.
  1. Select Meter numbers and enter all PSE meter numbers that are part of your property. This option works well
  2. Alternatively, you may select Address(es) and enter the addresses or range of addresses for the building.
  3. If you need to go get information, you can click Save and come back later to finish.

- ☐ When done entering the information, click **Submit**.
  1. **MyData should email you** in up to 3-4 days to invite you back to review the building information and select report preferences.

- ☐ After you are emailed that the building is ready, go back to **MyData** and click on **Show Details** (in the orange bar) to see the details of each building.
  1. In the blue box, select **Whole Building**, **Monthly** and **Post to EnergyStar**. (These will likely be the default selections).
  2. Confirm addresses and meter numbers. If anything is incorrect or missing, contact PSE.

- ☐ If asked for, download & complete any required **release forms** and upload them. *PSE requires release forms for buildings with fewer than 5 tenants. For questions about this requirement, please contact PSE.*



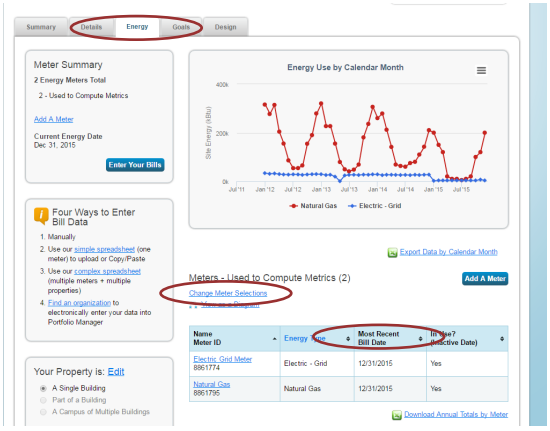
- ☐ When complete, click **Submit**. PSE will prepare your usage report and email you when it is complete. Please allow up to three days.

- ☐ If you do not get an email, contact PSE's User Support at 425-424-6486 or email mydata@pse.com.

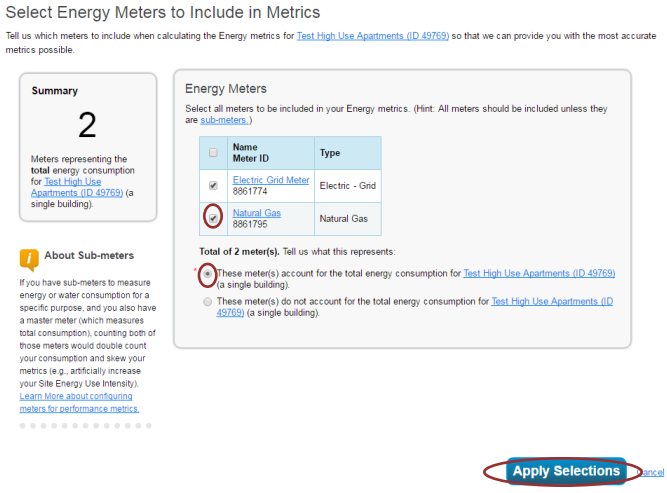
4. Configure New PSE Meter in Portfolio Manager

After MyData is set up, PSE should add a new gas meter to your Portfolio Manager account called **MyData Usage - GAS** meter. This step shows how to log into your Portfolio Manager account to make sure the new PSE MyData Usage - GAS meter is listed and configure it to obtain the building's required EUI.

- ☐ Log back into Portfolio Manager and click on the property to open.
- ☐ On the **Energy** tab, look for a meter named **PSE MyData Usage - GAS**.
- ☐ Check that the **Most Recent Bill Date** lists a date within the last two months.



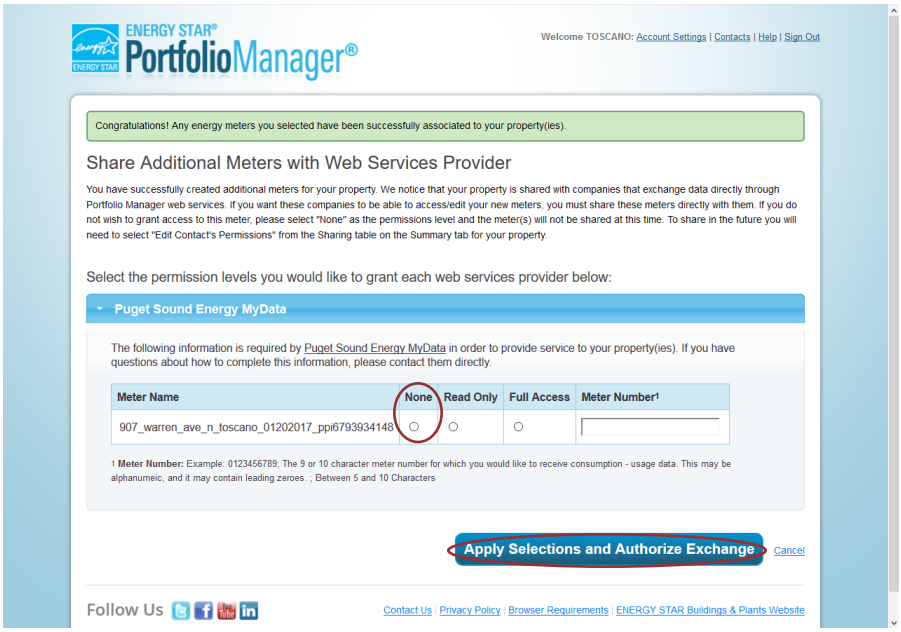
- ☐ On that same page, click **Change Meter Selections**.
  1. Under **Energy Meters**, add a check mark to include **PSE MyData Usage-GAS** in the energy metrics. IMPORTANT: A check should also be next to the electric and any other energy meters *currently serving* the building. If there are other previously entered PSE meters that are now included in the new PSE MyData Meter, uncheck them. You may also consider deleting these "old" PSE meters.
  2. Select "These meter(s) account for the total energy consumption of this property."
  3. Click **Apply Selections**.



5. Select Permission Levels for Other Web Services Providers (if applicable)

If you are using other automated data services (such as Seattle City Light), then you will be given the option to allow other utilities to view your PSE meter data.

- ☐ On the **Share Additional Meters with Web Services Provider** page, select "None" on the **Seattle City Light Data Exchange** tab.
- ☐ Select **Apply Selections and Authorize Exchange**.



3C ENWAVE SEATTLE (SEATTLE STEAM) DATA EXCHANGE

Phone (206) 658-2025
Website www.enwaveseattle.com/energy-star-reporting.htm
Email mlowe@EnwaveSeattle.com

ENWAVE SEATTLE CUSTOMERS: You will need to complete a few simple steps to begin automated Portfolio Manager reporting with Enwave Seattle. Detailed instructions can be found in your online Enwave Seattle customer portal.

- ☐ Log in to your online Enwave Seattle/UtilityStudio account and complete the Enwave Seattle Authorization Agreement, in the "ENERGY STAR Reporting" link. If you do not know your username and password for your Enwave Seattle account, or if you have any questions, please contact Marco Lowe at Enwave Seattle, at 206-623-6366, or mlowe@EnwaveSeattle.com.
- ☐ In ENERGY STAR Portfolio Manager (PM) create your account and complete the setup for your facility. In this step, you will create the steam meters that represent all of your steam usage in your facility. If you are a multi-site account, you will create a facility and meter setup for each building in your account. If you already have a PM account, please confirm your steam meter setup, for each facility.
- ☐ When defining your steam meters in PM, create meters for EACH billing meter listed on your Enwave Seattle invoice, including any meters listed as Non-Metered. Define each meter, using the Energy Type = District Steam and the Units = kLbs.
- ☐ In your PM account, add a CONTACT to establish a connection with Enwave Seattle Energy Star Reporting Services.
- ☐ Request Data Exchange Services by "Sharing" your property and setting permissions for each steam meter to "Full Access".
- ☐ You will receive confirmation of your request from Portfolio Manager and Enwave Seattle. Reporting will begin for your facility by the 15th day of the next billing month. Enwave Seattle will load the most recent 2 years of usage data for each meter, and will continue to update the steam meter usage data each month.

Continue to Step 4 →

STEP 4 Confirm Energy Use Intensity (EUI)

A Site EUI ending December 31 for the required year must be available to report to the City. The EUI indicates the energy use per square foot per year (kBtu/sq. ft.) and can be used to compare the building's energy use to other similar building types.

Accurate Reporting: *Buildings with unusually low or high (outlier) EUIs or other errors will be flagged for accuracy and may be issued a warning letter to make corrections.*

- ❑ Under the property **Summary** tab, verify that the building has a **Site EUI** and **ENERGY STAR** score (if available) for Current (Dec 20xx) reporting year. *Contact Help Desk if missing.*
- ❑ The **ENERGY STAR score** must also be listed (if eligible) for your property type, such as Office, Multifamily (20+ units), Retail, Warehouse. See Appendix A.

Metrics Summary — Change Time Period

Metric	Dec 2014	Current (Dec 2015)	Change
ENERGY STAR score (1-100)	76	76	N/A
Source EUI (kBtu/ft²)	95.3	100.6	5.3(5.6%)
Site EUI (kBtu/ft²)	30.3	32.0	1.7(5.6%)
Energy Cost ($)	17,535.24	17,628.00	92.76(0.5%)
Total GHG Emissions (Metric Tons CO2e)	113.7	120.0	6.3(5.5%)

PRINT STATEMENT OF ENERGY PERFORMANCE

- ☐ Go to the **Reporting** tab and choose **Statement of Energy Performance**.
- ☐ Select the property name.
- ☐ Select **Timeframe: Single Year** ending **Dec of the required year.**
- ☐ Select contacts (optional).
- ☐ Click **Generate & Download Report(s)** and a PDF of the report should appear. (If your web browser has pop-up blockers, disable them if the report does not appear.)
- ☐ Confirm that the **Statement of Energy Performance** lists a **Site EUI** for **Year Ending: December 31, [required year]**. (See next page for an example.)
- ☐ **Save** and print a copy for your records.

NOTE If the building *does not* have 12 months of utility data ending in that December, Portfolio Manager will generate an error message like this:

3 Select Timeframe for Report(s)

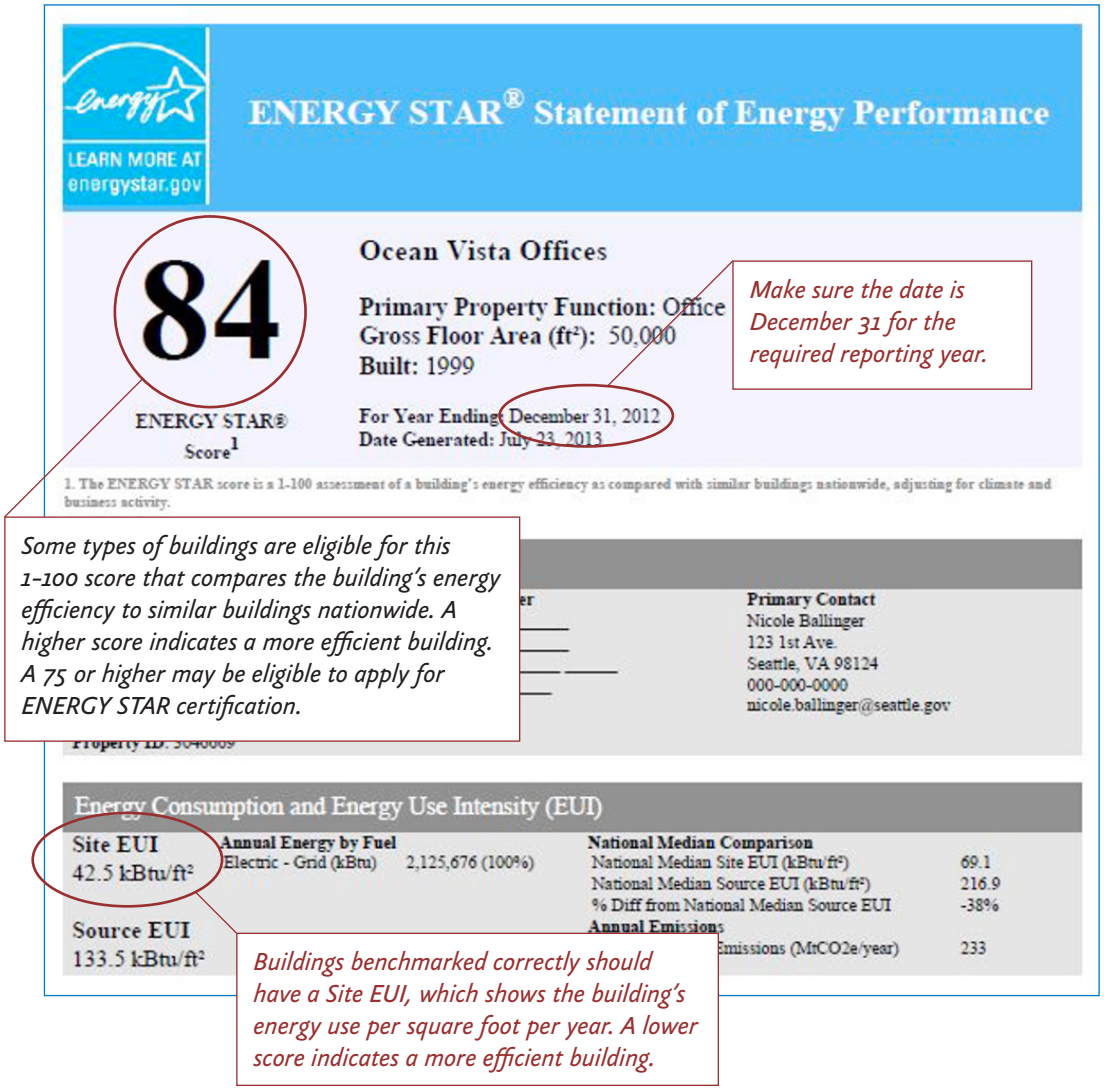
You have selected a year ending date that does not have 12 months of data. Please select another date.

Timeframe: * Single Year Ending Dec 2012

If you get an error, and are sure that all the energy meters have a full year of data ending December 31st, contact the Help Desk for assistance.

About the Statement Energy Performance

The **Statement of Energy Performance** is a quick reference for sharing your building's energy use as indicated by the **Site EUI**—required by Seattle law of building owners if requested by current and future tenants, buyers or lenders. Although not required by Seattle, the document is also used to show ENERGY STAR-certified buildings when verified by a professional engineer.



Make sure the date is December 31 for the required reporting year.

Some types of buildings are eligible for this 1-100 score that compares the building's energy efficiency to similar buildings nationwide. A higher score indicates a more efficient building. A 75 or higher may be eligible to apply for ENERGY STAR certification.

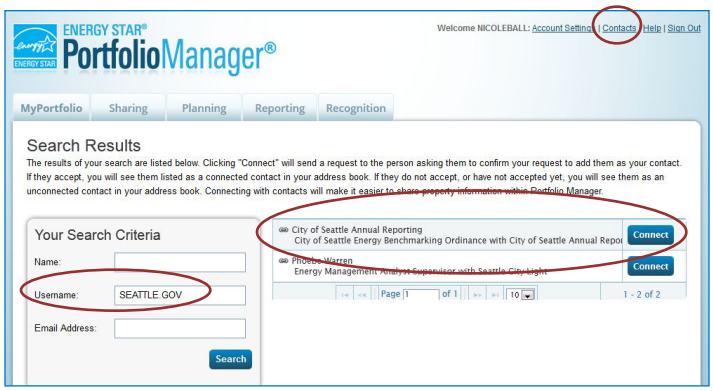
Buildings benchmarked correctly should have a Site EUI, which shows the building's energy use per square foot per year. A lower score indicates a more efficient building.

Continue to Step 5 →

STEP 5 Add the City of Seattle as a Contact

__Tip__ Watch the [Confirm Energy Use Intensity (EUI) and Report Your Data]() training video for more detailed instructions to complete the benchmarking process and submit your report to the City.

- ☐ Click on the **Contacts** link in the upper right hand corner of the screen.
- ☐ Click **Add a Contact** to search for users that you can connect with.
- ☐ In the **Username** field, type in "SEATTLE.GOV" and click search.
- ☐ From the **Search Results** page, select **City of Seattle Annual Reporting** and click connect.

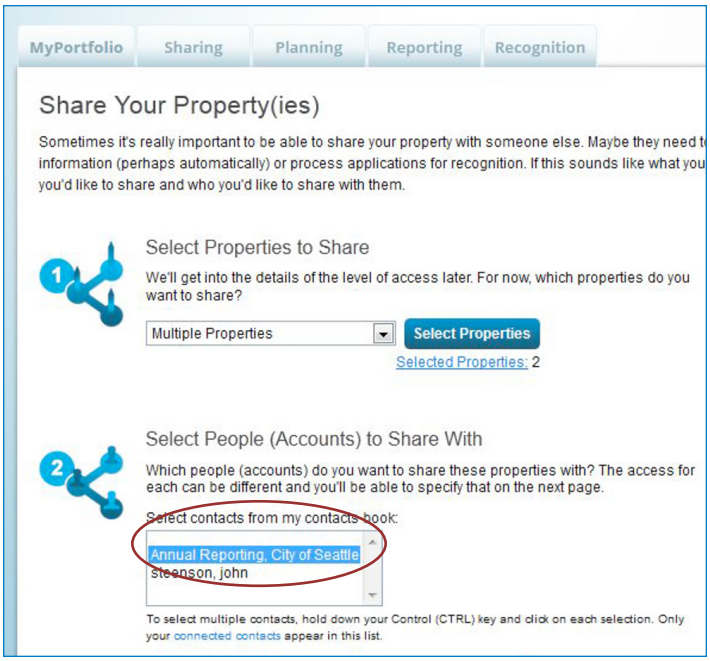


- ☐ Fill in your Contact Name, Contact Email Address and Contact Phone Number.
- ☐ Agree to the Terms of Use and select **Send Connection Request**.
- ☐ **IMPORTANT** The City of Seattle processes new contact requests **hourly**. You will be sent a confirmation email when the City of Seattle accepts your request.

Once your request is accepted, continue to Step 6 →

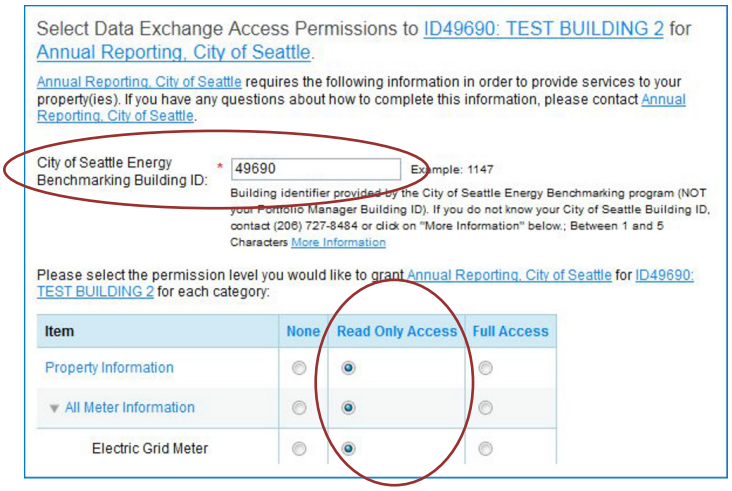
STEP 6 Share Building with the City of Seattle

- ☐ After you are connected to City of Seattle Annual Reporting, **share your property** and associated meters with the City of Seattle.
- ☐ Go to the **Sharing Tab** and click **Share (or Edit Access to) a Property**.
- ☐ Select the properties to share with **City of Seattle Annual Reporting**.
- ☐ Under **Choose Permissions**, select the second option: "Personalized Sharing & Exchange Data." Click **Continue**.
- ☐ On the next screen, choose **Exchange Data** for each property.



☐ On the Access Permissions page, enter the **City of Seattle Building ID** (this number is 1-5 digits and is not the Portfolio Manager Building ID). Find the number of the notification or warning letter. Contact the help desk if missing.

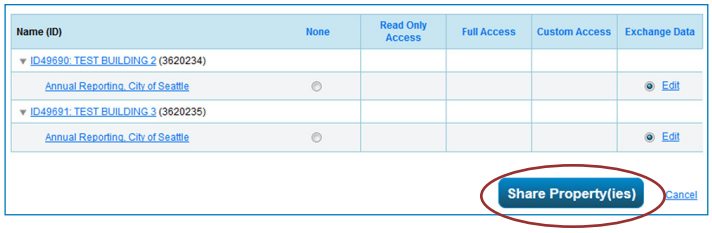
☐ **IMPORTANT: Select the Access Permissions as follows:**
Property Information: **Read Only**
All Meter Information: **Read Only**
Goals, Improvements: **Read Only**
Recognition: **Leave as None**



(You may need to scroll down to view all the information.)

☐ Scroll down. For **Share Forward,** select "No".

NOTE If you have more than one building do the above steps for each building.



☐ Click **Apply Selections & Authorize Exchange**.

☐ When complete (for all buildings you are sharing), click **Share Property(ies)** again.

☐ **Tomorrow**, look for a confirmation email from the City for each building shared.

NOTE If you do not get an email tomorrow, please check your "spam" or "junk" folder for it. If missing, contact the Help Desk.

IMPORTANT *It is the responsibility of the building owner on record to confirm accurate annual compliance. Reports with unusually low or high (outlier) EUIs or other errors will be flagged for accuracy and required to make corrections.*

Appendix A

Property Use Details Worksheet for ENERGY STAR Eligible Buildings

The property types on this worksheet are eligible to receive a 1 - 100 ***ENERGY STAR*** *score, which is used to compare the property to similar properties nationwide and locally. If your building type is listed below and can receive a rating,* ***the use details for it below are required for Seattle's law*** *and when applying for ENERGY STAR certification.*

Please Note:

- Some buildings have multiple uses (e.g. office, data center, and parking). Complete the fields below for each major use in the building.
- Actual values for space details (i.e. operating hours, number of bedrooms, etc.) are required for reporting. "Default values" can only be used temporarily.
- If your building type is not listed below, it will receive an **Energy Use Intensity** (EUI) score, which is a measure of the energy use per square foot. These buildings are only required to list gross floor area.

Tip: For buildings with multiple tenants with the same use (i.e. several offices), enter the uses separately *only* when the total weekly operating hours among tenants differs by more than 10 hours.

Bank Branch

_____ Gross Floor Area
_____ Weekly Operating Hours
_____ Number of Computers
_____ Number of Workers on Main Shift
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Data Center

_____ Gross Floor Area
_____ IT Energy Configuration
_____ UPS System Redundancy
_____ Cooling Equipment Redundancy

Financial Office

_____ Gross Floor Area
_____ Weekly Operating Hours
_____ Number of Computers
_____ Number of Workers on Main Shift
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Hotel

_____ Gross Floor Area
_____ Hours Per Day Guests On-Site
_____ Number of Workers on Main Shift
_____ Number of Rooms
_____ Number of Guest Meals Served Per Year
_____ Cooking Facilities
_____ Number of Computers
_____ Number of Commercial Refrigeration/Freezer Units
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled
_____ Type of Laundry Facility
_____ Amount of Laundry Processed On-Site Annually
_____ Full Service Spa Floor Area

Courthouse

_____ Gross Floor Area
_____ Weekly Operating Hours
_____ Number of Computers
_____ Number of Workers on Main Shift
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Distribution Center

_____ Gross Floor Area
_____ Weekly Operating Hours
_____ Number of Workers on Main Shift
_____ Number of Walk-in Refrigeration/Freezer Units
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Hospital (General Medical & Surgical)

_____ Gross Floor Area
_____ Laboratory
_____ Number of Full Time Equivalent (FTE) Workers
_____ Maximum Number of Floors
_____ Number of Staffed Beds
_____ Number of MRI Machines
_____ On-Site Laundry Facility
_____ Tertiary Care
_____ Owned By

K-12 School

_____ Gross Floor Area
_____ Gymnasium Floor Area
_____ High School
_____ Number of Workers on Main Shift
_____ Student Seating Capacity
_____ Months in Use
_____ Weekend Operation
_____ Cooking Facilities
_____ Number of Walk-in Refrigeration/Freezer Units
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled
_____ School District Name

Medical Office

_____ Gross Floor Area
_____ Surgery Center Floor Area
_____ Weekly Operating Hours
_____ Number of Workers on Main Shift
_____ Number of Surgical Operating Beds
_____ Number of MRI Machines
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Multifamily

_____ Gross Floor Area
_____ Total Number of Residential Living Units (RLUs)
_____ *Number of RLUs in a Low-rise Setting (1-4 stories)*
_____ *Number of RLUs in a Mid-rise Setting (5-9 stories)*
_____ *Number of RLUs in a High-rise Setting (10 + stories)*
_____ Number of Bedrooms
_____ Resident Population Type (None, Student, Military, Senior/Independent, Special, Other)
_____ Government Subsidized Housing (Y or N)
_____ Number of Laundry Hookups in All Units
_____ Number of Laundry Hookups in Common Area(s)
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Office

_____ Gross Floor Area
_____ Weekly Operating Hours
_____ Number of Computers
_____ Number of Workers on Main Shift
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Senior Care Community

_____ Gross Floor Area
_____ Maximum Resident Capacity
_____ Average Number of Residents
_____ Number of Residential Living Units
_____ Number of Workers on Main Shift
_____ Number of Computers
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Supermarket/Grocery Store

_____ Gross Floor Area
_____ Weekly Operating Hours
_____ Number of Workers on Main Shift
_____ Number of Computers
_____ Number of Cash Registers
_____ Cooking Facilities
_____ No. of Open or Closed Refrigeration/Freezer Units
_____ Number of Walk-in Refrigeration/Freezer Units
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Non-Refrigerated Warehouse

_____ Gross Floor Area
_____ Weekly Operating Hours
_____ Number of Workers on Main Shift
_____ Number of Walk-in Refrigeration/Freezer Units
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Refrigerated Warehouse

_____ Gross Floor Area
_____ Weekly Operating Hours
_____ Number of Workers on Main Shift

Residence Hall/Dormitory

_____ Gross Floor Area
_____ Computer Lab (Y/N)
_____ Dining Hall (Y/N)
_____ Number of Rooms
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Retail Store

_____ Gross Floor Area
_____ Single Store
_____ Exterior Entrance to the Public
_____ Weekly Operating Hours
_____ Number of Workers on Main Shift
_____ Number of Computers
_____ Number of Cash Registers
_____ No. of Open or Closed Refrigeration/Freezer Units
_____ Number of Walk-in Refrigeration/Freezer Units
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Worship Facility

_____ Gross Floor Area
_____ Weekly Operating Hours
_____ Number of Weekdays Open
_____ Seating Capacity
_____ Number of Computers
_____ Cooking Facilities
_____ Number of Commercial Refrigeration/Freezer Units

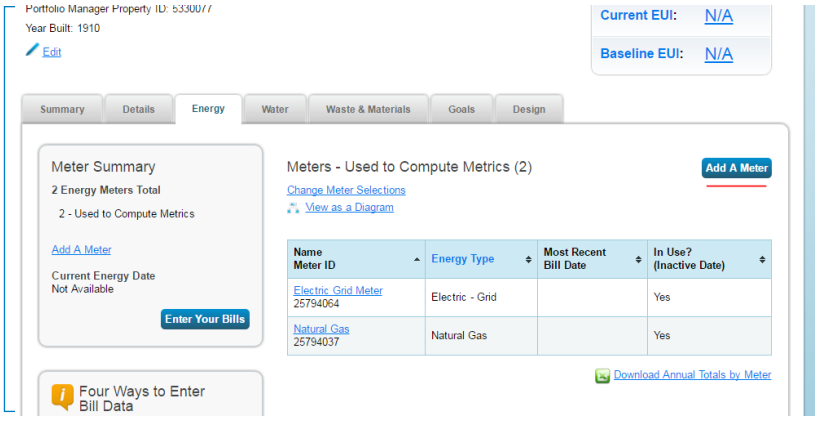
Wholesale Club/Supercenter

_____ Gross Floor Area
_____ Exterior Entrance to the Public
_____ Weekly Operating Hours
_____ Number of Workers on Main Shift
_____ Number of Computers
_____ Number of Cash Registers
_____ No. of Open or Closed Refrigeration/Freezer Units
_____ Number of Walk-in Refrigeration/Freezer Units
_____ Percent That Can Be Heated
_____ Percent That Can Be Cooled

Appendix B
Entering Utility Data Manually into Portfolio Manager

If you only have a few meters serving your building and prefer to hand enter the data, this option may work. We don't recommend it for multifamily or commercial with many tenants, as you will need get permission from all tenants to collect their bills.

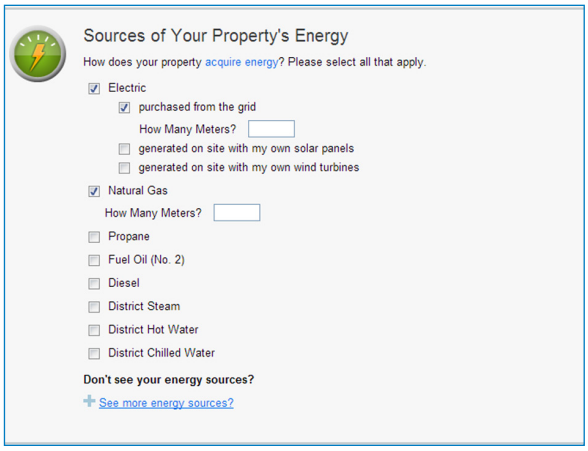
☐ Log in to your **Portfolio Manager** account and click on your property.



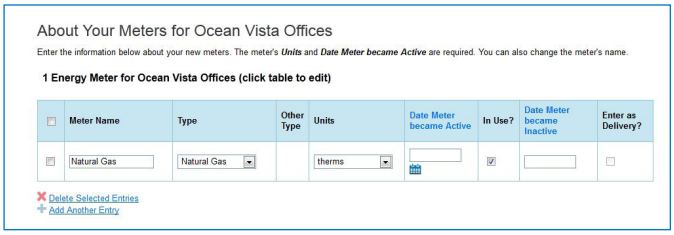
1. Add Energy Meters

☐ In your Property Profile page, click on the **Energy** tab and select **Add A Meter**.

☐ Select the **types of fuel** in your facility. For each type, enter the number of meters for that type. Click **Get Started**.



- ☐ On the **About Your Meters** section, click in the table to enter meter details.



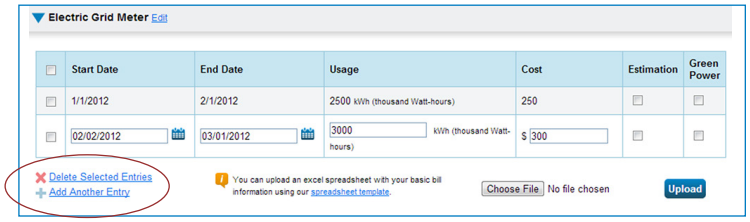
- ☐ Select the **correct unit** for the fuel type:
  1. Seattle City Light Electric = kWh
  2. Puget Sound Energy Natural Gas = Therms
  3. Seattle Steam = kLbs

- ☐ **Enter the Date Meter Became Active**. This is the date that the first bill was issued for the meter. (Note: if you are unsure of the first bill date, use your best guess).

- ☐ Select **In Use** if the meter is currently in use.
  - ☐ Leave the **Date Meter Became Inactive** empty since meter is currently in use.
  - ☐ Only select **Enter as Delivery** if the energy source is delivered to you, such as fuel oil or propane from a truck, as opposed to metered usage.

- ☐ If you need to add another **meter**, select **Add Another Entry**.

- ☐ When done entering meters, click **Continue**.



2. Enter Energy Usage

- ☐ On the next page, click in the table to **enter the bill dates and usage** for each month (cost is optional). Click **Add Another Entry** to add more months.

- ☐ Once you have entered at least 12 consecutive months of data for the year required, click **Finish Meter Set Up**.

- ☐ On the next page, select the meter(s) to be included in the energy metrics.

- ☐ Then select "These meter(s) account for the total energy consumption for this property" and click **Apply Selections**.

- ☐ You will be taken back to the **Property Profile** page.

- ☐ **Continue with Steps 4-6** to finish benchmarking and report to the City of Seattle.

Appendix C
Resources

City of Seattle Energy Benchmarking Help Desk
energybenchmarking@seattle.gov
(206) 727-8484

ENERGY STAR Portfolio Manager Login
www.energystar.gov/portfoliomanager

Seattle Office of Sustainability and Environment (OSE) Energy Benchmarking website
www.seattle.gov/EnergyBenchmarking

Utility Contact Information

Seattle City Light

Email scl_portfolio_manager@seattle.gov
Phone (206) 684-7557
Website www.seattle.gov/light/accounts/energyusage

Puget Sound Energy

Email mydata@pse.com
Phone (425) 424-6486
Website http://pse.com/accountsandservices/YourProperty/Pages/Automated-Benchmarking.aspx

Enwave Seattle

Email pdlesk@utlitystudio.com
Phone 847-420-6432 or (206) 623-6366
Website www.enwaveseattle.com/energy-star-reporting.htm

Appendix D

Entering Building Details and Common Portfolio Manager Errors

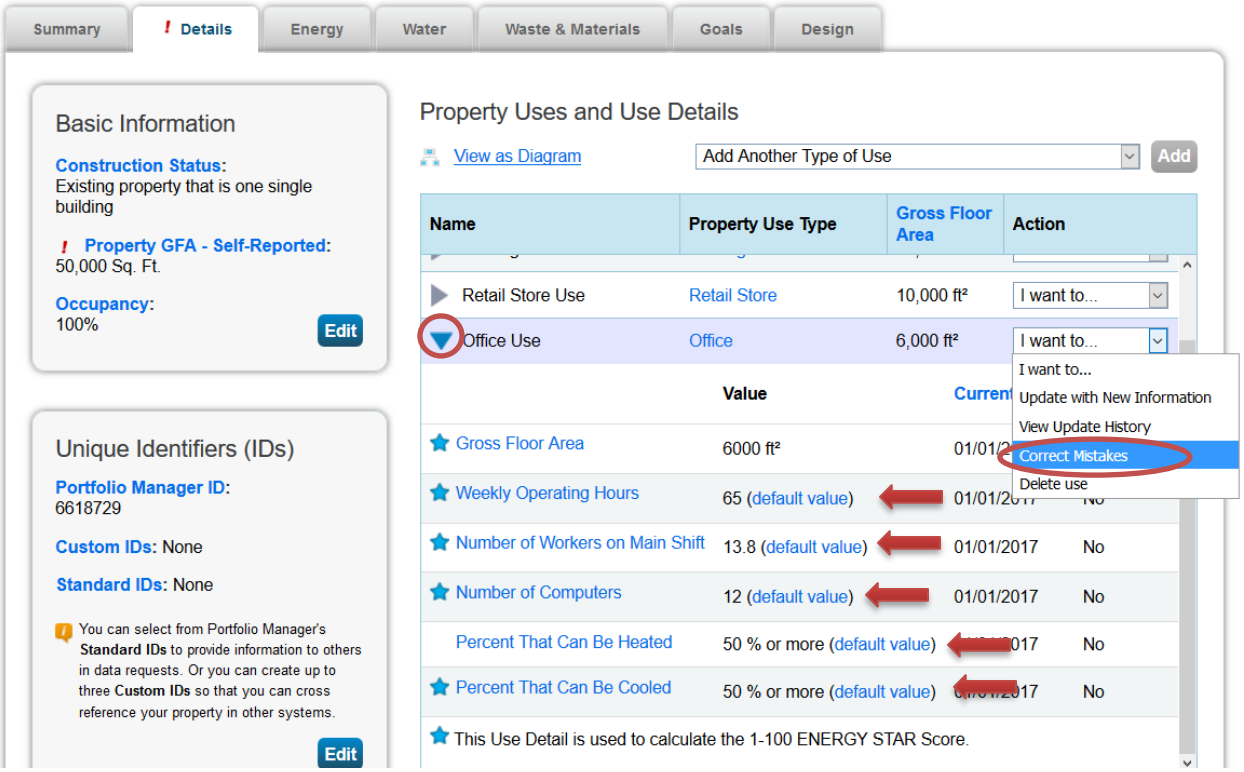
Default Values

Once new property types are added under the Details tab, you are asked to enter their use details. Portfolio Manager will give an option for you to check the "**Use a default**" value box as shown below. Use of these default values are flagged as errors by the City of Seattle and is **not allowed**. If your property has even a single default value box checked, it will be considered non compliant. Please enter actual values when you report your data to the City of Seattle to meet all compliance requirements. And DO NOT change your "Current As Of" Dates or check the Temporary Value boxes to the right. These will also be flagged as errors.

Name: * Office Use

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	* 6,000 Sq. Ft.	1/1/2017	☐
Weekly Operating Hours	☐ Use a default	1/1/2017	☐
Number of Workers on Main Shift	☐ Use a default	1/1/2017	☐
Number of Computers	☐ Use a default	1/1/2017	☐
Percent That Can Be Heated	☐ Use a default	1/1/2017	☐
Percent That Can Be Cooled	☐ Use a default	1/1/2017	☐

If you have accidentally checked these "Use a default" value boxes, please correct all values to actual values. To make the correction, go to your property's Details tab. Under Property Uses and Use Details section, select "I want to...Correct Mistakes" from the Action column to the far right for all use types that are using default values. To check if specific use types are using default values, you can click on the triangle icon to the left and expand your view for a snap shot as shown below.



Once you have selected "I want to...Correct Mistakes" option from the drop down under the Action column, next page will open up for you to make these corrections. Make sure to **uncheck** every single "Use a default" value boxes circled below in red.

History Log for Office Use

Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (campus), you need to update these Property Use Details in BOTH the parent and child properties.

Gross Floor Area

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	6,000 Sq. Ft.	☐	City of Seattle	12/20/2018

Delete Selected Entries

Weekly Operating Hours

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	65 ☑ Use a default	☐	City of Seattle	12/20/2018

Delete Selected Entries

Number of Workers on Main Shift

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	13.8 ☑ Use a default	☐	City of Seattle	12/20/2018

Delete Selected Entries

Number of Computers

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	12 ☑ Use a default	☐	City of Seattle	12/20/2018

Delete Selected Entries

Percent That Can Be Heated

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	50 % or more ☑ Use a default	☐	City of Seattle	12/20/2018

Delete Selected Entries

Percent That Can Be Cooled

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	50 % or more ☑ Use a default	☐	City of Seattle	12/20/2018

Once default value boxes are unchecked, replace these values with actual values. If you do not have the exact value, enter in your best estimate. Save all changes.

History Log for Office Use

Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (campus), you need to update these Property Use Details in BOTH the parent and child properties.

Gross Floor Area

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	6,000 Sq. Ft.		City of Seattle	12/20/2018

Delete Selected Entries

Weekly Operating Hours

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	65		City of Seattle	12/20/2018

Delete Selected Entries

Number of Workers on Main Shift

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	12		City of Seattle	12/20/2018

Delete Selected Entries

Number of Computers

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	12		City of Seattle	12/20/2018

Delete Selected Entries

Percent That Can Be Heated

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	50 % or more		City of Seattle	12/20/2018

Delete Selected Entries

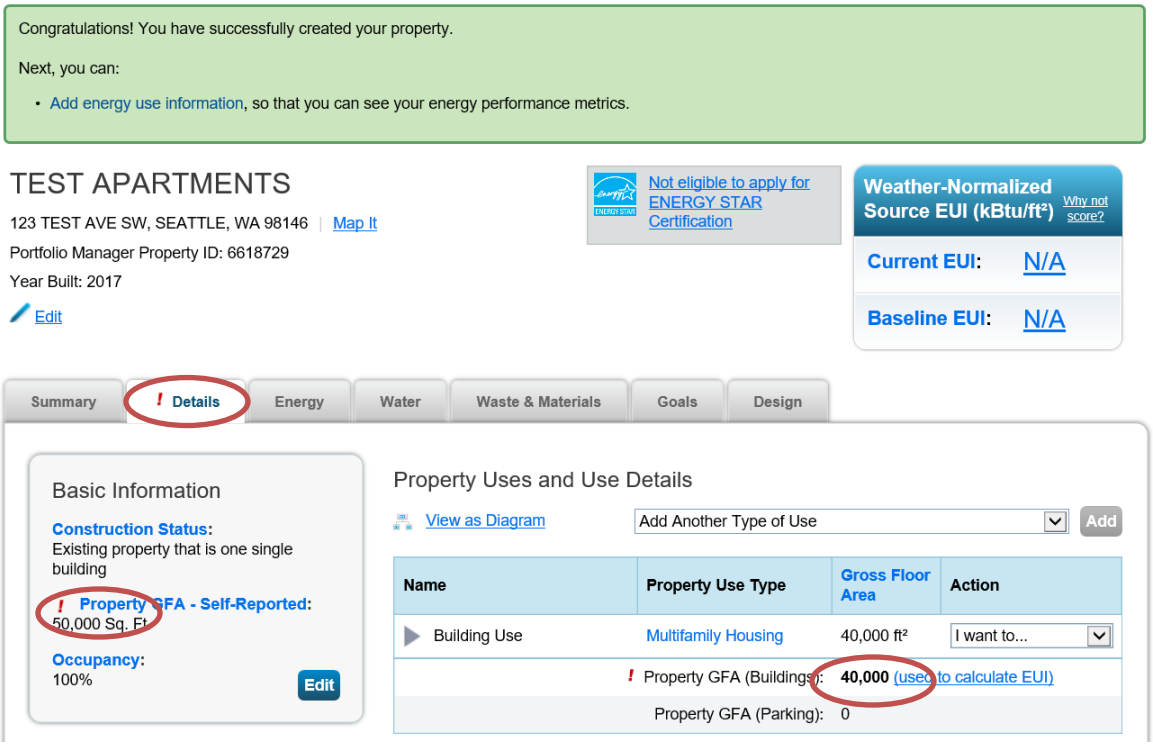
Percent That Can Be Cooled

	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/2017 (to present)	50 % or more		City of Seattle	12/20/2018

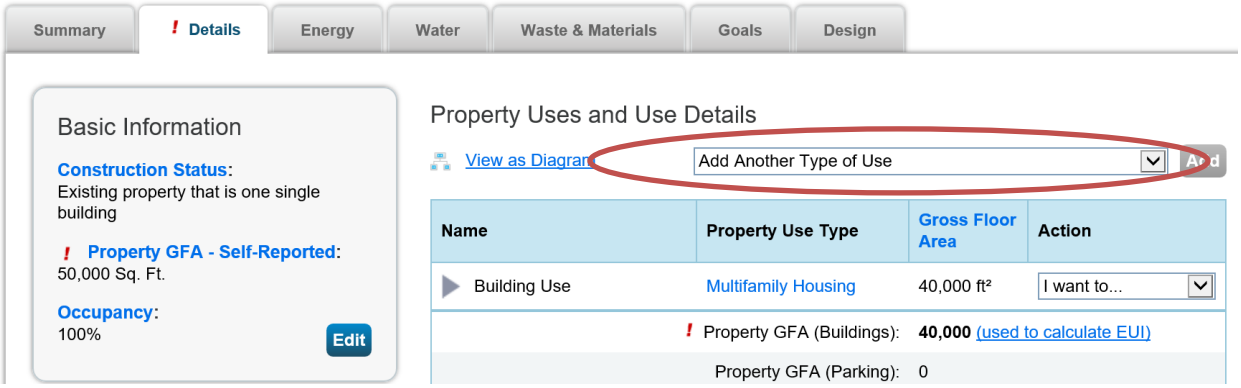
Errors with GFA/Adding Additional Space Uses:

The Gross Floor Area (GFA) that you entered when setting up your property will automatically populate into the Property Use and Use Details section. If your property has multiple uses, you would be required to adjust this number based on the actual GFA for the primary type of use. If you need to add more space uses (i.e. retail, office, restaurant), do so but make sure they all total up to the same value you entered under the Basic Information section.

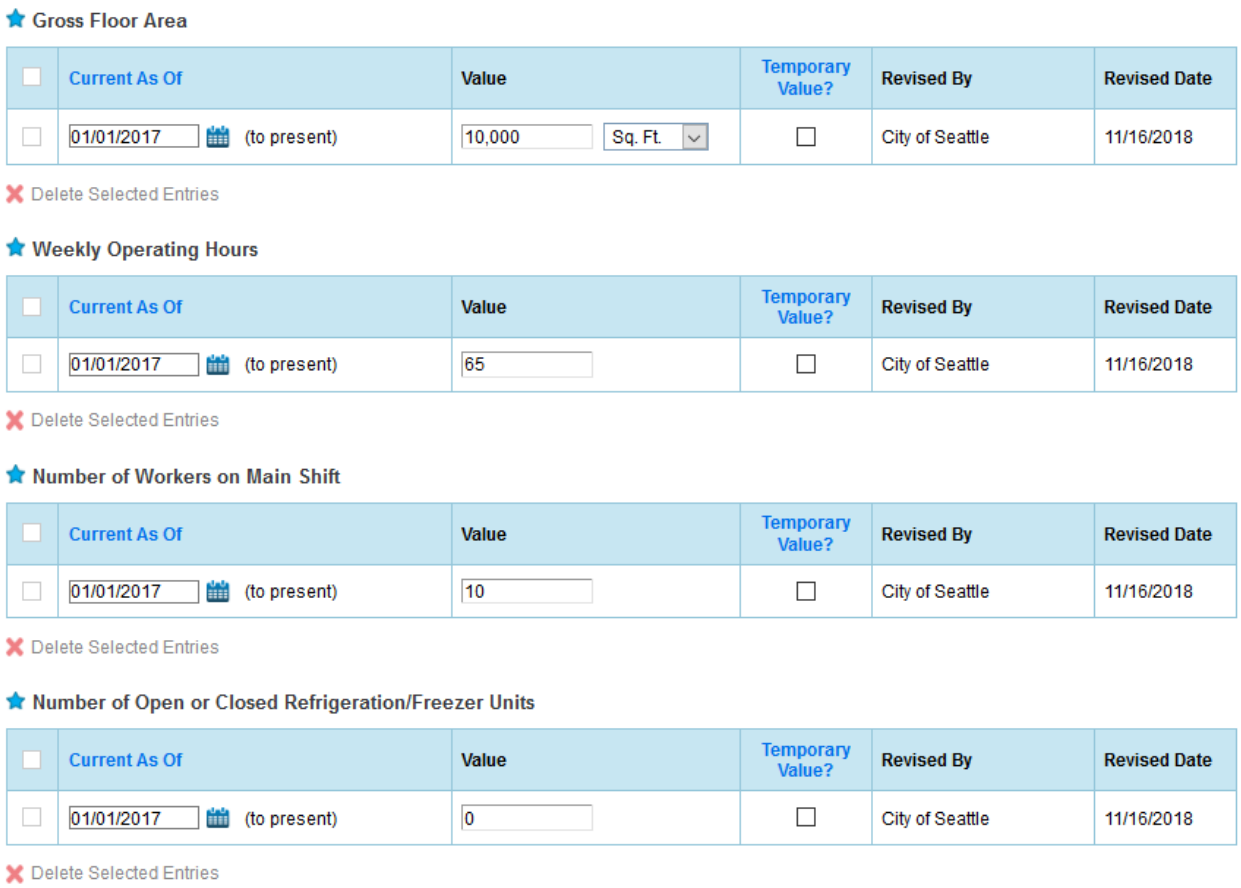
Once your new property is created, double check your Details tab for alerts. GFA values under the Basic Information and Property Uses and Use Details sections must be the same. If these values do not match up, you will see a red exclamation mark indicating an error as shown below.



Let's say that this property is missing its Retail space. To add new use types, go to the drop down menu, "Add Another Type of Use" and select the appropriate property type. In this example, we have selected, "Retail".

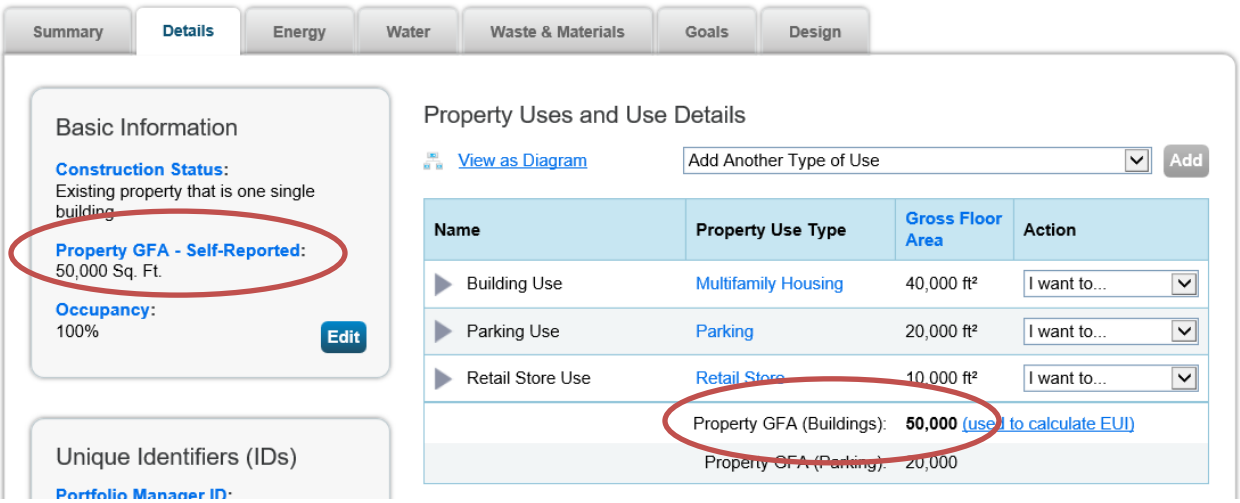


Once the selection is made and the property use is added, a new page will open. You will be asked to enter in your use values here. Again, remember to avoid using default values and temporary values here when you are prompted to enter in space use values. And DO NOT change the "Current As Of" Dates to the left. Save Changes.



You will notice that with the new space type, the Property GFA total has been updated from 40,000 SQFT to 50,000 SQFT matching the value to the left under the Basic Information section. The red exclamation has disappeared indicating that GFA error has been corrected.

Please note that although parking is entered as 20,000 SQFT, it is not counted towards the total building GFA. This is because Energy Star assesses the building and not its parking area. Please refer to Energy Star's "How do I enter parking" section on details on how to enter your parking information.



Parking

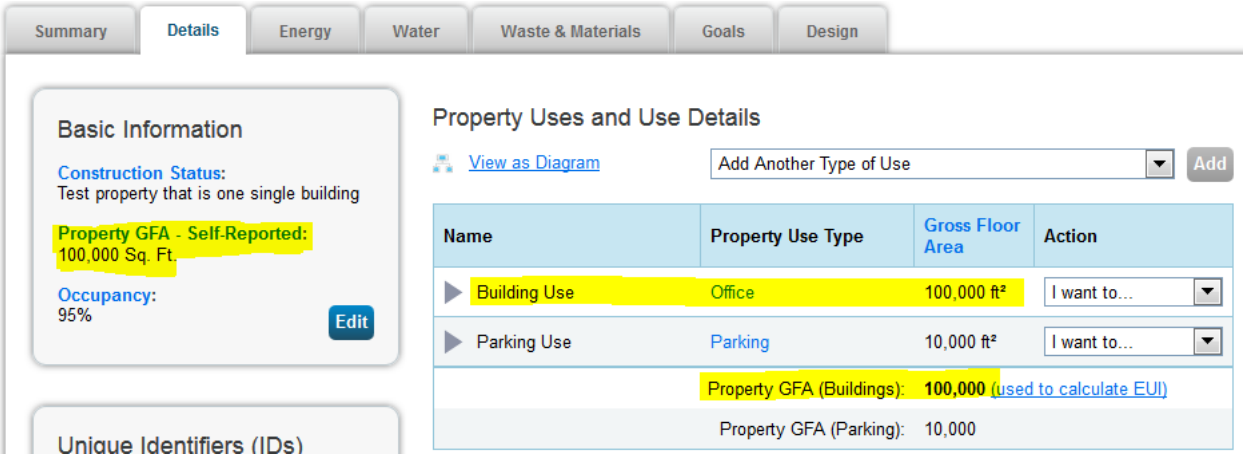
How do I enter parking?

You have two options to receive an ENERGY STAR score for a property with a parking:

1. **Sub-meter your parking and exclude its energy and Gross Floor Area (GFA). (*Recommended*)**
   a. Do not enter a parking Property Use
   b. Do not enter the energy for your parking
   c. If your parking garage ***is physically connected*** with your building and part of a single structure, then the **parking (Fully or Partially Enclosed) cannot be more than 75% of the total Property GFA.** For example, a property that is 100,000 square foot, with 80,000 sq ft Parking and 20,000 sq ft Office is considered a Parking Garage by EPA and is not permitted to earn ENERGY STAR certification. This limit does not apply to Open Parking Lots.
   d. If your parking garage ***is not physically connected*** to your building, but rather is a separate structure then there is no limit as to its size.

2. **Benchmark your parking with your building and include its energy and GFA.**
   a. Do not include Parking GFA in your Self-reported Property GFA
   b. Include your Parking GFA in a separate "Parking" Property Use
      - Report the GFA of each type of parking (Fully Enclosed, Partially Enclosed, and Open)

c. Include all parking energy in your energy meters.
d. Regardless of physical connection, the GFA of your Parking (Fully Enclosed and Partially Enclosed) **cannot account be more than 50%** of your total Property GFA.



Why? The ENERGY STAR score provides an assessment of the building, not its parking area. If it is not possible to sub-meter your parking area, then Portfolio Manager will estimate the amount of energy parking uses and subtract that out before calculating your metrics.

Learn more in our technical reference for parking: http://www.energystar.gov/buildings/tools-and-resources/energy-star-score-parking .

Resource: Energy Star FAQ
https://portfoliomanager.zendesk.com/hc/en-us/articles/211696747-How-do-I-enter-parking-

Appendix E

Submitting Seattle City Light Data Exchange Authorization

Fill out the SCL Consumption Request Form included in the last page of this appendix and email the form to SCL_Portfolio_Manager@seattle.gov

How to Fill out the Form:

Select **New Request** for all new buildings **OR**

Select **Add/Remove/Change Meters** for buildings you've already submitted this form for that need to be either corrected or updated with new information (NOTE: You will select New Request if prior owner or management firm submitted the request form in the past and you are now benchmarking under a new Portfolio Manager Username Account).

Portfolio Manager Username: This is the Username you created to log in to Portfolio Manager account

Building Name: Name of the building that is listed in Portfolio Manager

Primary Address: Main address of the building

Alternate Address: Please include all other street addresses that are part of your property. These include all residents and commercial space addresses as well. Attach a separate Word Doc if the list is too long.

Recent Construction: Yes if it's within the last 3 years and No if it's older

Is there more than one electric utility account associated w/building? Select Yes if there are multiple SCL account holders from the building (for example, apartment or retail buildings with 2 or more SCL accounts). And select No if there is only 1 SCL account holder (example: commercial building with one 1 tenant).

Owner/Authorized Management Firm: Enter your contact information here. The email address you list here will be where SCL will send the Authorization Credentials form and Meter List to.

Authorized Consultant: Mark N/A unless you are hiring a third party consultant to benchmark the property for you. If yes, have them fill out this section.

Account Holder Signature: You will only need the Account Holder signature if you've answered "NO" for the question, "Is there more than one electric utility account associated w/building?" If you have multiple SCL account holders for the building, you can skip to Owner or Authorized Agent Signature Section.

Owner or Authorized Agent Signature: You can either have the Owner of the building sign the form OR select the Authorized Agent box and sign the form yourself. The person that will be benchmarking this property is considered the "Authorized Agent".

Once submitted, your request form will be processed within five business days. Look in your email for the Automated Benchmarking Authorization form (Word Doc) AND Meter List (Excel) from SCL. If you do not hear back within the timeframe, email Gwen at SCL_Portfolio_Manager@seattle.gov for your status update.

*NOTE: Please wait to complete below steps until **AFTER** you receive your email attachments from SCL.*

Once you have received your Automated Benchmarking Authorization form (Word Doc) AND Meter List (Excel) from SCL :

1. Confirm that your meter list is accurate. If you have 100 residential units and see less numbers of meters listed on the Excel spreadsheet, that is an obvious indicator that some meters are missing. Email Gwen at SCL_Portfolio_Manager@seattle.gov to get your meter list corrected.

	A	B	C	D	E	F	G	H
1	Filtered by Premise ID 3744506912				SAMPLE METER LIST			
2								
3	Premise	Meter	Status	Service Address				
4	40153643	446055	ACTIVE	1234 5TH AVE NE APT 101, SEATTLE, WA, 98105-6454				
5	7.1E+08	446022	ACTIVE	1234 5TH AVE NE APT 102, SEATTLE, WA, 98105-6454				
6	8.01E+08	445991	ACTIVE	1234 5TH AVE NE APT 103, SEATTLE, WA, 98105-6454				
7	1.39E+09	446058	ACTIVE	1234 5TH AVE NE APT 104, SEATTLE, WA, 98105-6454				
8	2.92E+09	446015	ACTIVE	1234 5TH AVE NE APT 105, SEATTLE, WA, 98105-6454				
9								

2. Once your Meter List is accurate, log in to Portfolio Manager account with the Authorized Portfolio Manager Username listed on your Seattle City Light Authorization form.

City of Seattle, Seattle City Light

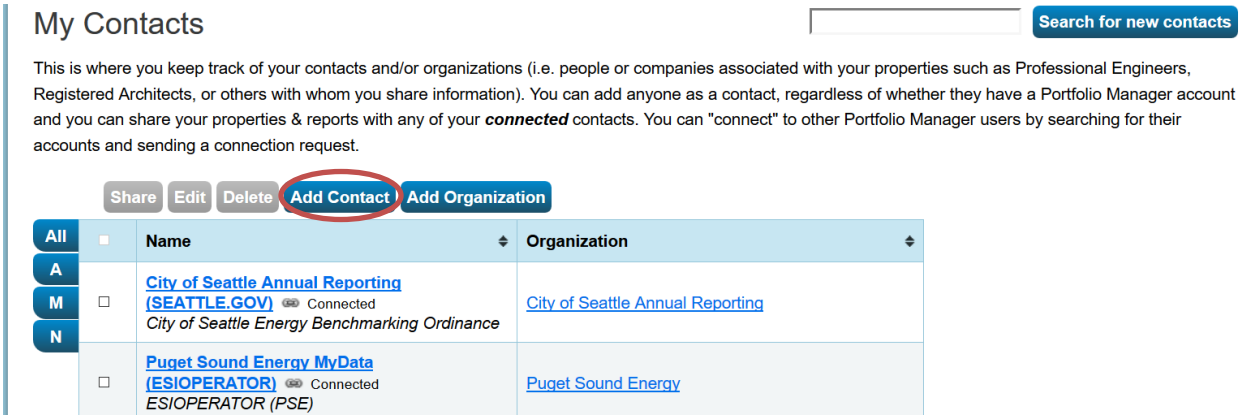
Portfolio Manager Automated Benchmarking Authorization

PART 1: Authorization Credentials *(Information provided by Seattle City Light)*	
Please read our Terms and Conditions:	http://seattle.gov/light/accounts/energyusage/docs/abs_tcs.pdf
Meters included in profile:	Verify the meters listed in the attachment are accurate. If you do not agree with the meter list or if there was no attachment, email scl_portfolio_manager@seattle.gov
Authorized Portfolio Manager Username:	USERNAME (SAMPLE)
Virtual Meter Name:	1234_5th_ave_ne_sampleapts_11092017ppi3744506912 (SAMPLE)
Parent Premise ID:	3744506912 (SAMPLE)

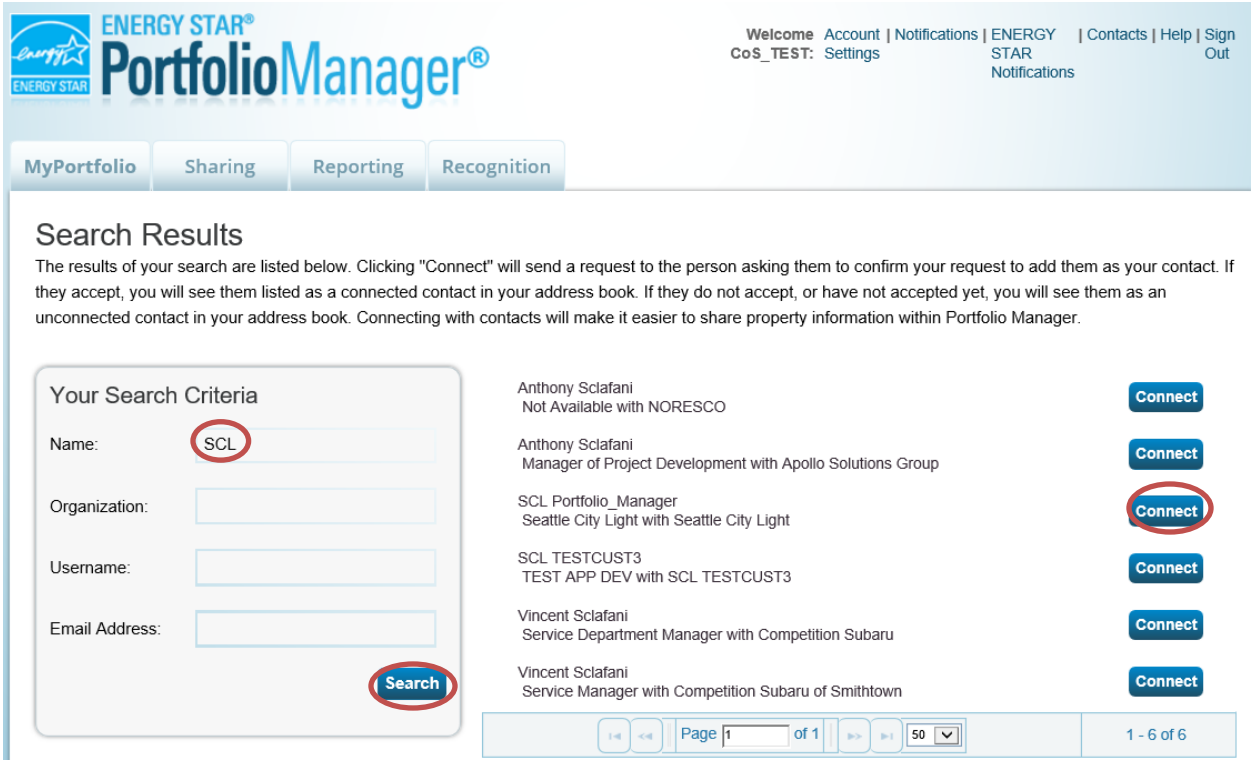
¨ If you have not previously added SCL as a contact, you will need to add them:

1. Click the contacts link in the upper right hand corner when you log in to Portfolio Manager.

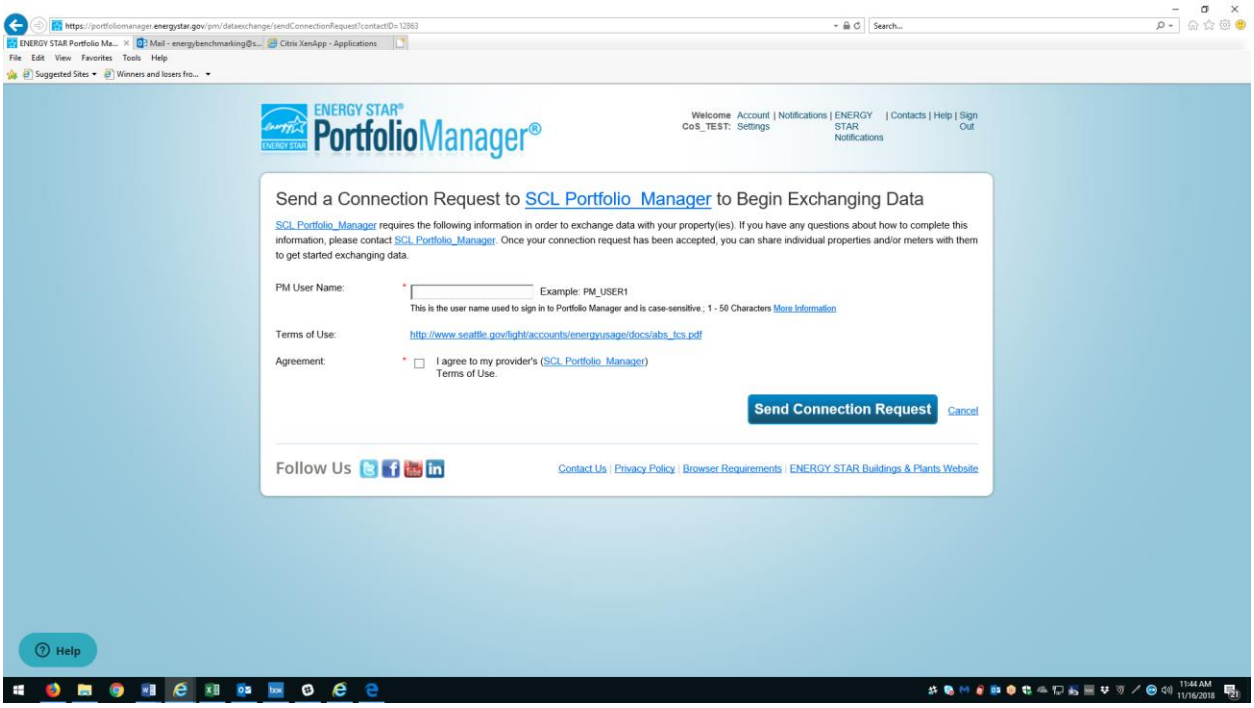
2. Click on Add Contact



3. Under Your Search Criteria, enter SCL as Name. Enter or click Search.
4. From the list of contacts, locate SCL Portfolio_Manager.
5. Click the Connect button to the right of the name.



6. When prompted, enter your Portfolio Manager Username in all uppercase letters, check the Terms of Use and then Send Connection Request button.

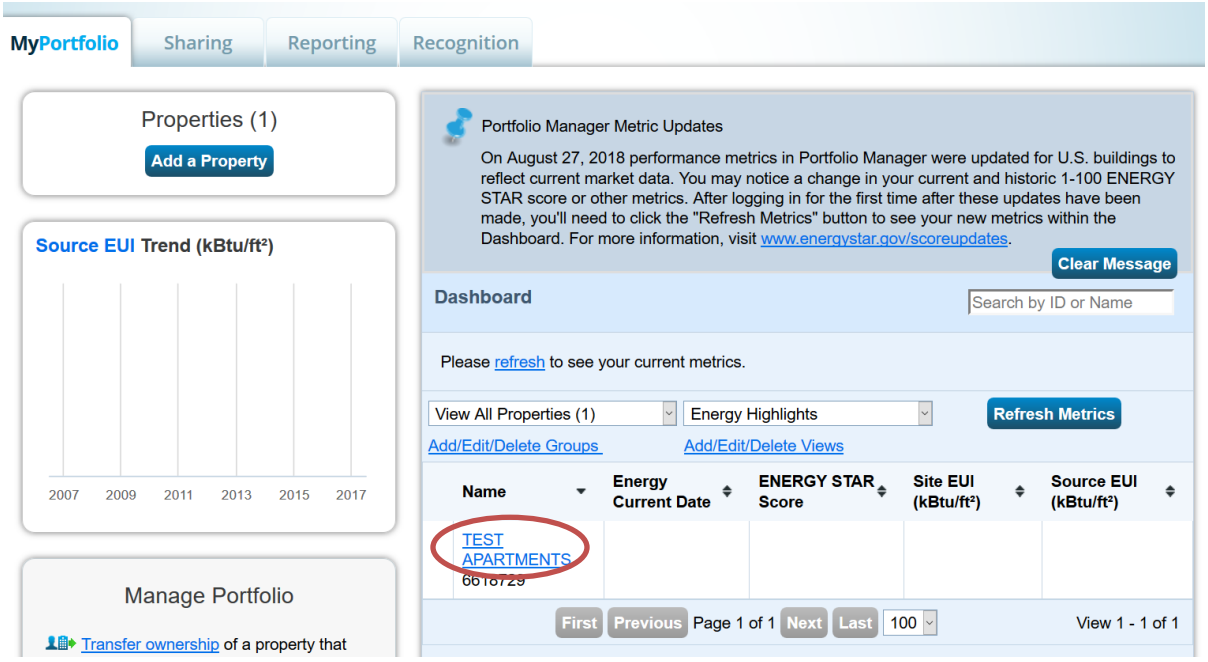


7. This connection request should be accepted in approximately 1 hour. Please wait before proceeding.

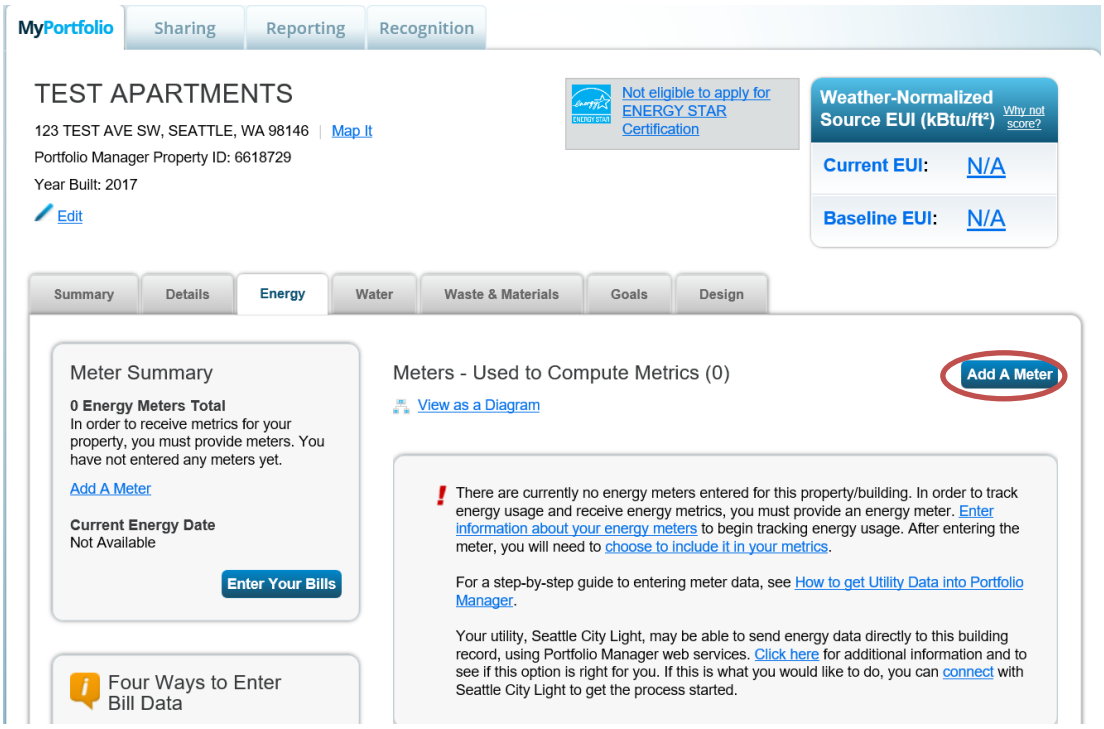
3. Connection Approval and Virtual Meter Setup

¨ Log in to Portfolio Manager.

-Under the MyPortfolio tab, click on your property name that is listed under your Dashboard.



¨ Go to your property's Energy tab, then click Add A Meter.

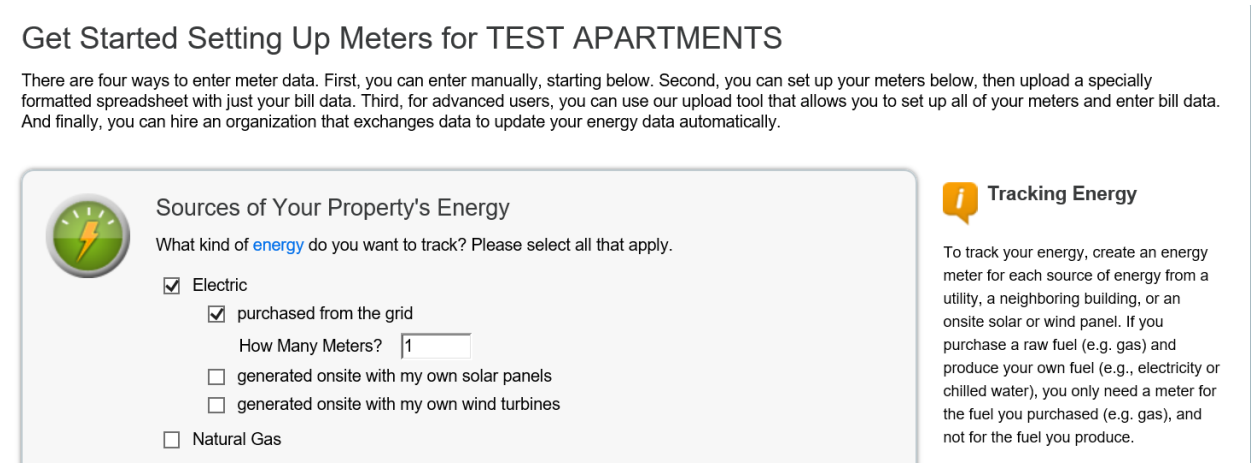


In the Get Started Setting Up Meters section, answer the questions:

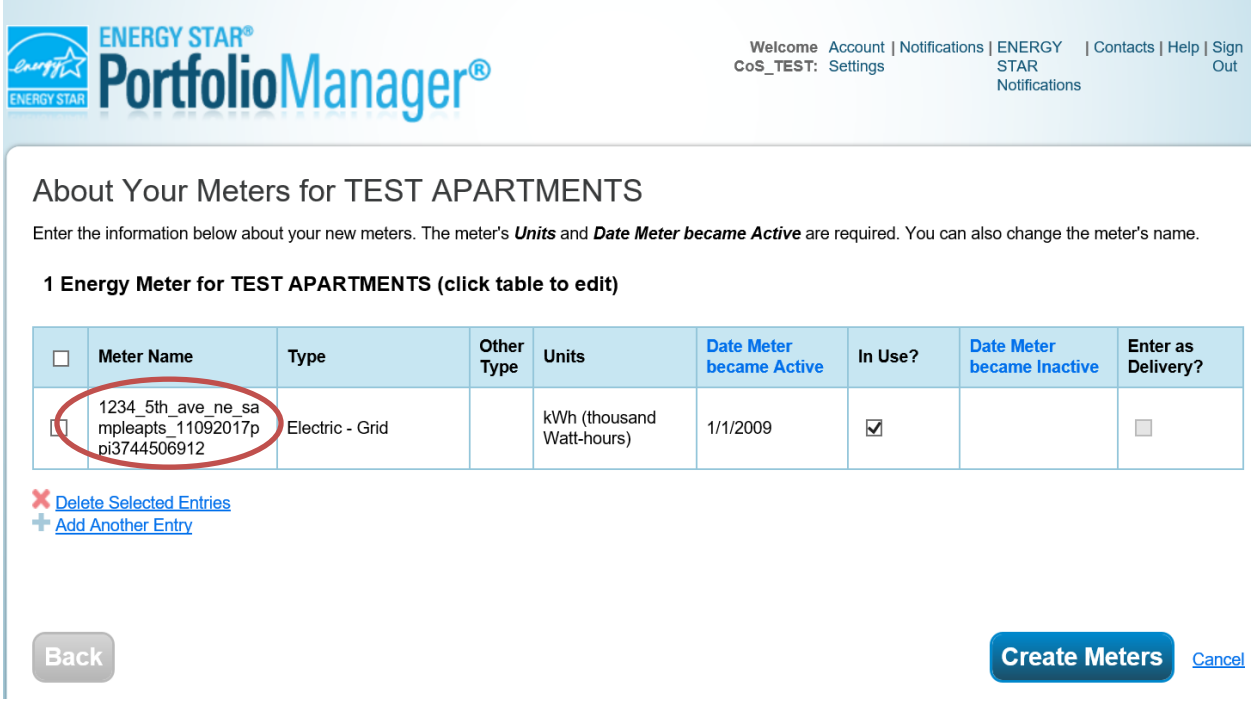
1. Under Sources of Your Property's Energy check Electric and purchased from the grid.

2. For How Many Meters? Enter 1.

3. Scroll down below the Water Usage section and click Get Started!



¨ On the next page, in the Meter Name column, click on the words: Electric Grid Meter.



1.Replace the words: Electric Grid Meter with the Virtual Meter Name that SCL provided on the authorization form.

City of Seattle, Seattle City Light

Portfolio Manager Automated Benchmarking Authorization

PART 1: Authorization Credentials *(Information provided by Seattle City Light)*	
Please read our Terms and Conditions:	http://seattle.gov/light/accounts/energyusage/docs/abs_tcs.pdf
Meters included in profile:	Verify the meters listed in the attachment are accurate. If you do not agree with the meter list or if there was no attachment, email scl_portfolio_manager@seattle.gov
Authorized Portfolio Manager Username:	USERNAME (SAMPLE)
Virtual Meter Name:	1234_5th_ave_ne_sampleapts_11092017ppi3744506912 (SAMPLE)
Parent Premise ID:	3744506912 (SAMPLE)

2. Under Units, select kWh (thousand kilowatt hours).

3. Under Date Meter Became Active, type in: 01/01/2009. (Leave "Inactive" date blank and "Enter as Delivery" un-checked.)

4. Click Create Meters.

5. Click Continue.

On Select Energy Meters to Include in Metrics page:

1. Check all of the meters.

2. Select: These meter(s) account for the total energy consumption for this property.

3. At the bottom of the screen, click the Apply Selections button.

Select Meters to Include in Metrics

Tell us which meters to include when calculating the metrics for TEST APARTMENTS so that we can provide you with the most accurate metrics possible.

Summary

1

Meters representing the **total** energy consumption for TEST APARTMENTS (a single building).

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of

Energy Meters

Select all meters to be included in your metrics. (Hint: Most meters should be included unless they are sub-meters.)

☐	Name Meter ID	Type
☑	1234_5th_ave_ne_sampleapts_11092017ppi3744506912 49776541	Electric - Grid

Total of 1 meter(s). Tell us what this represents:

* ◉ These meter(s) account for the total energy consumption for TEST APARTMENTS (a single building).

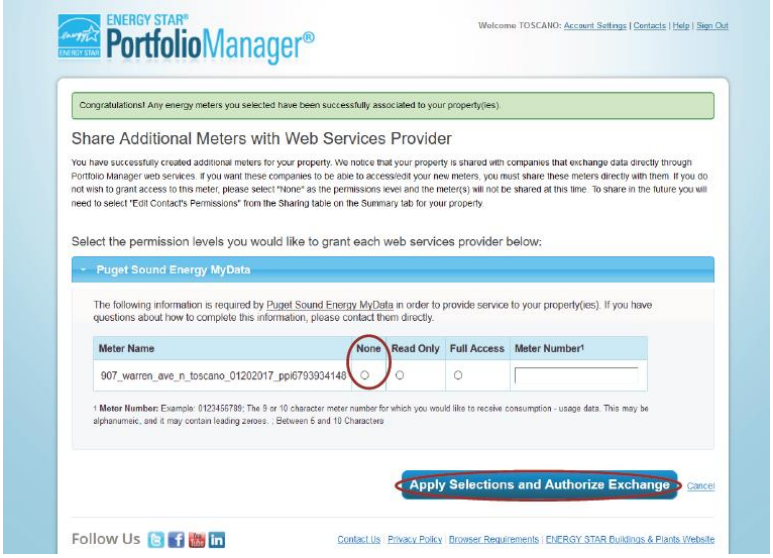
○ These meter(s) do not account for the total energy consumption for TEST APARTMENTS (a single building).

4. Select Permission Levels for Other Web Services Providers

>If you are using other automated data services (such as Puget Sound Energy), then you will be given the option to allow other utilities to view your Seattle City Light data.

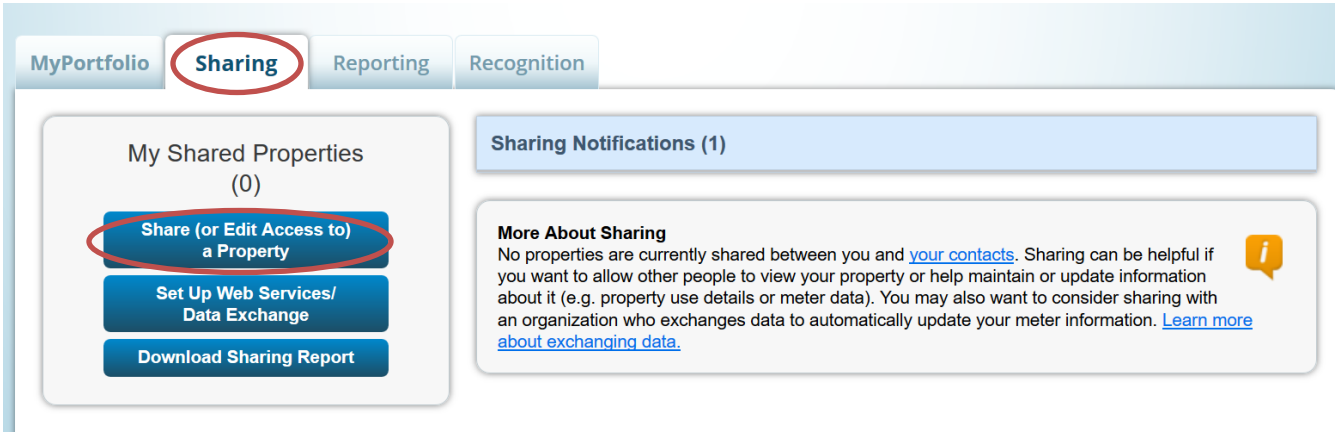
>On the **Share Additional Meters with Web Services Provider** page, select "None" on the **Puget Sound Energy MyData** tab.

>Select **Apply Selections and Authorize Exchange.**



5. Share Property with Seattle City Light

¨ Go to the Sharing Tab and click Share (or Edit Access to) a Property.

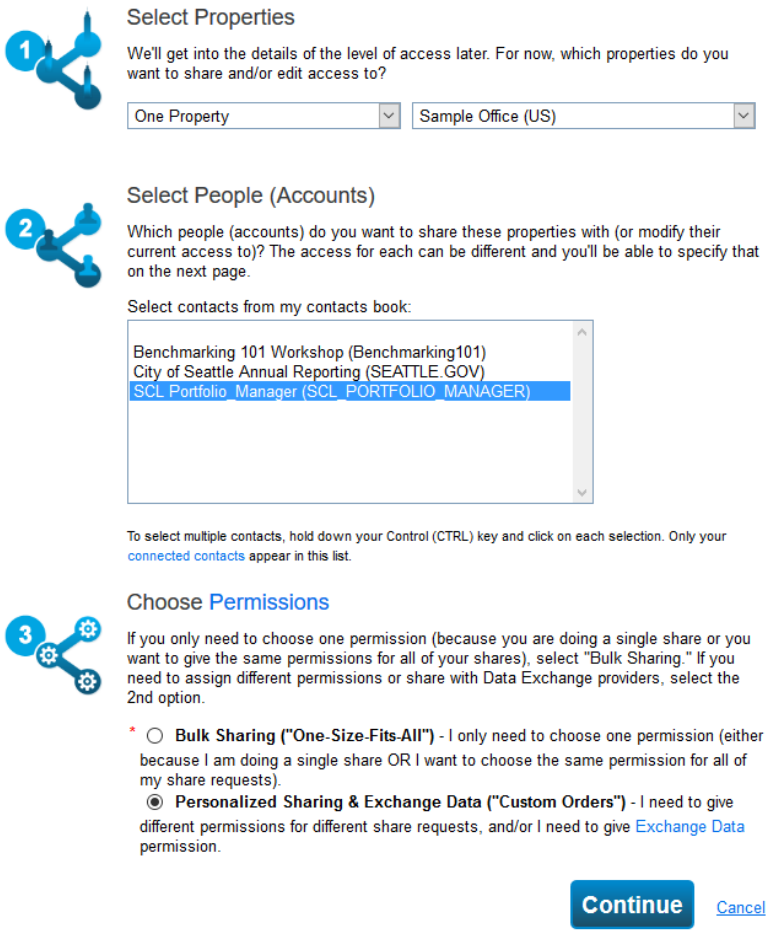


1. Select One Property and then choose the building to connect to SCL.

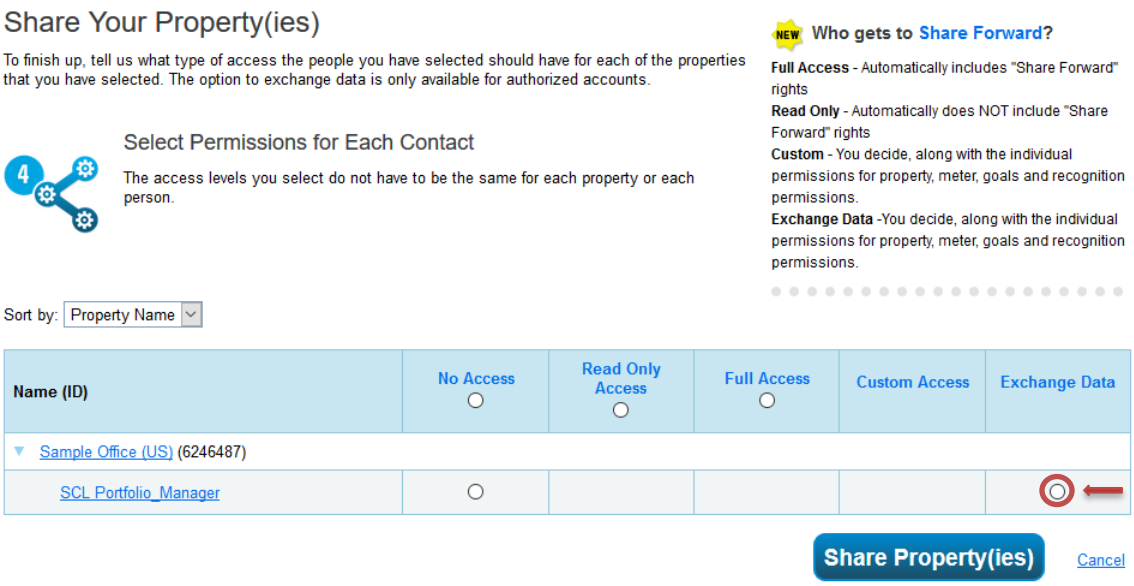
2. Select contact, Portfolio_Manager, SCL.

3. Under Choose Permissions, select the second option: “Personalized Sharing & Exchange Data.”

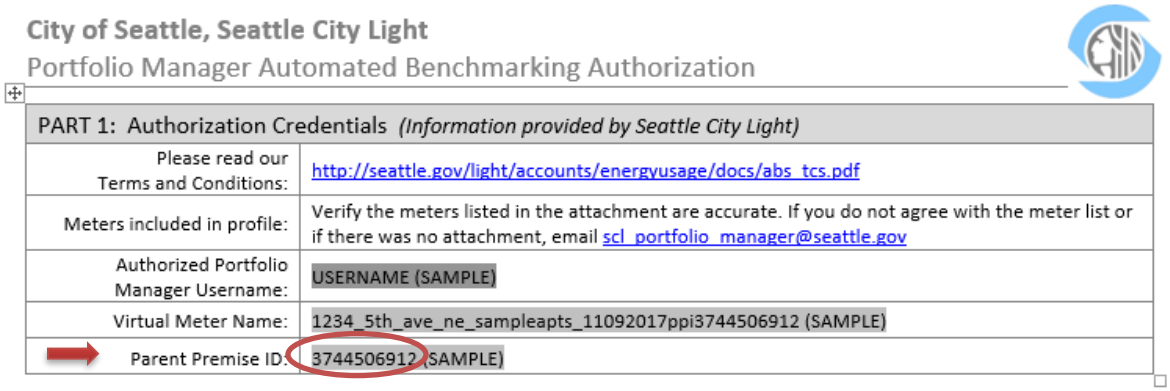
4. Click Continue.



¨ On the next screen, select the Exchange Data button, which will pop-up the Access Permissions window



1. In the pop-up window, enter the Premise ID number found at the top of your SCL Authorization Form.



City of Seattle, Seattle City Light

Portfolio Manager Automated Benchmarking Authorization

PART 1: Authorization Credentials *(Information provided by Seattle City Light)*	
Please read our Terms and Conditions:	http://seattle.gov/light/accounts/energyusage/docs/abs_tcs.pdf
Meters included in profile:	Verify the meters listed in the attachment are accurate. If you do not agree with the meter list or if there was no attachment, email scl_portfolio_manager@seattle.gov
Authorized Portfolio Manager Username:	USERNAME (SAMPLE)
Virtual Meter Name:	1234_5th_ave_ne_sampleapts_11092017ppi3744506912 (SAMPLE)
Parent Premise ID:	3744506912 (SAMPLE)

You need to enter the Premise ID number in TWO places as shown below.

Select Access Permissions to Sample Office (US) for SCL Portfolio_Manager.
The following information is required by SCL Portfolio_Manager in order to provide service to your property(ies). If you have any questions about ho
complete this information, please contact them directly.

PremiseID: * 3744506912 Example: 1234567890

Parent Premise ID associated with the property and is provided by SCL Portfolio Manager or SCL Representative.; 1 - 10 Characters Mor
Information

Select the permission level below that you would like to grant SCL Portfolio_Manager for each category.

Item	None	Read Only Access	Full Access	PremiseID1
Property Information	○	◉	○	
▼ All Meter Information				
▼ Energy Meters				
1234_5th_ave_ne_sampleapts_11092017ppi3744506912	○	○	◉	3744506912

2.IMPORTANT: Set the Access Permissions exactly as follows:

Property Information: Read Only Access
SCL Virtual Meter Name: Full Access
For any other meters listed: None
Goals, Improvements: None
Recognition: None

3. Scroll down. For Share Forward, select "No".

4. Scroll down the window and click Apply Selections & Authorize Exchange.

Goals, Improvements, & Checklists	◉	○	○	
Recognition	◉		○	

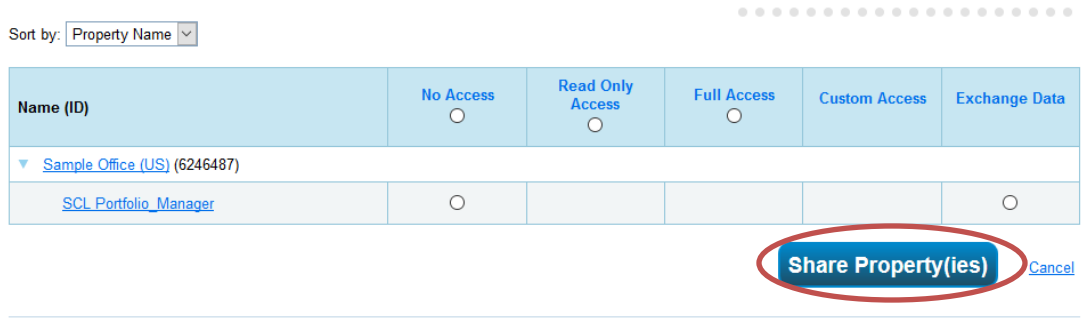
The provider with whom you are sharing does not support this meter type.
1 **PremiseID:** Example: 1234567890; Parent Premise ID associated with the property and is provided by SCL Portfolio Manager or SCL Representative.; Between 1 and 10 Characters More Information

Additional Options:

Item	Yes	No
* **Share Forward** Allow SCL Portfolio_Manager to share this property with others and give them any permissions that he/she has, including the right to share with more people.	○	○

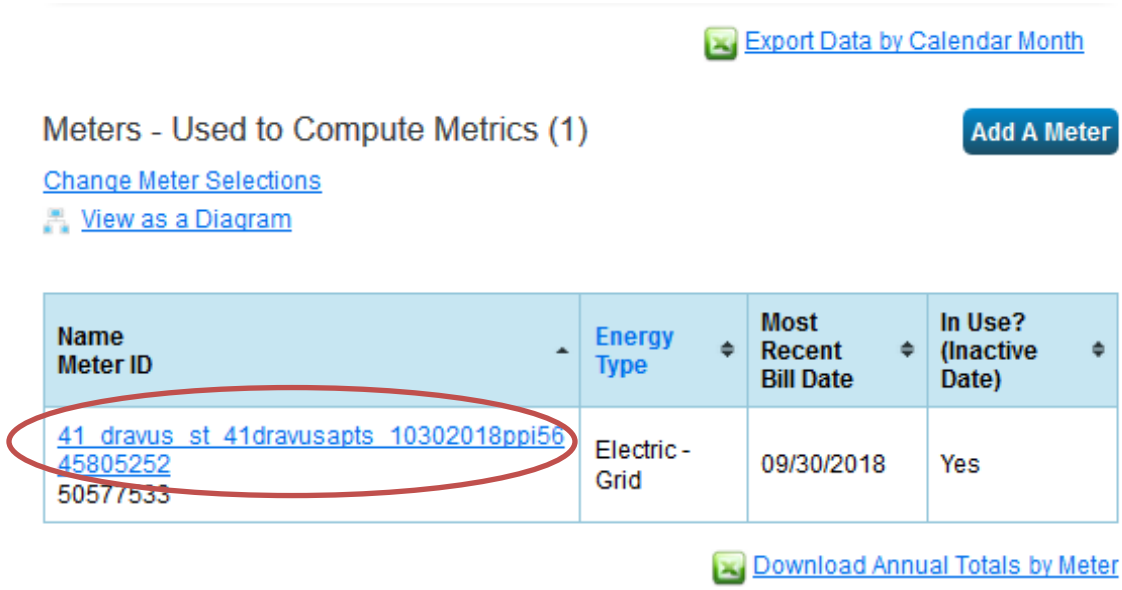
Apply Selections & Authorize Exchange Cancel

¨ This will open the Sharing window again. Click on the Share Property(ies) button to finish.



¨ You should see data in your Virtual Meter in about four hours. Thereafter, SCL will update this meter monthly

To verify SCL data in your Portfolio Manager account, log in to your Portfolio Manager account and go to your property's Energy tab. Scroll down and click on your SCL meter as shown below:



If you have January 1st – Dec 31st data from the reporting year, you have full data to report to the City of Seattle. (NOTE: You will see a 3-month lag with all SCL Automated Consumption Data.)

☐	5/1/2017	5/31/2017	23,587.7	2,106.93	☐	☐			12/5/2018 SCL Portfolio Manager
☐	6/1/2017	6/30/2017	22,994.08	2,056.12	☐	☐			12/5/2018 SCL Portfolio Manager
☐	7/1/2017	7/31/2017	24,884.02	2,239.90	☐	☐			12/5/2018 SCL Portfolio Manager
☐	8/1/2017	8/31/2017	24,655.42	2,208.97	☐	☐			12/5/2018 SCL Portfolio Manager
☐	9/1/2017	9/30/2017	22,936.97	2,012.92	☐	☐			12/5/2018 SCL Portfolio Manager
☐	10/1/2017	10/31/2017	24,925.37	2,179.30	☐	☐			12/5/2018 SCL Portfolio Manager
☐	11/1/2017	11/30/2017	27,522.35	2,384.99	☐	☐			12/5/2018 SCL Portfolio Manager
☐	12/1/2017	12/31/2017	29,100.35	2,563.06	☐	☐			12/5/2018 SCL Portfolio Manager
☐	1/1/2018	1/31/2018	32,014.22	3,011.43	☐	☐			12/5/2018 SCL Portfolio Manager
☐	2/1/2018	2/28/2018	28,905.62	2,730.40	☐	☐			12/5/2018 SCL Portfolio Manager
☐	3/1/2018	3/31/2018	27,304.97	2,555.25	☐	☐			12/5/2018 SCL Portfolio Manager
☐	4/1/2018	4/30/2018	25,773.05	2,410.27	☐	☐			12/5/2018 SCL Portfolio Manager
☐	5/1/2018	5/31/2018	21,052.55	1,964.90	☐	☐			12/5/2018 SCL Portfolio Manager
☐	6/1/2018	6/30/2018	20,464.22	1,911.50	☐	☐			12/5/2018 SCL Portfolio Manager
☐	7/1/2018	7/31/2018	22,209.5	2,074.82	☐	☐			12/5/2018 SCL Portfolio Manager
☐	8/1/2018	8/31/2018	22,492.37	2,091.22	☐	☐			12/5/2018 SCL Portfolio Manager

RETURN TO HOW TO GUIDE STEP 3B IF YOUR BUILDING HAS NATURAL GAS -IF NOT- PROCEED TO STEP 4 OF THE HOW TO GUIDE TO COMPLETE THE BENCHMARKING PROCESS

City of Seattle, Seattle City Light

Portfolio Manager Automated Benchmarking Consumption Request*

Instructions

1. Typing is preferred, so the information is legible.
2. Before filling out this form, setup your User Account in Portfolio Manager.
3. Do not setup your meter in Portfolio Manager. We will supply your meter information.
4. Read our Terms and Conditions: http://seattle.gov/light/accounts/energyusage/docs/abs_tcs.pdf
5. You do not need the Account Holder signature, if there is more than one account holder in the building.

New Request ☐ ***Add/Remove/Change Meters*** ☐

To be completed by Building Owner or Authorized Property Management Agent:							
Portfolio Manager Username	*(Carefully choose your Userid. We strongly discourage changes in Userids, unless absolutely necessary.)*						
Building Name		Primary Address			Zip		
Alternate Address(es)	Example: Side or rear entrance with alternate street address.						
Recent Construction?	Yes ☐ No ☐	Is there more than one electric utility account associated w/building?	Yes ☐ No** ☐	*(If No, Account Holder's signature required, below.)*			
Additional Comments	List any additional information that will help Seattle City Light with your request.						
Owner/Authorized Management Firm				Tel	( ) - x		
Mailing Address		City		State		Zip	
Email							
Authorized Consultant?	N/A ☐		Tel	( ) - x			
Mailing Address		City		State		Zip	
Email							
Account Holder** *(Required, if there is only one electric utility account associated w/building.)*	I authorize Seattle City Light to release the energy use and/or account data to the Building Owner/Authorized Agent. I agree to release and hold Seattle City Light and the City of Seattle harmless from any liability, claims, or damages related to the release of such data. Print Name Sign _____				Date		
Owner ☐ **or Authorized Agent** ☐	Print Name	Sign	_____		Date		

EMAIL THIS FORM TO SCL_PORTFOLIO_MANAGER@SEATTLE.GOV OR **FAX** TO 206.287.5305

New Requests: *Please allow 5 business days for processing.*
Add/Remove/Change Meters: *Please allow 5 business days to process meter changes.*

***NOTE**: Actual data changes won't occur until the monthly update.*

700 Fifth Avenue, Suite 3200, P.O. Box 34023, Seattle, WA 98124-4023
Tel: (206) 684-7557, Fax: (206) 287-5305, E-mail: SCL_Portfolio_Manager@seattle.gov