

Using EPA Energy Star® Portfolio Manager® To Benchmark Municipal Buildings

And Document Completion Of Sustainable CT Energy Actions 6.1 And 6.2

JULY 2018

Today's Presenters

- Lynn Stoddard, Sustainable CT
- Zach Shelin, Cadmus on behalf of EPA Energy Star
- Rick Mascoli, Eversource
- Andy Brydges, Eversource
- Sheri Borelli, United Illuminating

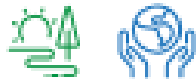
Agenda



- Overview of Sustainable CT Energy Actions
- Setting Up Your EPA Portfolio Manager® Account, Building Properties, Creating Meters
- Requesting to Share Automated Data Transfer with Eversource, with UI
- Portfolio Manager Data Request to Document Completion of Sustainable CT Action 6.1 "Benchmark and Track Energy Use" and 6.2 "Reduce Energy Use Across All Municipal Buildings"
- Q&A

6.1 Benchmark and Track Energy Use

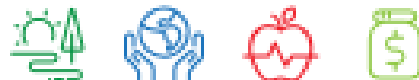
5 Points



- THIS ACTION HAS VARIABLE POINTS: 5, 10

6.2 Reduce Energy Use Across All Municipal Buildings

10 Points



- THIS ACTION HAS VARIABLE POINTS: 10, 20, 30, 40, 50

6.3 Achieve High Energy Performance for Individual Buildings

5 Points



• THIS ACTION HAS VARIABLE POINTS: 5 – 100

6.4 Increase Use of Renewable Energy in Municipal Buildings

10 Points



• THIS ACTION HAS VARIABLE POINTS: 10, 20, 30, 40, 50

Part 1

CREATING YOUR PORTFOLIO MANAGER[®] ACCOUNT

Visit:

<https://portfoliomanager.energystar.gov/pm/signup>

PORTFOLIO MANAGER LIVE DEMONSTRATION



www.energystar.gov/portfoliomanager

The screenshot displays the Energy Star Portfolio Manager website. The top navigation bar includes links for 'ABOUT ENERGY STAR' and 'PARTNER RESOURCES'. The main header features the Energy Star logo and the tagline 'The simple choice for energy efficiency.' Below this, there are four main categories: 'ENERGY EFFICIENT products', 'ENERGY SAVINGS at home', 'ENERGY EFFICIENT new homes', and 'ENERGY STRATEGIES FOR buildings & plants'. The 'Buildings & Plants' section is highlighted, with a sub-navigation bar for 'Owners and managers', 'Service providers', 'Program administrators', 'Tenants', 'Tools and Resources', and 'Training'. The 'Existing buildings' dropdown menu is open, showing options like 'Learn the benefits', 'Get started', and 'Use Portfolio Manager'. The 'Use Portfolio Manager' section is selected, displaying a description of the tool and a 'Log in' button. The login form is circled in red, showing the username 'ekatezayko1' and a masked password. Below the login form is a 'PORTFOLIO MANAGER DATA COLLECTION WORKSHEET' section with a 'LEARN MORE' button. The bottom of the page features a 'Join the rest of the industry' banner.

www.energystar.gov/portfoliomanager

ABOUT ENERGY STAR PARTNER RESOURCES

The simple choice for energy efficiency.

ENERGY EFFICIENT products ENERGY SAVINGS at home ENERGY EFFICIENT new homes ENERGY STRATEGIES FOR buildings & plants

Home » Buildings & Plants » Owners and managers » Existing buildings » Use Portfolio Manager

Buildings & Plants

about us | press room | help desk | portfolio manager login

Owners and managers Service providers Program administrators Tenants Tools and Resources Training

Existing buildings

Learn the benefits

Get started

Use Portfolio Manager

How Portfolio Manager helps you save

The benchmarking starter kit

Identify your property type

Enter data into Portfolio Manager

The data quality checker

How Portfolio Manager calculates metrics

Interpret your results

Verify and document your savings

Share and request data

Updates to ENERGY STAR scores with CBECS data

Get help accessing your utility data

Track waste and materials

Save energy

Find financing

Earn recognition

Communicate your success

Resources for your property

ENERGY STAR® PortfolioManager®

The most-used energy measurement and tracking tool for commercial buildings.

Use Portfolio Manager

You've heard it before: you can't manage what you don't measure. That's why EPA created ENERGY STAR Portfolio Manager®, an online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions. Use it to benchmark the performance of one building or a whole portfolio of buildings, all in a secure online environment.

Not sure if Portfolio Manager is for you? It is!

You can use Portfolio Manager to manage the energy and water use of any building. Seriously. Any building. K-12 school? Check. Office building? Check. Stadium? Check. We could keep going. All you need are your energy bills and some basic information about your building to get started.

Are you designing a new commercial building? You can also use Portfolio Manager to set your energy use target and see how your estimated design energy stacks up against similar existing buildings nationwide.

2017 ENERGY STAR TOP CITIES

1. Washington, DC
2. Los Angeles
3. New York

SEE WHO ELSE MADE THE LIST!

ENERGY STAR® PortfolioManager®

EPA's online energy management and tracking tool enables you to measure and track the energy and water performance of any building over time. [Register now](#)

Log in

username

password

[Forgot password?](#)

[Forgot username?](#)

[LOGIN](#)

PORTFOLIO MANAGER DATA COLLECTION WORKSHEET

Easily see what information is required for your property and create a PDF or Word worksheet to help collect the data.

[LEARN MORE](#)

Join the rest of the industry


Create a
username
and
password

Log in

Navigate Portfolio Manager

Portfolio
level view

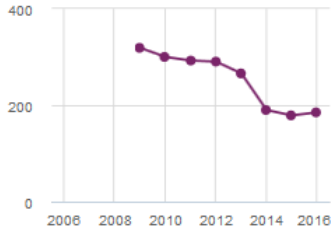


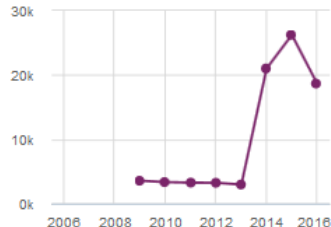
**ENERGY STAR®**
PortfolioManager®

Welcome ekatezayko1: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | [Sharing](#) | [Reporting](#) | [Recognition](#)

Properties (14)
[Add a Property](#)

Source EUI Trend (kBtu/ft²)


Total GHG Emissions Trend (Metric Tons CO2e)


Notifications (7) [View All](#)

[Bernal Office Building](#) - Sharing request sent to [Chris Weatherly](#)
[Heinlein Office Bldg](#) - Sharing request sent to [Chris Weatherly](#)

[Cancel](#)
[Clear](#)
[Cancel](#)
[Clear](#)

Properties (14) (Count includes 4 child properties. Expand carets to view.)
[Add a Property](#)
Filter by: [View All Properties \(14\)](#) [Search](#)
[Create Group](#) | [Manage Groups](#)

Name	Action
Bernal Office Building	I want to...
Durango Office Building	I want to...
Heinlein Office Bldg	I want to...
Ortega Office Tower	I want to...
Pepco Test Building Zayko	I want to...
Sample K-12 School (US)	I want to...
Sample Library (US)	I want to...

Creating your Portfolio Manager® Account

- Register your account through the EPA website

The screenshot shows the 'Create an Account' page for ENERGY STAR Portfolio Manager. The page is divided into two main sections: 'Accessing Your Account' and 'About Yourself'. The 'Accessing Your Account' section includes fields for Username, Password, and Confirm Password. The Password field has a note: 'Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).'. The 'About Yourself' section includes fields for First Name, Last Name, Job Title, Email, Confirm Email, Phone, and Country (a dropdown menu). There is also a Language dropdown set to 'English'. At the bottom, there are radio buttons for 'Reporting Units': 'Conventional EPA Units (e.g., kBtu/ft²)' (selected) and 'Metric Units (e.g., GJ/m²)'. On the right side, there are two informational sections: 'Getting Started' and 'Accounts for Organizations'. The 'Getting Started' section says: 'Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.' The 'Accounts for Organizations' section says: 'If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division'. At the top right, there are links for 'Help | Login' and 'Language: English | Français'. At the top left, there is a logo for 'ENERGY STAR Portfolio Manager®'.

ENERGY STAR® Portfolio Manager®

Help | Login
Language: English | Français

Already have an account? [Sign In Here](#)

Create an Account

Accessing Your Account

Username: *

Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

Confirm Password: *

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: * Select Country

Language: English

Reporting Units:

- ☒ Conventional EPA Units (e.g., kBtu/ft²)
- ☐ Metric Units (e.g., GJ/m²)

Getting Started

Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.

Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

Adding Properties to Your Account

ENERGY STAR® PortfolioManager®

Welcome ES_StateTest1: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | Sharing | Reporting | Recognition

Properties (5)

Add a Property

Notifications (0)

You have no new notifications.

Source EUI Trend (kBtu/ft²)

200
100
0

2006 2008 2010 2012 2014 2016

Total GHG Emissions Trend (Metric Tons CO2e)

Properties (5) (Count includes 2 child properties. Expand carrots to view.) **Add a Property**

Filter by: View All Properties (5) Search Search

[Create Group](#) | [Manage Groups](#)


Name	Action
CT DAS/CT DEEP Mobile Enviro. Lab Bldg	I want to...
CT Dept of Environmental Protection	I want to...
CTDEEP Headquarters Building (Hartford)	I want to...

Page 1 of 1 200 View 1 - 3 of 3

- Click on **“Add a Property”** to get started

Property Information

- Choose your property type
- Select the number of buildings on your property
- Select your construction status
- Click “Get Started!”




Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

K-12 School

▼

[Learn more about Property Types.](#)



Your Property's Buildings


How many physical buildings do you consider part of your property?

☐ None: My property is part of a building

☒ One: My property is a single building

☐ More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?



Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?


☒ **Existing:** My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.

☐ **Design Project:** My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.


☐ **Test Property:** This is not a real property. I am entering it to test features, or for other purposes such as training.

Get Started!


Cancel

 Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

 Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

 Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

Property Information

- Fill out the basic property information

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name: *

Country: *

Street Address: *

City/Municipality: *

State/Province: *


Postal Code: *

[Year Built:](#) *

Gross Floor Area: * ☐ [Temporary Value](#)

Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not including parking. [Details on what to include.](#)

[Irrigated Area:](#)

 **Tip**

The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

.....

- Add other usage types, if applicable

Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

[Basic Information](#)

Name:	Test Building	Country:	US
Property Type:	Office	Address:	123 Main Street Hartford, CT 06101  Map It
Year Built:	1980		
Property consists of:	1 building		

[Edit](#)

Property Usage Details

- Fill out usage details for your property
- Any information denoted by a blue star is required to receive an Energy Star® certification on your building

▼ Building Use [Edit Name](#)

Office refers to buildings used for the conduct of commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area (GFA) should include all space within the building(s) including offices, conference rooms and auditoriums, break rooms, kitchens, lobbies, fitness areas, basements, storage areas, stairways, and elevator shafts.

If you have restaurants, retail, or services (dry cleaners) within the Office, you should most likely include this square footage and energy in the Office Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

- If it is a [Property Use Type that can get an ENERGY STAR Score](#) (note: Retail can only get a score if it is greater than 5,000 square feet)
- If it accounts for more than 25% of the property's GFA
- If it is a vacant/unoccupied Office
- If the Hours of Operation differ by more than 10 hours from the main Property Use

[More on this rule.](#)

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	<input type="text" value="25,000"/> <input type="text" value="Sq. Ft."/> ▼	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text" value="65"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text" value="20"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text" value="25"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text" value="50 % or more"/> ▼ <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text" value="50 % or more"/> ▼ <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

Back

Add Property [Cancel](#)

Confirmation

MyPortfolio | **Sharing** | **Reporting** | **Recognition**

Congratulations! You have successfully created your property.

Next, you can:

- [Add energy use information](#), so that you can see your energy performance metrics.


Test Building

123 Main Street, Hartford, CT 06101 | [Map It](#)

Portfolio Manager Property ID: 5731444

Year Built: 1980

[Edit](#)

[Not eligible to apply for ENERGY STAR Certification](#)

Weather-Normalized Source EUI (kBtu/ft²) Why not score?
Current EUI: [N/A](#)
Baseline EUI: [N/A](#)

Summary | Details | Energy | Water | Waste & Materials | Goals | Design

Notifications (0)

You have no new notifications.

Property Profile

You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about

Metrics Summary

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A

Congratulations, you've created your first property!

Part 2

ENTERING METER INFORMATION

Adding Meters to a Building

The screenshot displays the 'MyPortfolio' web application interface. At the top, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. On the left sidebar, there is a 'Properties (6)' section with an 'Add a Property' button, and a 'Source EUI Trend (kBtu/ft²)' line graph showing data from 2006 to 2016. Below the graph is a 'Total GHG Emissions Trend (Metric Tons CO2e)' section. The main content area on the right shows 'Notifications (5) View All' and a 'Properties (6)' section. The 'Properties (6)' section includes a filter dropdown set to 'View All Properties (6)', a search bar, and links for 'Create Group' and 'Manage Groups'. Below this is a table with two columns: 'Name' and 'Action'. The table lists four properties: 'CT DAS/CT DEEP Mobile Enviro. Lab Bldg', 'CT Dept of Environmental Protection', 'CTDEEP Headquarters Building (Hartford)', and 'Test Building'. Each property has an 'I want to...' dropdown in the 'Action' column. A red arrow points from the 'Test Building' row to the 'Add a Property' button in the left sidebar.

MyPortfolio

Sharing Reporting Recognition

Properties (6)
Add a Property

Source EUI Trend (kBtu/ft²)

200 150 100 50 0

2006 2008 2010 2012 2014 2016

Total GHG Emissions Trend (Metric Tons CO2e)

Notifications (5) [View All](#)

Properties (6) (Count includes 2 child properties. Expand carrots to view.)

Filter by: View All Properties (6) Search

[Create Group](#) | [Manage Groups](#)

Name	Action
CT DAS/CT DEEP Mobile Enviro. Lab Bldg	I want to...
CT Dept of Environmental Protection	I want to...
CTDEEP Headquarters Building (Hartford)	I want to...
Test Building	I want to...

Page 1 of 1 200

- Select the building to which you want to add a meter

Adding a Meter

- Click on the **“Energy”** tab on your property overview
- Click on the **“Add a Meter”** button

The screenshot shows a web interface with a top navigation bar containing tabs: Summary, Details, Energy, Water, Waste & Materials, Goals, and Design. The 'Energy' tab is selected and circled in red. Below the tabs, the 'Meter Summary' section on the left indicates '0 Energy Meters Total' and provides instructions on how to add meters, with an 'Add A Meter' link and an 'Enter Your Bills' button. The 'Meters - Used to Compute Metrics (0)' section on the right features an 'Add A Meter' button circled in red, a 'View as a Diagram' link, and a detailed informational message about the necessity of energy meters for tracking usage, accompanied by several helpful links.

Summary Details **Energy** Water Waste & Materials Goals Design

Meter Summary
0 Energy Meters Total
In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.
[Add A Meter](#)
Current Energy Date
Not Available
[Enter Your Bills](#)

Meters - Used to Compute Metrics (0)
[View as a Diagram](#)
! There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. [Enter information about your energy meters](#) to begin tracking energy usage. After entering the meter, you will need to [choose to include it in your metrics](#).
For a step-by-step guide to entering meter data, see [How to get Utility Data into Portfolio Manager](#).


Four Ways to Enter Bill Data
1. Manually
2. Use our [simple spreadsheet](#) (one meter) to upload or Copy/Paste
3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)
4. [Find an organization](#) to electronically enter your data into Portfolio Manager

Selecting Fuel Types

- Select the types of meters your property uses
- Fill out any additional details about your meter
- Click “**Continue**” when finished

Get Started Setting Up Meters for Test Building

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meter with a formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to upload data. And finally, you can hire an organization that exchanges data to update your energy data automatically.



Sources of Your Property's Energy

What kind of **energy** do you want to track? Please select all that apply.

☒ Electric

☒ purchased from the grid

How Many Meters?

☐ generated onsite with my own solar panels☐ generated onsite with my own wind turbines

☒ Natural Gas

How Many Meters?

☐ Propane☐ Fuel Oil (No. 2)☐ Diesel☐ District Steam☐ District Hot Water☐ District Chilled Water☐ Fuel Oil (No. 4)☐ Fuel Oil (No. 5 and No. 6)☐ Coal (anthracite)☐ Coal (bituminous)☐ Coke☐ Wood☐ Kerosene☐ Fuel Oil (No. 1)

Filling out Meter Details

About Your Meters for Test Building

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

2 Energy Meters for Test Building (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
<input type="checkbox"/>	57xxxxxxxxx	Natural Gas		ccf (hundred cubic feet)	1/1/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	51xxxxxxxxx	Electric - Grid		kWh (thousand Watt-hours)	1/1/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>

[✖ Delete Selected Entries](#)
[+ Add Another Entry](#)

[Back](#) [Create Meters](#) [Cancel](#)

- **Meter Name** – Enter your full 11-digit electric or natural gas account number
- **Units** – Select the fuel unit from the drop-down menu. Eversource bills in **kWh** (thousand Watt-hours) for electric and **ccf** (hundred cubic feet) for natural gas
- **Date Meter became Active** – Eversource will only transmit data from 1/1/2013 to current date

Manually Entering Data

Your Meter Entries for Test Building

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

2 Energy Meter(s) for Test Building

▼ 57xxxxxxxxx

Start Date	End Date	Usage ccf (hundred cubic feet)	Cost (\$)	Estimation
Click to add an entry				

✖ [Delete Selected Entries](#)
+ [Add Another Entry](#)
📖 [Learn how to copy/paste](#)

Upload data in bulk for this meter:

📘 You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

▶ 51xxxxxxxxx

[Cancel](#)

- Skip this page by clicking “**Continue**” unless you plan to manually enter usage data

Confirming Created Meters

Your meter entries have been added to your meters!

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for [Test Building](#) so that we can provide you with the most accurate metrics possible.

Summary

2

Meters representing the total energy consumption for [Test Building](#) (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 those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

Energy Meters

Select all meters to be included in your Energy metrics. (Hint: All meters should be included unless they are [sub-meters](#).)

<input type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	57xxxxxxxxx 25499822	Natural Gas
<input checked="" type="checkbox"/>	51xxxxxxxxx 25499823	Electric - Grid

Total of 2 meter(s). Tell us what this represents:

* ☒ These meter(s) account for the total energy consumption for [Test Building](#) (a single building).

☐ These meter(s) do not account for the total energy consumption for [Test Building](#) (a single building).

[Apply Selections](#) [Cancel](#)

- Verify your created meters and confirm they account for the entire property consumption

Confirmation

The screenshot shows the 'MyPortfolio' interface with the 'Energy' tab selected. A green confirmation banner at the top states: 'Congratulations! Any energy meters you selected have been successfully associated to your property(ies)'. Below this, the property details for 'Test Building' are shown, including the address '123 Main Street, Hartford, CT 06101' and 'Portfolio Manager Property ID: 5731444'. A 'Weather-Normalized Source EUI (kBtu/ft²)' box shows 'Current EUI: N/A' and 'Baseline EUI: N/A'. The 'Meters - Used to Compute Metrics (2)' section contains a table with two meters: 'Electric - Grid' and 'Natural Gas'. A 'Meter Summary' box on the left indicates '2 Energy Meters Total' and '2 - Used to Compute Metrics'. A red circle highlights the confirmation banner.

MyPortfolio | Sharing | Reporting | Recognition

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

Test Building
123 Main Street, Hartford, CT 06101 | [Map It](#)
Portfolio Manager Property ID: 5731444
Year Built: 1980
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/ft²) Why not score?
Current EUI: [N/A](#)
Baseline EUI: [N/A](#)

Summary | Details | **Energy** | Water | Waste & Materials | Goals | Design

Meter Summary
2 Energy Meters Total
2 - Used to Compute Metrics
[Add A Meter](#)
Current Energy Date
Not Available
[Enter Your Bills](#)

Meters - Used to Compute Metrics (2) [Add A Meter](#)
[Change Meter Selections](#)
[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
51xxxxxxxxx 25499823	Electric - Grid		Yes
57xxxxxxxxx 25499822	Natural Gas		Yes

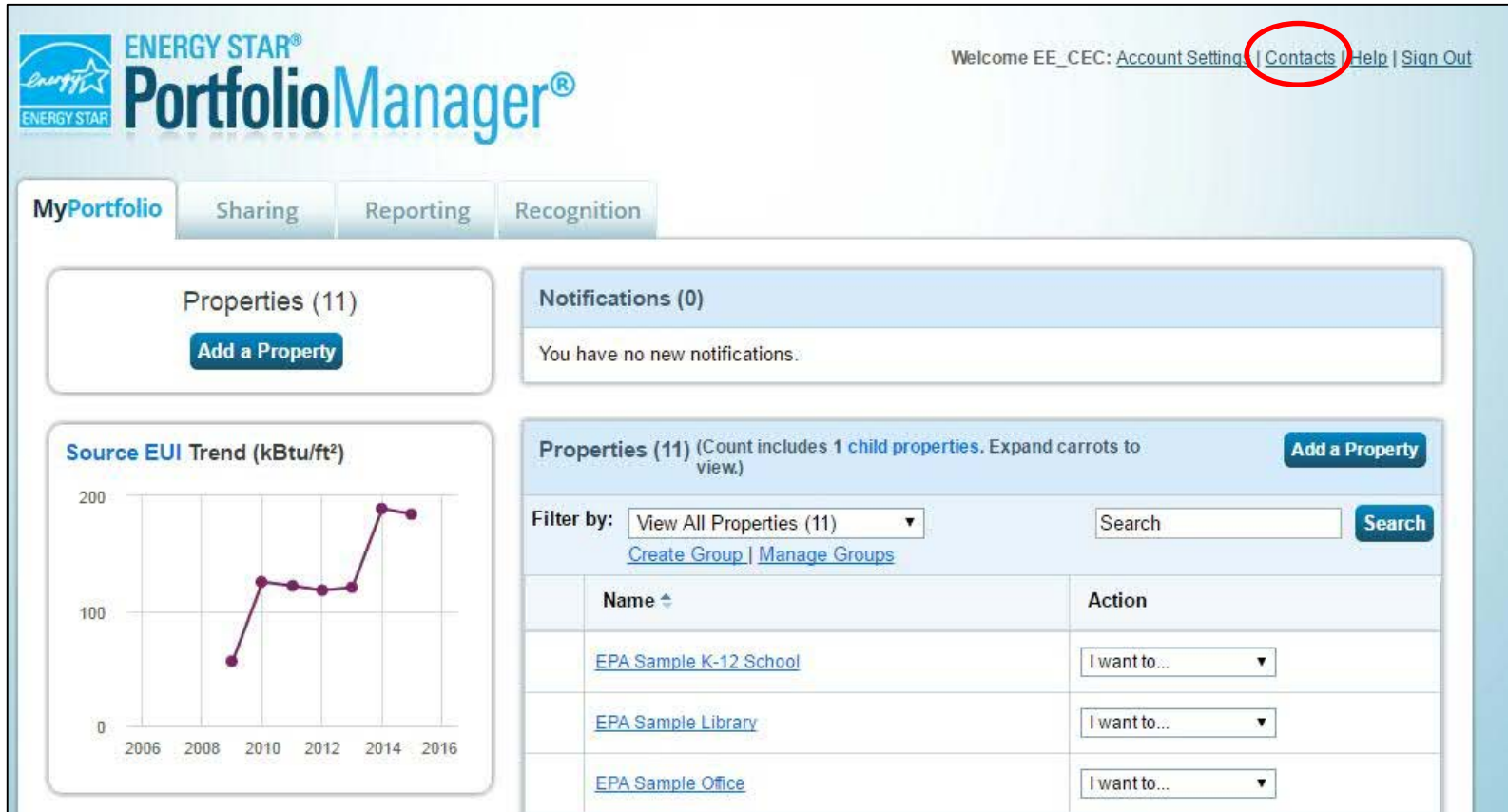
[Download Annual Totals by Meter](#)

Congratulations, you've created your meters!

Part 3

SETTING UP AUTOMATIC DATA TRANSFER

Accessing Your Contacts



The screenshot shows the ENERGY STAR Portfolio Manager interface. In the top right corner, the navigation bar includes links for "Account Settings", "Contacts" (circled in red), "Help", and "Sign Out". The main content area is divided into several sections: "MyPortfolio" with tabs for "Sharing", "Reporting", and "Recognition"; "Properties (11)" with an "Add a Property" button; "Notifications (0)" with a message "You have no new notifications."; "Source EUI Trend (kBtu/ft²)" with a line graph showing data from 2006 to 2016; and a "Properties (11)" section with a filter dropdown set to "View All Properties (11)", a search bar, and a table of properties.

Name	Action
EPA Sample K-12 School	I want to... ▼
EPA Sample Library	I want to... ▼
EPA Sample Office	I want to... ▼

- Click on the “**Contacts**” link from your home page to access your address book

Adding a Contact

My Contacts

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.

[Share](#) [Edit](#) [Delete](#) **[Add Contact](#)** [Add Organization](#)

<input type="checkbox"/>	Name	Organization
<input type="checkbox"/>	Eversource Clean Energy Communities (CTCleanCommunities) <small>Connected</small> EE	Eversource Energy
<input type="checkbox"/>	Eversource Utility	Eversource
<input type="checkbox"/>	syed sadath (syedsadath28@gmail.com) <small>Connected</small> Software Engineer	Test

[Share](#) [Edit](#) [Delete](#) **[Add Contact](#)** [Add Organization](#)

- Click the **“Add Contact”** button to bring up the search screen

Connecting with Eversource

- Search “*Eversource*” in the username field
- Click “**Connect**” on the account named: *Eversource Web Services*

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria










Name:

Organization:

Username:

Email Address:

Search

 Eversource Web Services IT Consultant with Eversource	Connect
  Benchmarking intern with Eversource	Connect
  EEC with Eversource	Connect
  Analyst with ICF International	Connect
  Energy Efficiency Consultant with Eversource Energy	Connect

Page 1 of 1

1 - 5 of 5

Connecting with UIL

- Search “*UILCEC*” in the username field
- Select the *United Illuminating Clean Energy Communities* and click “**Connect**”

The screenshot shows the 'MyPortfolio' interface with tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The 'Search Results' section contains a message explaining the 'Connect' function. On the left, the 'Your Search Criteria' box shows 'Name', 'Organization', 'Username' (filled with 'UILCEC'), and 'Email Address' fields, with a 'Search' button. On the right, a search result is displayed: 'UIL Web Service Portal' with the subtext 'Web Services Account with United Illuminating Clean Energy Communities'. This result is circled in red, and a 'Connect' button is visible to its right. Below the result is a pagination bar showing 'Page 1' and '1 - 1 of 1'.

Verifying Eversource Account Ownership

Send a Connection Request to [Eversource Web Services](#) to Begin Exchanging Data

[Eversource Web Services](#) requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [Eversource Web Services](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Relationship : * Example: 1
Enter 1 if you are owner, 2 if you are agent of an owner; 1 - 1 Characters

Your Name : * Example: John Mathew
Length: 1 - 50 Characters

Billing account # : * Example: 51123123456
Length: 8 - 11 Characters

Bill Start Date : * Example: 20160121
Enter the date Format as YYYYMMDD; 8 - 8 Characters

Bill End Date : * Example: 20160121
Enter the date Format as YYYYMMDD; 8 - 8 Characters

Individual Month Energy Usage Amount on Bill (kWh or CCF) : * Example: 73.32
Length: 1 - 15 Characters

Email : * Example: John@abc.com
Length: 1 - 50 Characters

Phone # : * Example: 781-321-0000
Length: 1 - 20 Characters

Terms of Use:

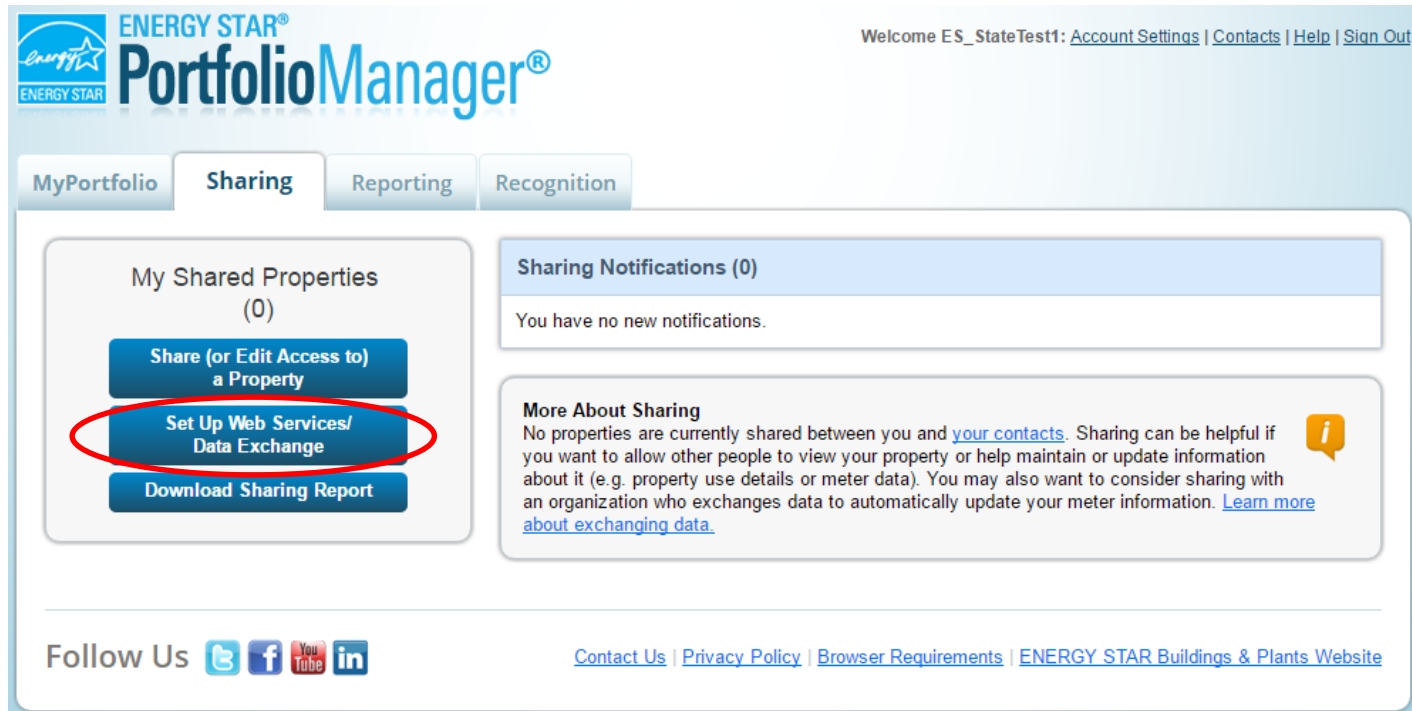
By submitting this request I understand that Eversource will provide my Portfolio Manager account with energy usage and billing data. Once approved, Eversource will have access to facility data from your listed properties. Eversource may use this data to recommend energy saving services. Eversource will not share your information or data with non-Eversource entities. Check the below box to agree to the aforementioned terms of use

Agreement: * ☒ I agree to my provider's ([Eversource Web Services](#)) Terms of Use.

[Send Connection Request](#) [Cancel](#)

- Fill in required fields with info from any recent bill to verify you are the account owner
- Ensure formatting matches the example
- Read the Terms of Use at the bottom of the page and check the box indicating agreement
- Verification will occur overnight

Sharing Properties



- Click on the “**Sharing**” tab from your home screen
- Click on the “**Set Up Web Services/Data Exchange**” button

Sharing Access to a Property

1. Select the “**Eversource Web Services**” account or the “**UIL Web Services**” account

2. Select the number of properties to set up for data transfer

3. Select the option for “**I want to provide different levels of access...**”

4. Click “**Set Permissions**”

The screenshot shows a web application interface for sharing properties. At the top, there are tabs: 'MyPortfolio', 'Sharing' (active), 'Reporting', and 'Recognition'. Below the tabs is the title 'Share Properties for Exchanging Data'. A progress bar shows four steps: 'Choose Permissions' (active), 'Set Up Connections', 'Check Existing Permissions', and 'View Results/Confirmation'. A paragraph explains that sharing allows for automatic data exchange with utility or service providers. The main content area has three numbered steps, each with a blue icon and a red arrow pointing to the corresponding instruction on the left:

- Step 1:** 'Select Web Services Provider (Account)'. It asks which web services provider to share with and provides a dropdown menu currently showing 'Eversource Web Services (Eversource)'.
- Step 2:** 'Select Properties'. It asks which properties to share, with a note that unsupported meter types will not be shared. It features two dropdown menus, one showing 'One Property' and the other 'CT Dept of Environmental Protection'.
- Step 3:** 'Choose Permissions'. It explains that users can choose one permission for all shares or assign different permissions. There are two radio button options: 'I want to set permission levels in bulk for all selected properties and meters.' (unselected) and 'I want to provide different levels of access for each property or to each individual meter within a property.' (selected).

At the bottom right, there are two buttons: 'Set Permissions' (blue) and 'Cancel' (light blue).

Beginning Data Exchange

The screenshot shows a web interface with tabs: MyPortfolio, Sharing, Reporting, and Recognition. The 'Sharing' tab is active. The main heading is 'Share Your Property(ies)'. Below it, a text block explains that access levels can be selected for each property. A section titled 'Select Permissions for Each Contact' includes a diagram with a blue circle containing the number '4' and three connected gear icons. Below this, a 'Sort by:' dropdown menu is set to 'Property Name'. A table lists properties with columns for 'Name (ID)', 'No Access', 'Read Only Access', 'Full Access', 'Custom Access', and 'Exchange Data'. The 'Exchange Data' column is circled in red. Two properties are listed: 'CT Dept of Environmental Protection (5047366)' and 'Eversource Web Services'. The 'Exchange Data' radio button for 'Eversource Web Services' is selected. At the bottom right, there are 'Share Property(ies)' and 'Cancel' buttons.

MyPortfolio | **Sharing** | Reporting | Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Sort by: Property Name ▼

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ CT Dept of Environmental Protection (5047366)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Eversource Web Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Share Property(ies) [Cancel](#)

NEW Who gets to Share Forward?

- Full Access** - Automatically includes "Share Forward" rights
- Read Only** - Automatically does NOT include "Share Forward" rights
- Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
- Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Select the “**Exchange Data**” option to begin account verification for that meter – this will automatically open next screen

Account Verification

Select Access Permissions to [CT Dept of Environmental Protection](#) for [Eversource Web Services](#).
The following information is required by [Eversource Web Services](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Select the permission level below that you would like to grant [Eversource Web Services](#) for each category.

Item	None	Read Only Access	Full Access	Is Eversource your service provider? Y/N ¹	ID2	Description ³
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
▼ All Meter Information						
▼ Energy Meters						
51-114803026	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="51997833074"/>
57-374040079	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="51997833074"/>
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="3028977056"/>

¹ Is Eversource your service provider? Y/N: Example: Y: Enter Y if Eversource is your service provider or N if not

*Note, you will have to use the horizontal scroll bar to see all entry fields

- Valid account information will be needed for each meter to verify the correct data will be sent
- Non-Eversource/UII meters will still have to be authorized here

United Illuminating Account Verification

Select Access Permissions to [CTLG Woodbridge Library 10NewtonRd](#) for [UIL Web Service Portal](#).

The following information is required by [UIL Web Service Portal](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Sharing on behalf of:

[Betsy Yagla](#)

Town Of Woodbridge
11 Meetinghouse Lane
Woodbridge, CT 06525

Select the permission level below that you would like to grant [UIL Web Service Portal](#) for each category.

Item	None	Read Only Access	Full Access	Account Number1	POD ID2
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
▼ All Meter Information					
▼ Energy Meters					
<div></div>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<div></div>	<div></div>
<div></div>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<div></div>	<div></div>

- For the property and for each UI electric and SCG and CNG natural gas meter, select the Full Access radio button.
- For the Account Number field (1), enter the 14-digit account number with no dashes. UI starts with 01, SCG starts with 05, CNG starts with 04.
- For the POD ID field (2), enter the 13-digit POD number with no dashes. The POD ID is located on your bill under "New Charges & Credits"

Energy usage and cost data will be uploaded for up to 12 months, back to the last billing entry date. If no meter billing entries exists, 12 months of data will be uploaded. Data will usually upload overnight on a business day once the meter exchange is accepted by UIL.

Eversource Account Verification

Select Access Permissions to [CT Dept of Environmental Protection](#) for [Eversource Web Services](#).
The following information is required by [Eversource Web Services](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Select the permission level below that you would like to grant [Eversource Web Services](#) for each category.

ad ly cess	Full Access	Is Eversource your service provider? Y/N ¹	ID ²	Description ³	Usage History Load Required? Y/N ⁴
	<input checked="" type="radio"/> a	<input type="text"/> b	<input type="text"/> c	<input type="text"/> d	<input type="text"/> e
	<input type="radio"/>				
	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="51997833074"/>	<input type="text" value="N"/>
	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="51997833074"/>	<input type="text" value="N"/>
	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="3028977056"/>	<input type="text" value="Y"/>

1 Is Eversource your service provider? Y/N: Example: Y: Enter Y if Eversource is your service provider or N if not

- a) Select **Full Access** to allow for automatic transfer
- b) **Is Eversource your service provider?** Y = Yes
- c) **ID** can be Billing Account number (BA), Service Account Number (SA), or Meter Number (MN)
- d) **Description** enter the chosen ID exactly as it appears on your bill
- e) **Usage History Load Required? Y/N** - Historical data will be transferred going back to 1/1/2013

Eversource Account Verification

For **non-Eversource meters** enter the following:

- a) **Full Access** for information access
- b) **N** for a non-Eversource account
- c) **NA** for the ID field
- d) **NA** for Description
- e) **N** for history load data

Select Access Permissions to [CT Dept of Environmental Protection](#) for [Eversource Web Services](#).

The following information is required by [Eversource Web Services](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Select the permission level below that you would like to grant [Eversource Web Services](#) for each category.

Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="3028977056"/>
▼ Water Meters						
Potable: Mixed Indoor/Outdoor Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="n"/>	<input type="text" value="NA"/>	<input type="text" value="NA"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
Recognition	<input type="radio"/>		<input checked="" type="radio"/>			

1 Is Eversource your service provider? Y/N• Example: Y• Enter Y if Eversource is your service provider or N if not

Account Verification

Select Access Permissions to [CT Dept of Environmental Protection](#) for [Eversource Web Services](#).

Checklists

Recognition					
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1 Is Eversource your service provider? Y/N: Example: Y; Enter Y if Eversource is your service provider or N if not
2 ID: Example: BA; Enter "BA" for Billing Account # or "SA" for Service Account # or "MN" for Meter #
3 Description: Example: 12345678901, 12345678902; Enter complete Billing Account #, Service Account #, or Meter #. For Multiple BA, SA, MN, Please enter with delimiter comma (,).
4 Usage History Load Required? Y/N: Example: Y; Enter "Y" if you want Eversource to send Usage History Data to ESPM (Starting from Jan 2013) or 'N' for Not Transferring usage history data

Additional Options:

Item	Yes	No
* Share Forward Allow Eversource Web Services to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input checked="" type="radio"/>	<input type="radio"/>

Apply Selections & Authorize Exchange [Cancel](#)

- Scroll to the bottom of the box to see remaining options
- Select “**Yes**” for Eversource and “**No**” for UIL to the Share Forward option
- Click “**Apply Selections & Authorize Exchange**” button

Finalizing the Exchange

The screenshot shows a web interface for sharing property information. At the top, there are tabs: 'MyPortfolio', 'Sharing' (selected), 'Reporting', and 'Recognition'. The main heading is 'Share Your Property(ies)'. Below it, a sub-heading says 'Select Permissions for Each Contact'. A note states: 'To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.' A 'Sort by:' dropdown is set to 'Property Name'. A table lists contacts with columns for 'Name (ID)', 'No Access', 'Read Only Access', 'Full Access', 'Custom Access', and 'Exchange Data'. The 'Full Access' column for the first contact is circled in red. At the bottom right, there are 'Share Property(ies)' and 'Cancel' buttons.

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

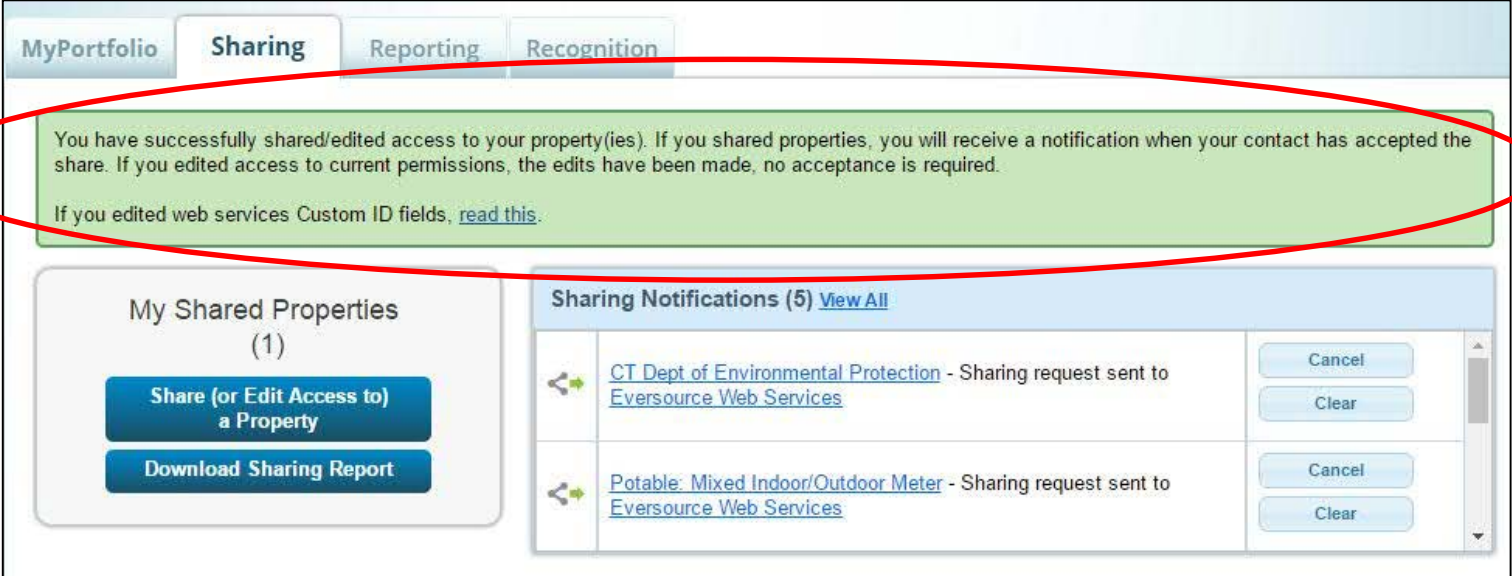
Sort by: Property Name

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
CT Dept of Environmental Protection (5047366)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Eversource Web Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Share Property(ies) [Cancel](#)

- Repeat the verification steps for any other properties on your account
- Click “**Share Property(ies)**” button when finished to submit your request

Confirmation



The screenshot shows the 'MyPortfolio' interface with the 'Sharing' tab selected. A green notification box at the top contains the following text: 'You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required. If you edited web services Custom ID fields, [read this](#).' Below this, on the left, is a section titled 'My Shared Properties (1)' with two buttons: 'Share (or Edit Access to) a Property' and 'Download Sharing Report'. On the right is a section titled 'Sharing Notifications (5) [View All](#)' containing a table of notifications.

Sharing Notifications (5) View All		
	CT Dept of Environmental Protection - Sharing request sent to Eversource Web Services	Cancel Clear
	Potable: Mixed Indoor/Outdoor Meter - Sharing request sent to Eversource Web Services	Cancel Clear

- You will receive the above notification confirming the request went through
- You will receive another notification in one business day confirming or denying that the request was successful

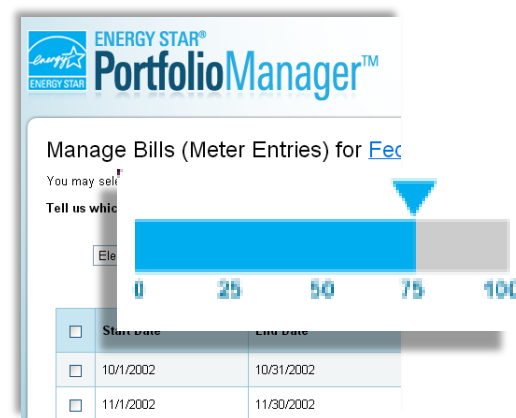
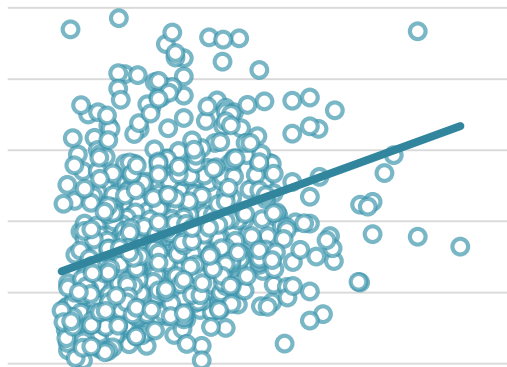
Eversource and UIL Support for data sharing operations

- For questions on data sharing operations with Eversource, email to:
Eversource_ESPM_Support@eversource.com
- For questions on data sharing operations with UIL, email to: Sheri.Borelli@uinet.com

What is getting updated in ENERGY STAR Portfolio Manager?

- On **August 27, 2018**, EPA is releasing updated metrics to the tool as part of its standard process to keep ENERGY STAR metrics as current as possible:
 - 1-100 ENERGY STAR score models (based on CBECS 2012)
 - Bank branches
 - Courthouses
 - Financial offices
 - Hotels
 - Houses of worship
 - K-12 schools
 - Offices
 - Retail, including retail store and warehouse club/supercenter
 - Supermarkets
 - Warehouses, including refrigerated, non-refrigerated, and distribution centers
 - National source energy factor
 - Data center benchmarking options

EPA's 1 – 100 ENERGY STAR scores are based on market data

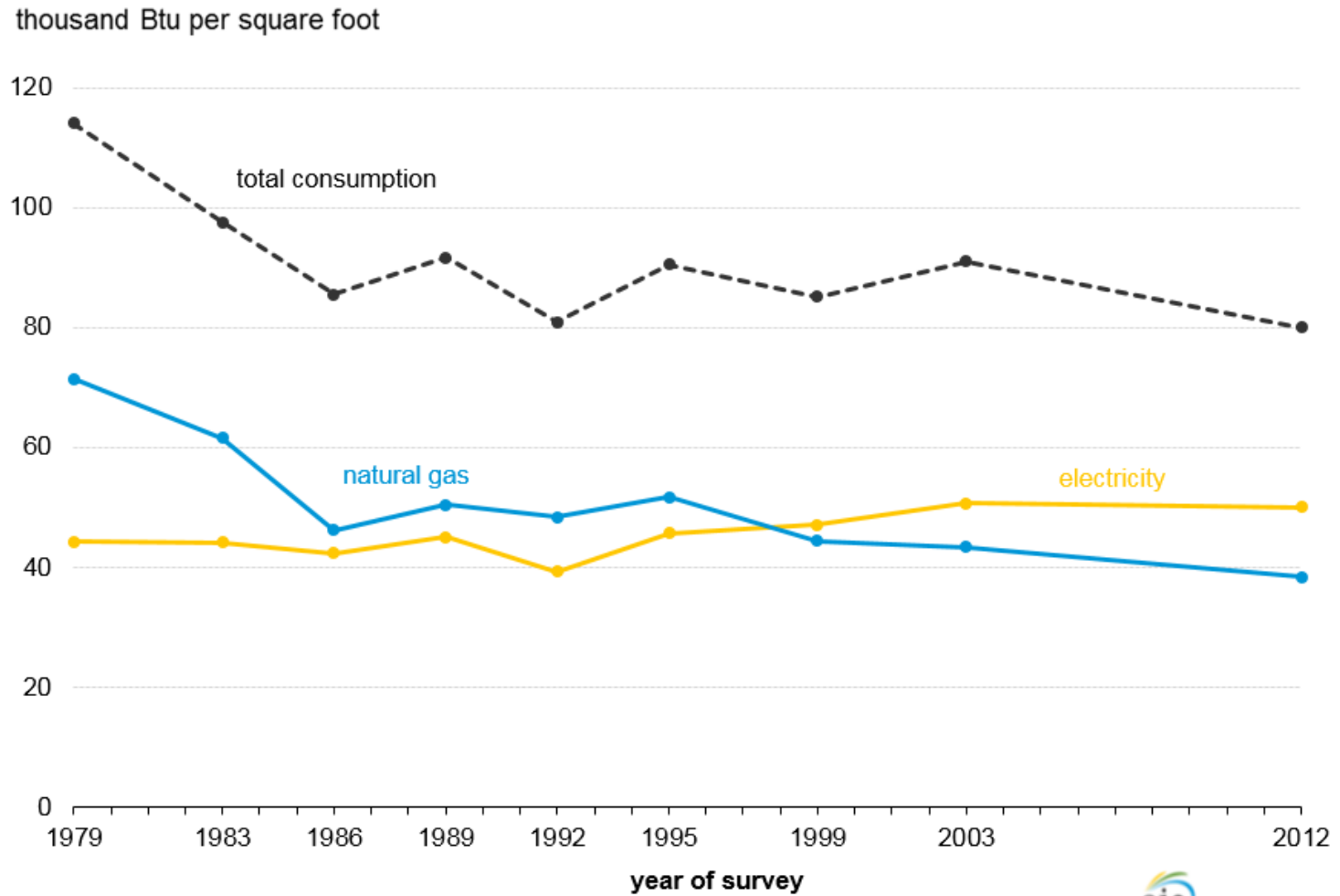


Nationally representative survey
- CBECS gathers data on building characteristics and energy use from thousands of buildings across the U.S.

EPA creates a **statistical model** that correlates the energy data of the property use details to identify the key drivers of energy use, accounting for weather variations

Compares the actual energy data for a building to the modeled estimate to determine where the building ranks relative to its peers on a 1-100 scale

Overall trend in U.S. building energy use (CBECS)

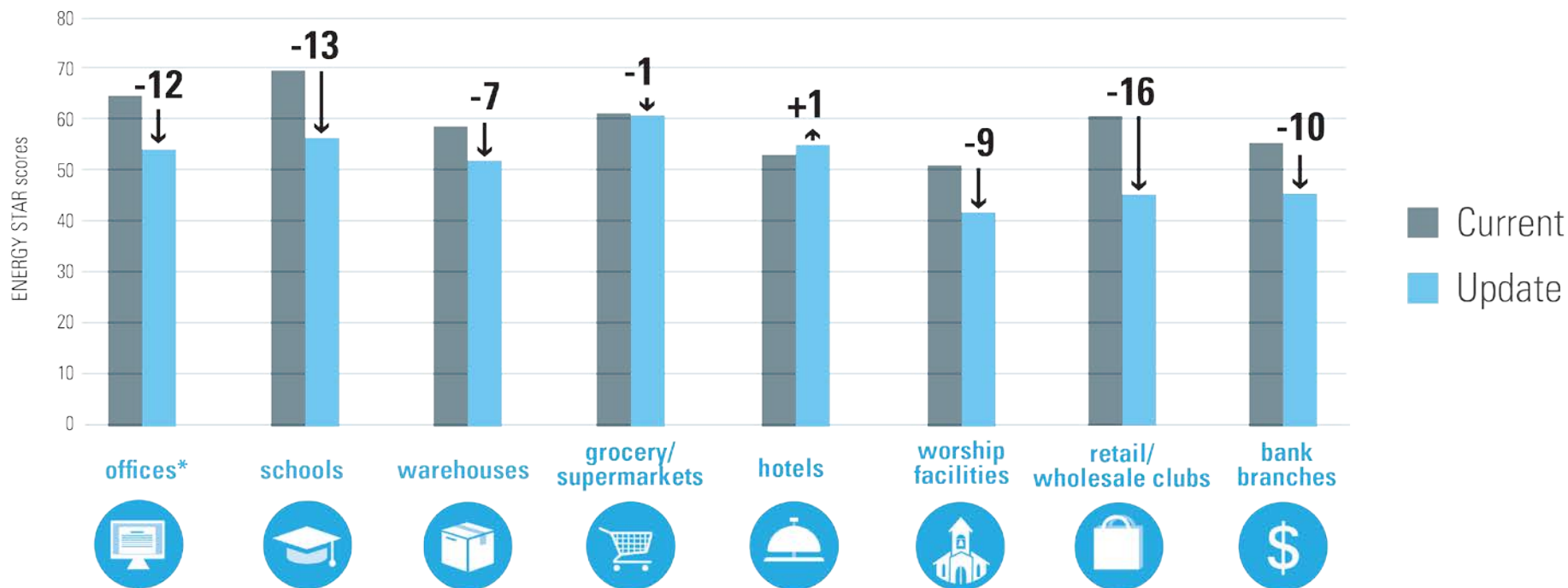


Source: U.S. Energy Information Administration, Commercial Buildings Energy Consumption Survey.



What does this mean for individual buildings?

Because average energy and grid performance is improving, the ENERGY STAR scores and performance metrics of individual buildings will, on average, go down.







*office, financial office, courthouse

These are average score changes for these building types. An individual building's score change is likely to differ from the average change shown above.

Will this impact your historical scores?

- Yes, when EPA updates the methodology, the new calculations will be applied to **all time periods**.
- You'll maintain the ability to compare performance over time.
 - Even if your scores go down, you'll still see your improvement between the baseline and the current periods
 - You'll continue to be able to analyze differences that are a result of your own activities, not EPA's methodology

Metrics Summary			
Metric 	Dec 2014 (Energy Baseline) 	Mar 2017 (Energy Current) 	Change 
ENERGY STAR Score (1-100)	39	48	9.00 (23.10%)
Source EUI (kBtu/ft ²)	294.9	264.4	-30.50 (-10.30%)
Site EUI (kBtu/ft ²)	118.7	95.8	-22.90 (-19.30%)
Energy Cost (\$)	581,581.78	540,588.06	-40993.72 (-7.00%)
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	11.3	9.9	-1.40 (-12.40%)
Water Use (All Water Sources) (kgal)	3,373.9	3,228.1	-145.80 (-4.30%)
Total Waste (Disposed and Diverted) (Tons)	879.99	836.75	-43.24 (-4.90%)

Any other changes in August?

Data center energy estimates

- New option: Estimated data center energy use
 - Designed for smaller data centers, within another property type, and where it is not practical to measure IT Energy
 - If IT energy is not metered, users will have the chance to apply estimates generated by Portfolio Manager
 - Estimate capped at 10% of the building area

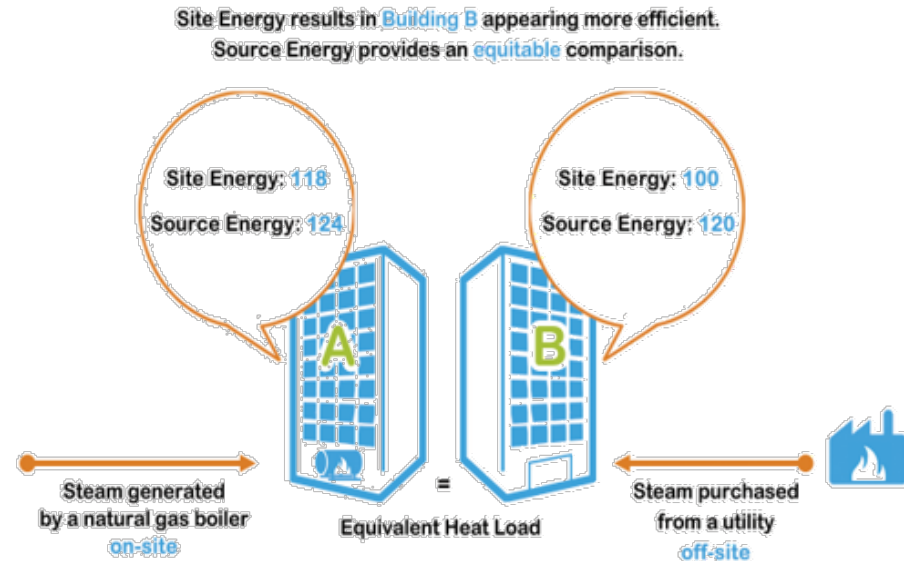
New use details in Portfolio Manager

- Warehouse
 - Percentage of gross floor area used for cold storage (**New in August**)
 - Percent that can be cooled and percent that can be heated (**New in August for refrigerated warehouses**)
- Worship Facilities
 - Gross floor area used for food preparation (**New in August**)
 - Percent that can be cooled and percent that can be heated (**New in August**)
- K-12 Schools
 - Number of workers on main shift
 - Exists now, but will be required in August
- Supermarket
 - Number of open or closed refrigeration/freezer units
 - Exists now, but will be required in August

Any other changes in August?

Update to Source Energy Factor

- Source energy traces the heat and electricity requirements of the building back to the raw fuel input
 - Level playing field for different fuel types
- Portfolio Manager delivers several key performance indicators in source energy:
 - Weather normalized source EUI
 - ENERGY STAR score
- New approach
 - Offsite renewables lower the national average electric source factor. Electricity generated from renewable energy sources has lower raw fuel inputs than electricity generated from fossil fuels.
- Updated electric source factor releasing Aug 26, 2018
 - Dropping from 3.1 to 2.8 (more efficient grid)
 - Will impact ENERGY STAR score & all source energy metrics
 - ENERGY STAR score could increase or decrease depending on a building's fuel-mix ratio
 - Changes based on this update alone will be small in magnitude comparatively



Preparing for the metric updates

- If needed, document pre-update metrics with Portfolio Manager reports
 - “Performance Highlight” Report
 - Portfolio-level, multi-year
 - Statement of Energy Performance
 - Building-level, represents 12-month performance period

The form is titled "ENERGY STAR® Statement of Energy Performance". It features a large "77" representing the ENERGY STAR Score. The form is divided into several sections: "Sample Property" with details like Primary Property Function (Office), Gross Floor Area (50,419 ft²), and Built year (1951); "Property & Contact Information" with address, owner, and contact details; "Energy Consumption and Energy Use Intensity (EUI)" with a table of metrics; and a "Signature & Stamp of Verifying Professional" section.

ENERGY STAR® Statement of Energy Performance

77
ENERGY STAR® Score¹

Sample Property
Primary Property Function: Office
Gross Floor Area (ft²): 50,419
Built: 1951
For Year Ending: July 31, 2014
Date Generated: October 01, 2014

1. The ENERGY STAR score is a 1-100 assessment of a building's energy efficiency as compared with similar buildings nationwide, adjusting for climate and business activity.

Property & Contact Information

Property Address	Property Owner	Primary Contact
Sample Property 123 Main St. Boston, Massachusetts 02134	Property Inc. 123 Early Bird St. Washington, DC 20460 202-999-9876	Jane Doe 123 Early Bird St. Washington, DC 20460 555-123-4567 jane_doe@propertyinc.com

Property ID: 3681885

Energy Consumption and Energy Use Intensity (EUI)

Site EUI	Annual Energy by Fuel	National Median Comparison
75.7 kBtu/ft²	Electric - Grid (kBtu) 2,453,824 (64%)	National Median Site EUI (kBtu/ft²) 103.5
	Natural Gas (kBtu) 1,273,766 (33%)	National Median Source EUI (kBtu/ft²) 247.6
	Propane (kBtu) 91,000 (2%)	% Diff from National Median Source EUI -27%
Source EUI		Annual Emissions
181.2 kBtu/ft²		Greenhouse Gas Emissions (Metric Tons CO₂/year) 311

Signature & Stamp of Verifying Professional
I, _____ (Name) verify that the above information is true and correct to the best of my knowledge.
Signature: _____ Date: _____
Licensed Professional
John Smith
4 Privet Dr
Arlington, VA 22201
703-111-1234
john_smith@energyinspectors.com

Professional Engineer Stamp
(if applicable)

Preparing for the updates

- **Apply for ENERGY STAR certification (policy for 2018 only):**

- If you earned 2017 ENERGY STAR certification for your building, you may apply for 2018 certification using a period ending date of April 30, 2018, or earlier. Applications submitted:
 - **Before July 26, 2018** and which require no significant follow-up or changes, will be guaranteed to be approved and awarded certification using the existing score models.
 - **July 26, 2018 – August 26, 2018** may be evaluated using the updated score models, especially if significant follow-up or changes to the application are required.
 - **After August 26, 2018** will be evaluated using the updated score models.



Preparing for the updates

- Communicate the metric updates to colleagues, clients, stakeholders, etc.

- Download template materials:

www.energystar.gov/scoreupdates

UPDATES TO ENERGY STAR® BUILDING METRICS ARE COMING IN AUGUST 2018

The simple choice for energy efficiency.
ENERGY STAR

March 22, 2018

If you benchmark one or more properties in ENERGY STAR Portfolio Manager®, you'll likely see a change in your buildings' 1-100 ENERGY STAR scores and other source energy metrics after August 26, 2018. That's because EPA is updating performance metrics in Portfolio Manager based on the most recent market data available. This is part of EPA's standard process to keep ENERGY STAR metrics as current as possible, and reflective of current market performance.

How will this impact my ENERGY STAR score?

The 1-100 ENERGY STAR score compares your building's energy performance to that of similar buildings nationwide. The most recent market data available shows an overall improvement in the energy performance of the U.S. building stock in recent years. So when Portfolio Manager metrics are updated this August, ENERGY STAR scores and other performance metrics will, on average, go down.

Exact score changes for specific buildings or portfolios will not be available prior to the August release. Your individual building's ENERGY STAR score may increase or decrease.

Property Type	Average Score Change
offices*	-12
schools	-13
warehouses	-7
grocery/supermarkets	-1
hotels	+1
worship facilities	-9
retail/wholesale clubs	-16
bank branches	-10

*office, financial office, courthouse

Figure 1: Average score changes for common property types

What is the new available market data?

For most types of commercial buildings, the 1-100 ENERGY STAR score is based on the Commercial Buildings Energy Consumption Survey, which is conducted every four years by the U.S. Department of Energy's Energy Information Administration. The latest CBECS data became available in 2016 and is based on the results of the 2012 survey.

When will the changes take effect?

The release date for all updated scores is **August 26, 2018**. Users will see the updated metrics when they login to Portfolio Manager on Monday, August 27. Releasing the updated scores at one time will ensure that mixed-use buildings experience only one change.

How can I learn more and prepare?

Visit www.energystar.gov/scoreupdates for details about the updates, guidance on how to prepare for the updates, and a communication toolkit for sharing this news with your stakeholders. You can also join a webinar or view a recorded webinar at <https://esbuildings.webex.com/> to learn more.

ars, EPA's ENERGY STAR program has been America's resource for saving energystar.gov.

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Updated ENERGY STAR® building metrics are coming

Do you benchmark in Portfolio Manager®? On August 26, 2018, 1-100 ENERGY STAR scores and source energy metrics are changing.

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THANK YOU! QUESTIONS?