

>> PUGET SOUND ENERGY "MYDATA"



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.

1. Add PSE as a Contact

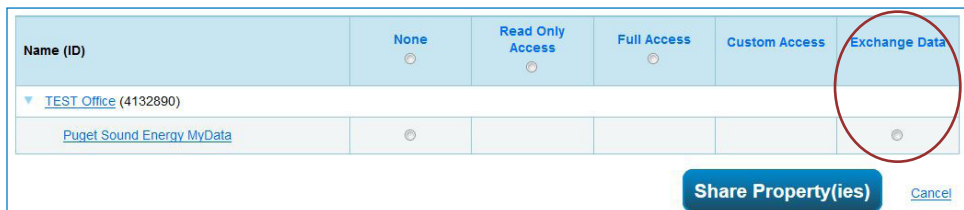
- If you **have not previously added PSE** as a contact, you will need to add them:
 1. Click the **Contacts** link in the upper right hand corner.
 2. Click on **Add Contact**.



3. Enter **ESIOOPERATOR** 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:

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.

- **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.

Please select the permission level you would like to grant [MyData, Puget Sound Energy](#) for [Building](#) for each category. If "None" is selected for all items, [MyData, Puget Sound Energy](#) will not receive any access to this property.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
All Meter Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goals, Improvements, & Checklists	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recognition	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Apply Selections & Authorize Connection](#)

- 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.

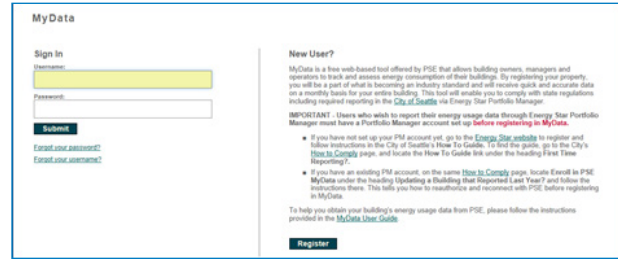
IMPORTANT: Your sharing request should be accepted by PSE in approximately **1 hour**. Do not start the next step until MyData, Puget Sound Energy is listed as having Exchange Data permissions in Portfolio Manager, as shown below.

The screenshot shows the 'Sharing' tab in the MyPortfolio interface. On the left, there is a section for 'My Shared Properties (2)' with a 'Share a Property' button. Below it is an 'Exchanging Data' section with a help icon and text explaining how to connect with other organizations. On the right, there is a 'Sharing Notifications (10)' list showing three notifications: 'New Electric Meter', 'Ocean Vista Offices', and 'Natural Gas', all with 'Share accepted by Puget Sound Energy MyData' and 'Clear' buttons. Below the notifications is another 'My Shared Properties (2)' section with a table of properties. The table has columns for Name, Permissions, and Action. The row for 'MyData, Puget Sound Energy' is circled in red, showing 'Exchange Data' permissions and an 'Action' dropdown menu.

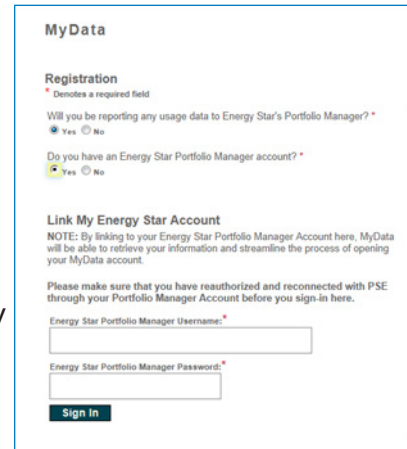
Name	Permissions	Action
Ocean Vista Offices	Exchange Data	
Annual Reporting - City of Seattle	Exchange Data	I want to...
MyData, Puget Sound Energy	Exchange Data	I want to...
Yosai School	Exchange Data	

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.**

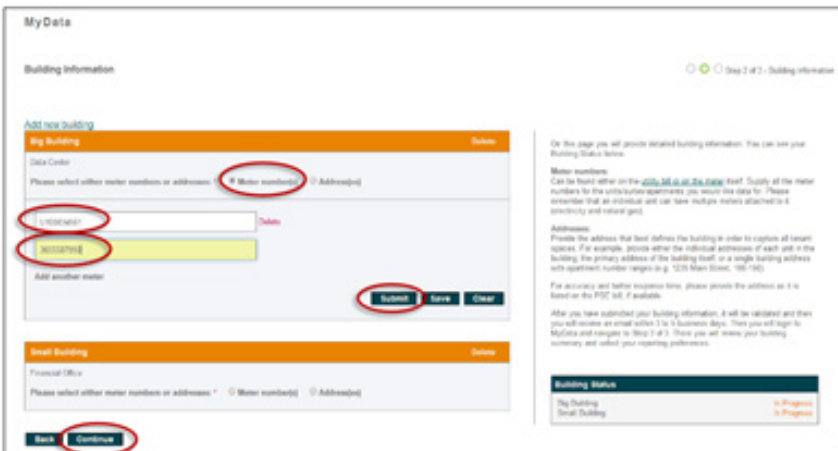


IMPORTANT:

*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 inaccurate accounts.*



- ❑ 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."**



- ❑ 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.*

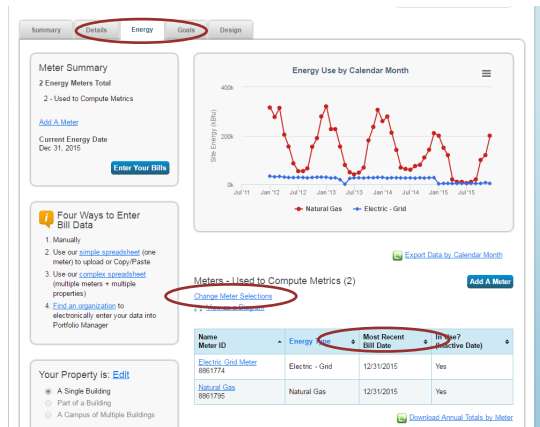
The screenshot shows the 'My Desk' interface for building setup. At the top, it says 'This building has been created and is ready for your review. Please choose your report preferences and complete your request.' The status is 'Release Forms Required'. Below this, there are two main sections: 'Please choose how you prefer to receive data:' with radio buttons for 'Individual Meters' and 'Whole Building' (selected); and 'Reporting Options:' with radio buttons for 'Monthly', 'One Time Only', and 'Post to Energy Star' (selected). A red circle highlights the 'Post to Energy Star' option. Below these options, a red asterisk and icon indicate a requirement: 'Confirm the addresses and meter numbers below accurately represent your building.' There are two tenant entries, 'Tenant A' and 'Tenant B', each with a 'Delete Address' link and a meter number. To the right of each tenant entry, there is a red message: 'We require a release form for this tenant.' Below this message are two links: 'Download blank release form' and 'Upload completed release form', both of which are circled in red. At the bottom left, there is a 'Submit' button.

- 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) for the total energy consumption of this property.”
 3. Click **Apply Selections**.

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for [Test High Use Apartments \(ID 49769\)](#) so that we can provide you with the most accurate metrics possible.

Summary

2

Meters representing the total energy consumption for [Test High Use Apartments \(ID 49769\)](#) (a single building).

1 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 confounding 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"/>	Electric - Grid Meter 8861774	Electric - Grid
<input checked="" type="checkbox"/>	Natural Gas 8861796	Natural Gas

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

These meter(s) account for the total energy consumption for [Test High Use Apartments \(ID 49769\)](#) (a single building).

These meter(s) do not account for the total energy consumption for [Test High Use Apartments \(ID 49769\)](#) (a single building).

Apply Selections

5. Select Permission Levels for Other Web Services Providers

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 **Puget Sound Energy MyData** tab.
- ❑ Select **Apply Selections and Authorize Exchange**.

