



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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First time benchmarking?
Watch the [Introduction to Benchmarking](#) training video for more information on energy benchmarking and reporting requirements.

Tip Watch the [Understand Results and Create Reports](#) training video to learn how to interpret your results and identify opportunities for energy savings.

What is Energy Benchmarking?

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!

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 utility 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 inaccurate, and will not be considered compliant until complete energy consumption is verified and reported.**
- ❑ **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.

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.

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

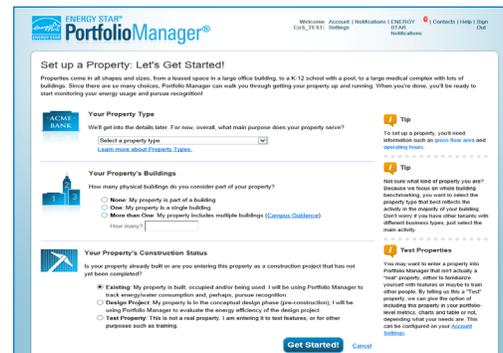
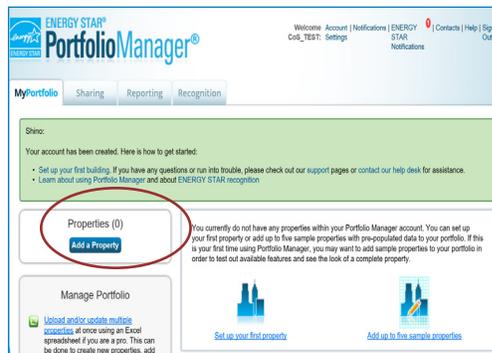
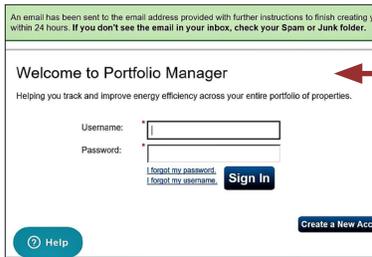
Tip Watch [Creating a Portfolio Manager Account and Entering Data](#) training video for more detailed instructions.

- 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.

Characteristic	Value	Current As Of	Temporary Value
Gross Floor Area	12000 Sq. Ft.	1/01/1992	<input type="checkbox"/>
Weekly Operations Hours	default	01/01/1992	<input type="checkbox"/>
Number of Workers on Main Shift	default	01/01/1992	<input type="checkbox"/>

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.

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.

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.

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 CenTrio 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 12

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

CenTrio Energy (formerly Enwave and Seattle Steam) - See page 16

Email pdlesk@utilitystudio.com
Phone 847-420-6432
Website http://v4.utilitystudio.com/LoginCenTrioSeattle.aspx

Manual Meter Entry

If only a 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 CenTrio could be manually entered.

Manual Meter Entry instructions are in the **Appendix B**.

3A SEATTLE CITY LIGHT DATA EXCHANGE



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 is required for enrollment.

- 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.

The screenshot shows the Energy Star Portfolio Manager interface. At the top right, the text 'Welcome building123: Account Settings | **Contacts** | Help | Sign Out' is visible, with 'Contacts' circled in red. Below this is a navigation bar with tabs for 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. The main content area is divided into two sections. On the left, 'Your Search Criteria' includes input fields for 'Name' (containing 'SCL'), 'Username', and 'Email Address', with a 'Search' button. On the right, a table lists search results with 'Connect' buttons. The entry 'SCL Portfolio_Manager' is circled in red.

Name	Connect
Anthony Scalfani NOT AVAILABLE with NORESKO	Connect
Anthony Scalfani Manager of Project Development with Apollo Solutions Group	Connect
L Bienhoff (SCL Test) NOT AVAILABLE with SCL_Test	Connect
Monica Pedescleaux Asset Management Specialist with General Services Administration	Connect
SCL Portfolio_Manager Seattle City Light with Seattle City Light	Connect
SCL TESTCUST3 TEST APP DEV with SCL TESTCUST3	Connect

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**.

Name	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter 8861774	Electric - Grid	12/31/2015	Yes
Natural Gas	Natural Gas	12/31/2015	Yes

- 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.

Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
1234_broadway_st_0	Electric - Grid		kWh (thousand)	09/25/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>

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 Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for [85 Unit WS Building](#) so that we can provide you with the most accurate metrics possible.

Summary

2

Meters representing the total energy consumption for [85 Unit WS 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

Energy Meters

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

	Name Meter ID	Type
<input checked="" type="checkbox"/>	Natural Gas 25794037	Natural Gas
<input checked="" type="checkbox"/>	Electric Grid Meter 25794064	Electric - Grid

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

These meter(s) account for the total energy consumption for [85 Unit WS Building](#) (a single building).

These meter(s) do not account for the total energy consumption for [85 Unit WS Building](#) (a single building).

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**.

Welcome TOSCANO: Account Settings | Contacts | Help | Sign Out

ENERGY STAR®
PortfolioManager®

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

Share Additional Meters with Web Services Provider

You have successfully created additional meters for your property. We notice that your property is shared with companies that exchange data directly through Portfolio Manager web services. If you want these companies to be able to access/your new meters, you must share these meters directly with them. If you do not wish to grant access to this meter, please select "none" as the permissions level and the meter(s) will not be shared at this time. To share in the future you will need to select "Edit Contacts Permissions" from the Sharing table on the Summary tab for your property.

Select the permission levels you would like to grant each web services provider below:

← Puget Sound Energy MyData

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

Meter Name	None	Read Only	Full Access	Meter Number ¹
907_warren_ave_n_tosciano_01202017_ppi6793934148	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

¹ Meter Number: Example: 0123456789. The 9 or 10 character meter number for which you would like to receive consumption - usage data. This may be alphanumeric, and it may contain leading zeroes. - Between 5 and 10 Characters

Apply Selections and Authorize Exchange Cancel

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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**.

1 Select Properties

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

One Property - Select Property -

2 Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

City of Seattle Annual Reporting (SEATTLE.GOV)
SCL Portfolio Manager (SCL_PORTFOLIO_MANAGER)

? Help To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.

- 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.

Select Access Permissions to 1234 Broadway St 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 how to complete this information, please contact them directly.

PremiseID: * Example: 1234567890

Parent Premise ID associated with the property and is provided by SCL Portfolio Manager or SCL Representative.; 1 - 10 Characters [More 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	PremiseID ¹
Property Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
▼ All Meter Information				
▼ Energy Meters				
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

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. *Note, there is a two month delay in consumption meter uploads due to SCL bi-monthly billing cycles and the aggregate process for estimating monthly consumption. For example, December monthly data is uploaded the following March.*



3B PUGET SOUND ENERGY

PSE CUSTOMERS: PSE is transitioning from [MyData](#) (current software platform to enroll in automated data exchange for reporting of natural gas consumption) to a new software tool EnergyCAP®.

As of Aug. 17, 2022 MyData will sunset and be permanently replaced by EnergyCAP® which will launch on August 23rd, 2022. From Aug. 17 to 22, you will not be able to log in to your existing account MyData account or register for a new account, as PSE will be implementing the data migration.

For any data needs, or assistance in setting up a new EnergyCAP account, contact PSE at energycap@pse.com or call (425- 424-6486).

Please note: Updates to Seattle Energy Benchmarking help guides will be forthcoming after PSE launches EnergyCAP®.

3C CENTRIO ENERGY (STEAM) DATA EXCHANGE



Phone (847) 420-6432
Website <http://v4.utilitystudio.com/LoginCentrioSeattle.aspx>
Email pdlesk@utilitystudio.com

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

- Log in to your online Centrio Seattle/UtilityStudio account and complete the Centrio Seattle Authorization Agreement, in the “ENERGY STAR Reporting” link. If you do not know your username and password for your account, or if you have any questions, please contact Paula Lesk at Centrio, at 847-420-6432, or pdlesk@utilitystudio.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 Centrio 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 Centrio 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 Centrio Seattle. Reporting will begin for your facility by the 15th day of the next billing month. Centrio 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/ft ²)	95.3	100.6	5.3(5.6%)
Site EUI (kBtu/ft ²)	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 CO ₂ e)	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:

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: * Ending

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.

ENERGY STAR® Statement of Energy Performance

LEARN MORE AT energystar.gov

84
ENERGY STAR® Score¹

Ocean Vista Offices

Primary Property Function: Office
Gross Floor Area (ft²): 50,000
Built: 1999

For Year Ending: December 31, 2012
Date Generated: July 23, 2013

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.

Primary Contact
Nicole Ballinger
123 1st Ave.
Seattle, WA 98124
000-000-0000
nicole.ballinger@seattle.gov

Energy Consumption and Energy Use Intensity (EUI)

	Annual Energy by Fuel	National Median Comparison
Site EUI 42.5 kBtu/ft ²	Electric - Grid (kBtu) 2,125,676 (100%)	National Median Site EUI (kBtu/ft ²) 69.1
Source EUI 133.5 kBtu/ft ²		National Median Source EUI (kBtu/ft ²) 216.9
		% Diff from National Median Source EUI -38%
		Annual Emissions
		Emissions (MtCO ₂ e/year) 233

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.

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

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.

ENERGY STAR Portfolio Manager

Welcome NICOLEBALL | Account Settings | **Contacts** | Help | Sign Out

MyPortfolio | Sharing | Planning | Reporting | Recognition

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:

Username:

Email Address:

City of Seattle Annual Reporting

City of Seattle Energy Benchmarking Ordinance with City of Seattle Annual Reporting

Phone Number

Energy Management Agency Supervisor with Seattle City Light

Page 1 of 1 | 1 - 2 of 2

- 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.

ENERGY STAR Portfolio Manager

Welcome NICOLEBALL | Account Settings | Contacts | Help | Sign Out

Send a Connection Request to City of Seattle Annual Reporting to Begin Exchanging Data

City of Seattle Annual Reporting 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 City of Seattle Annual Reporting. Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Contact Name: Example: John Smith
First and last name of the contact associated with this account. - Characters

Contact Email Address: Example: jsmith@youremail.com
Please provide an email, so that we may contact you with questions or program updates. - Characters

Contact Phone: Example: (206) 727-8484
Please provide a phone number (including area code), so that we may contact you with questions. - Characters

Terms of Use: I understand, on behalf of Customer, that the EPA requires information about Customer's facility (which Customer will provide directly to the EPA). Customer's monthly utility billing data, and other data as may be required by EPA's ENERGY STAR Portfolio Manager application in order to calculate Customer's benchmarking data and rating. This information will help Customer track the energy usage and efficiency of its facilities. I authorize, on behalf of Customer, the annual reporting of Customer's energy consumption data, building square footage, and other characteristics as may be required to fulfill the requirements of Section 22.920 of the Seattle Municipal Code and Director's Rule DR 6-2011. I also authorize, on behalf of Customer, the City of Seattle to electronically transfer such data from the EPA's ENERGY STAR Portfolio Manager application. This data transfer is at the request and on behalf of Customer and as such, Customer agrees to release and hold harmless the City of Seattle from any liability, claims, demands, causes of action, damages or expenses resulting from any release of information or data from the EPA's ENERGY STAR Portfolio Manager application pursuant to this authorization. I understand that the City of Seattle will not publicly post information about the energy performance of individual buildings. Any questions the City receives related to a building's energy performance will be referred to the building owner. In addition, to respect concerns for the disclosure of energy consumption information related to any single individual or business process, all energy data reported to the City of Seattle will be aggregated across an entire building or sub-building - it will not include individual meter readings, or any information related to the operational characteristics of a building, such as hours of use. However, under Washington State Law (reference RCW Chapter 42.56, the Public Records Act) all records received or created by the City of Seattle are considered public records. Public records include annual energy consumption reports as required under Seattle Municipal Code SMC-22.920. The Public Records Act (PRA) requires that public records must be promptly disclosed by the City upon request unless the PRA or other statute specifically exempts records from disclosure. While it is not a legal obligation, the City may exercise its discretion to provide notification of a public records request to the subject of the records, and allow a reasonable amount of time for the subject of the records to pursue a court injunction preventing release.

Agreement: I agree to my provider's (City of Seattle Annual Reporting) Terms of Use.

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.

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ ID49690: TEST BUILDING 2 (3620234)					
Annual Reporting, City of Seattle	<input type="radio"/>				<input checked="" type="radio"/>
▼ ID49691: TEST BUILDING 3 (3620235)					
Annual Reporting, City of Seattle	<input type="radio"/>				<input checked="" type="radio"/>

- ❑ 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**

Select Data Exchange Access Permissions to [ID49690: TEST BUILDING 2](#) for [Annual Reporting, City of Seattle](#).

[Annual Reporting, City of Seattle](#) requires the following information in order to provide services to your property(ies). If you have any questions about how to complete this information, please contact [Annual Reporting, City of Seattle](#).

City of Seattle Energy Benchmarking Building ID: Example: 1147

Building identifier provided by the City of Seattle Energy Benchmarking program (NOT your Portfolio Manager Building ID). If you do not know your City of Seattle Building ID, contact (206) 727-8484 or click on "More Information" below.; Between 1 and 5 Characters [More Information](#)

Please select the permission level you would like to grant [Annual Reporting, City of Seattle](#) for [ID49690: TEST BUILDING 2](#) for each category:

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
▼ All Meter Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Electric Grid Meter	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

(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.

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ ID49690: TEST BUILDING 2 (3620234)					
Annual Reporting, City of Seattle	<input type="radio"/>				<input checked="" type="radio"/> Edit
▼ ID49691: TEST BUILDING 3 (3620235)					
Annual Reporting, City of Seattle	<input type="radio"/>				<input checked="" type="radio"/> Edit

- ❑ 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

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

Data Center

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

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

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

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

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

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

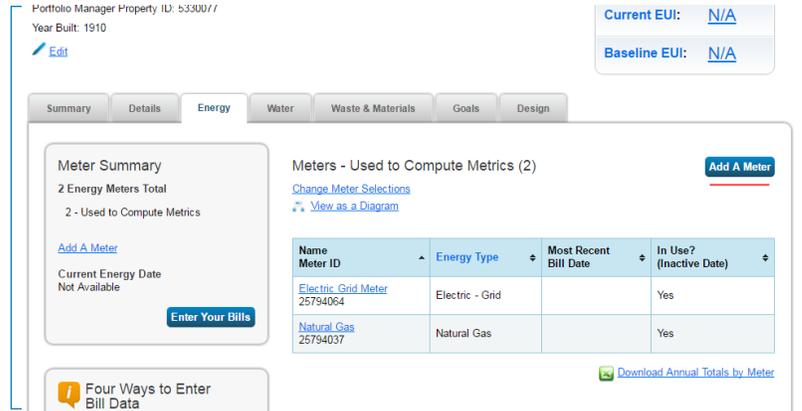
_____ Gross Floor Area
_____ Exterior Entrance to the Public
_____ Weekly Operating Hours
_____ Number of Workers on Main Shift
_____ Number of Computers
_____ Number of Cash Registers
_____ No. of Open or Closed Refrigeration/Freezer Units
_____ Number of Walk-in Refrigeration/Freezer Units
_____ Percent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

Appendix B

Entering Utility Data Manually into Portfolio Manager

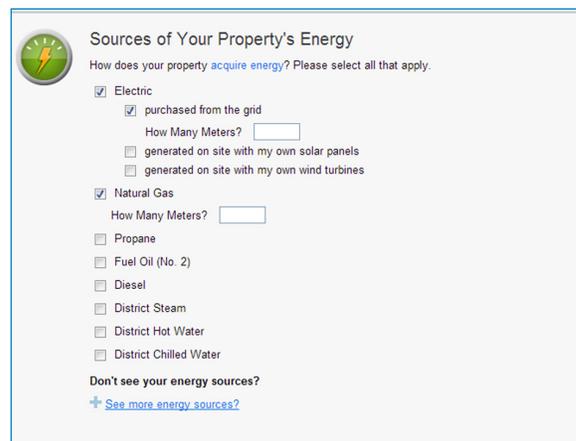
If you only have a few meters serving your building and prefer to hand enter the data, this option may work. We don't recommend it for multifamily or commercial with many tenants, as you will need get permission from all tenants to collect their bills.

- ❑ 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.

About Your Meters for Ocean Vista Offices

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.

1 Energy Meter for Ocean Vista Offices (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"/>	Natural Gas	Natural Gas		therms		<input checked="" type="checkbox"/>		<input type="checkbox"/>

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

- Select the **correct unit** for the fuel type:
 - Seattle City Light Electric = kWh
 - Puget Sound Energy Natural Gas = Therms
 - 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**.

Electric Grid Meter [Edit](#)

<input type="checkbox"/>	Start Date	End Date	Usage	Cost	Estimation	Green Power
<input type="checkbox"/>	1/1/2012	2/1/2012	2500 kWh (thousand Watt-hours)	250	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	02/02/2012	03/01/2012	3000 kWh (thousand Watt-hours)	\$ 300	<input type="checkbox"/>	<input type="checkbox"/>

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

You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#).
 No file chosen

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>

CenTrio Seattle

Email pdlesk@utilitystudio.com

Phone 847-420-6432 or (206) 623-6366

Website <http://v4.utilitystudio.com/LoginCenTrioSeattle.aspx>

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: *

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* <input type="text" value="6,000"/> Sq. Ft. ▾	<input type="text" value="1/1/2017"/> 📅	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2017"/> 📅	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2017"/> 📅	<input type="checkbox"/>
★ Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2017"/> 📅	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text" value="1/1/2017"/> 📅	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text" value="1/1/2017"/> 📅	<input type="checkbox"/>

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.

The screenshot shows a software interface with a top navigation bar containing tabs: Summary, Details (active), Energy, Water, Waste & Materials, Goals, and Design. On the left, there are two panels: 'Basic Information' and 'Unique Identifiers (IDs)'. The main area is titled 'Property Uses and Use Details' and contains a table with columns: Name, Property Use Type, Gross Floor Area, and Action. A dropdown menu is open for the 'Office Use' row, showing options: 'I want to...', 'Update with New Information', 'View Update History', 'Correct Mistakes' (highlighted), and 'Delete use'. Red arrows in the table point to 'default value' text in the 'Value' column for 'Weekly Operating Hours', 'Number of Workers on Main Shift', 'Number of Computers', 'Percent That Can Be Heated', and 'Percent That Can Be Cooled'. A blue 'Edit' button is visible in the bottom right of the table area.

Name	Property Use Type	Gross Floor Area	Action
▶ Retail Store Use	Retail Store	10,000 ft ²	I want to...
▼ Office Use	Office	6,000 ft ²	I want to...
Value		Current	
★ Gross Floor Area	6000 ft ²	01/01/2017	Correct Mistakes
★ Weekly Operating Hours	65 (default value)	01/01/2017	No
★ Number of Workers on Main Shift	13.8 (default value)	01/01/2017	No
★ Number of Computers	12 (default value)	01/01/2017	No
Percent That Can Be Heated	50 % or more (default value)	01/01/2017	No
★ Percent That Can Be Cooled	50 % or more (default value)	01/01/2017	No
★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.			

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

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	6,000 <input type="text"/> Sq. Ft. <input type="text"/>	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

★ Weekly Operating Hours

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	65 <input type="text"/> <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

★ Number of Workers on Main Shift

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	13.8 <input type="text"/> <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

★ Number of Computers

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	12 <input type="text"/> <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

Percent That Can Be Heated

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	50 % or more <input type="text"/> <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

★ Percent That Can Be Cooled

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	50 % or more <input type="text"/> <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	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

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	6,000 <input type="text"/> Sq. Ft. <input type="text"/>	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

★ Weekly Operating Hours

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	65 <input type="text"/> 	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

★ Number of Workers on Main Shift

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	12 <input type="text"/> 	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

★ Number of Computers

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	12 <input type="text"/> 	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

Percent That Can Be Heated

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	50 % or more <input type="text"/> 	<input type="checkbox"/>	City of Seattle	12/20/2018

 Delete Selected Entries

★ Percent That Can Be Cooled

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017  (to present)	50 % or more <input type="text"/> 	<input type="checkbox"/>	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.

Congratulations! You have successfully created your property.

Next, you can:

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

TEST APARTMENTS

123 TEST AVE SW, SEATTLE, WA 98146 | [Map It](#)

Portfolio Manager Property ID: 6618729

Year Built: 2017

[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**EnergyWaterWaste & MaterialsGoalsDesign

Basic Information

Construction Status:
Existing property that is one single building

! Property GFA - Self-Reported:
50,000 Sq. Ft.

Occupancy:
100%

[Edit](#)

Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Multifamily Housing	40,000 ft ²	I want to... <input type="text"/>
		! Property GFA (Buildings): 40,000 (used to calculate EUI)	
		Property GFA (Parking): 0	

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".

The screenshot shows a software interface with several tabs: Summary, Details (active), Energy, Water, Waste & Materials, Goals, and Design. On the left, there is a 'Basic Information' panel with fields for Construction Status (Existing property that is one single building), Property GFA - Self-Reported (50,000 Sq. Ft.), and Occupancy (100%). An 'Edit' button is present. The main area is titled 'Property Uses and Use Details' and contains a 'View as Diagram' link and a dropdown menu labeled 'Add Another Type of Use', which is circled in red. Below this is a table with columns: Name, Property Use Type, Gross Floor Area, and Action. The table lists 'Building Use' with 'Multifamily Housing' and a Gross Floor Area of 40,000 ft². Below the table, there are summary statistics: 'Property GFA (Buildings): 40,000 (used to calculate EUJ)' and 'Property GFA (Parking): 0'.

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.

★ Gross Floor Area

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017 (to present)	10,000 <input type="text"/> Sq. Ft. <input type="text"/>	<input type="checkbox"/>	City of Seattle	11/16/2018

✖ Delete Selected Entries

★ Weekly Operating Hours

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017 (to present)	65 <input type="text"/>	<input type="checkbox"/>	City of Seattle	11/16/2018

✖ Delete Selected Entries

★ Number of Workers on Main Shift

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017 (to present)	10 <input type="text"/>	<input type="checkbox"/>	City of Seattle	11/16/2018

✖ Delete Selected Entries

★ Number of Open or Closed Refrigeration/Freezer Units

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2017 (to present)	0 <input type="text"/>	<input type="checkbox"/>	City of Seattle	11/16/2018

✖ Delete Selected Entries

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.

The screenshot shows the 'Property Uses and Use Details' section of the Energy Star software. On the left, the 'Basic Information' panel shows 'Property GFA - Self-Reported: 50,000 Sq. Ft.' circled in red. The main table lists three uses: Building Use (40,000 ft²), Parking Use (20,000 ft²), and Retail Store Use (10,000 ft²). Below the table, a summary row shows 'Property GFA (Buildings): 50,000 (use 1 to calculate EUI)' circled in red, and 'Property GFA (Parking): 20,000'.

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Multifamily Housing	40,000 ft ²	I want to... ▼
▶ Parking Use	Parking	20,000 ft ²	I want to... ▼
▶ Retail Store Use	Retail Store	10,000 ft ²	I want to... ▼
Property GFA (Buildings):		50,000 (use 1 to calculate EUI)	
Property GFA (Parking):		20,000	

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.

The screenshot shows the 'Details' tab of the Energy Star Portfolio Manager interface. On the left, the 'Basic Information' section displays 'Construction Status: Test property that is one single building', 'Property GFA - Self-Reported: 100,000 Sq. Ft.', and 'Occupancy: 95%'. An 'Edit' button is visible. On the right, the 'Property Uses and Use Details' section includes a 'View as Diagram' link, a dropdown menu for 'Add Another Type of Use', and an 'Add' button. Below this is a table with the following data:

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft ²	I want to...
▶ Parking Use	Parking	10,000 ft ²	I want to...
Property GFA (Buildings):		100,000 (used to calculate EUI)	
Property GFA (Parking):		10,000	

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 <i>(Information provided by Seattle City Light)</i>	
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

My Contacts [Search for new 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](#)

All	Name	Organization
A	City of Seattle Annual Reporting (SEATTLE.GOV) <small>Connected</small> City of Seattle Energy Benchmarking Ordinance	City of Seattle Annual Reporting
M	Puget Sound Energy MyData (ESIOPERATOR) <small>Connected</small> ESIOPERATOR (PSE)	Puget Sound Energy

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.

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

Anthony Sclafani Not Available with NORESKO	Connect
Anthony Sclafani Manager of Project Development with Apollo Solutions Group	Connect
SCL Portfolio_Manager Seattle City Light with Seattle City Light	Connect
SCL TESTCUST3 TEST APP DEV with SCL TESTCUST3	Connect
Vincent Sclafani Service Department Manager with Competition Subaru	Connect
Vincent Sclafani Service Manager with Competition Subaru of Smithtown	Connect

Page 1 of 1 50

1 - 6 of 6

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

The screenshot shows a web browser window displaying the 'Send a Connection Request to SCL Portfolio Manager to Begin Exchanging Data' form. The form contains the following elements:

- PM User Name:** A text input field with a placeholder 'Example: PM_USER1' and a note: 'This is the user name used to sign in to Portfolio Manager and is case-sensitive. 1 - 50 Characters [More Information](#)'.
- Terms of Use:** A link to 'http://www.seattle.gov/light/accounts/energyusage/docs/abs_tcs.pdf'.
- Agreement:** A checkbox labeled 'I agree to my provider's (SCL Portfolio Manager) Terms of Use.'.
- Buttons:** A blue 'Send Connection Request' button and a grey 'Cancel' button.

At the bottom of the form, there are social media links for 'Follow Us' (Twitter, Facebook, YouTube, LinkedIn) and a footer with links for 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

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.

The screenshot shows the MyPortfolio dashboard with tabs for Sharing, Reporting, and Recognition. On the left, there are sections for 'Properties (1)' with an 'Add a Property' button, a 'Source EUI Trend (kBtu/ft²)' chart, and a 'Manage Portfolio' section. The main area features a 'Portfolio Manager Metric Updates' message, a 'Dashboard' search bar, and a table of properties. The table has columns for Name, Energy Current Date, ENERGY STAR Score, Site EUI (kBtu/ft²), and Source EUI (kBtu/ft²). The first row is for 'TEST APARTMENTS' with ID 6618729, which is circled in red. Navigation buttons like 'First', 'Previous', 'Page 1 of 1', 'Next', 'Last', and '100' are visible at the bottom of the table.

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

The screenshot shows the 'TEST APARTMENTS' property page in the Energy tab. It includes property details like address (123 TEST AVE SW, SEATTLE, WA 98146) and ID (6618729). There are buttons for 'Map It', 'Edit', and 'Add A Meter' (circled in red). A 'Weather-Normalized Source EUI (kBtu/ft²)' box shows 'Current EUI: N/A' and 'Baseline EUI: N/A'. Below are tabs for Summary, Details, Energy, Water, Waste & Materials, Goals, and Design. The 'Energy' tab is active, showing a 'Meter Summary' with '0 Energy Meters Total' and an 'Add A Meter' link. A 'Meters - Used to Compute Metrics (0)' section also has an 'Add A Meter' button (circled in red) and a 'View as a Diagram' link. A red warning icon indicates that no energy meters are entered, and provides instructions on how to add them, including a link to 'How to get Utility Data into Portfolio Manager'.

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!

Get Started Setting Up Meters for TEST APARTMENTS

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill 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



Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

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



ENERGY STAR® PortfolioManager®

[Welcome](#) | [Account](#) | [Notifications](#) | [ENERGY STAR](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
 CoS_TEST: [Settings](#) | [Notifications](#)

About Your Meters for TEST APARTMENTS

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.

1 Energy Meter for TEST APARTMENTS (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"/>	1234_5th_ave_ne_sam mpleapts_11092017p pi3744506912	Electric - Grid		kWh (thousand Watt-hours)	1/1/2009	<input checked="" type="checkbox"/>		<input type="checkbox"/>

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

Back
Create Meters
Cancel

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 <i>(Information provided by Seattle City Light)</i>	
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).

Energy Meters

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

<input type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	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).

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

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.

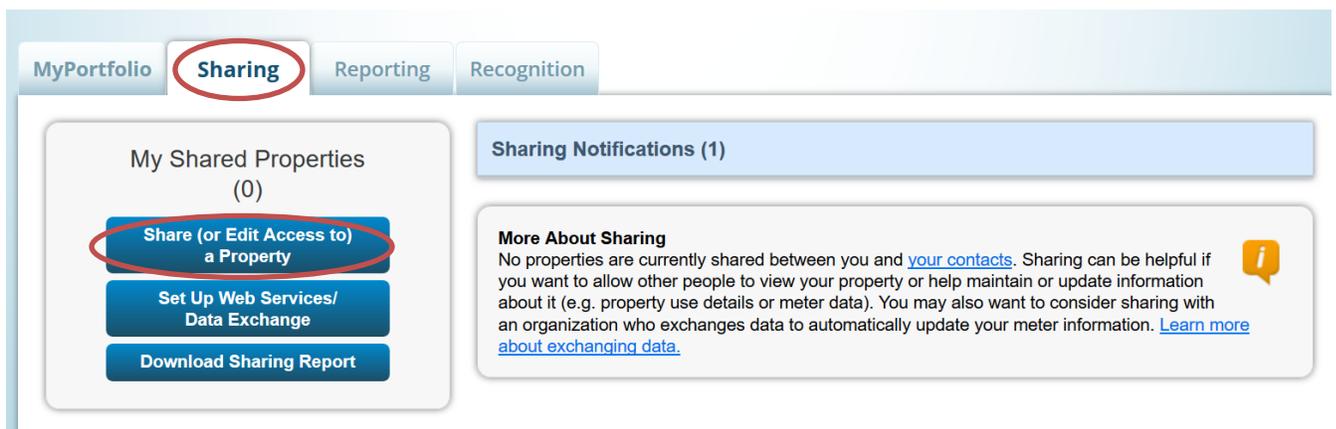
>On the **Share Additional Meters with Web Services Provider** page, select “None” on the **Puget Sound Energy MyData** tab.

>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.



Select Properties

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

One Property Sample Office (US)



Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

Benchmarking 101 Workshop (Benchmarking101)
City of Seattle Annual Reporting (SEATTLE.GOV)
SCL Portfolio Manager (SCL_PORTFOLIO_MANAGER)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.



Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

- * **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).
- Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

[Continue](#) [Cancel](#)

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

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:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Sample Office (US) (6246487)					
SCL Portfolio Manager	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/> ←

Share Property(ies)

[Cancel](#)

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 <i>(Information provided by Seattle City Light)</i>	
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 how to complete this information, please contact them directly.

PremiseID: Example: 1234567890
 Parent Premise ID associated with the property and is provided by SCL Portfolio Manager or SCL Representative.; 1 - 10 Characters [More 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	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
▼ All Meter Information				
▼ Energy Meters				
1234_5th_ave_ne_sampleapts_11092017ppi3744506912	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="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	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Recognition	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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

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

Sort by: Property Name ▾

Name (ID)	No Access <input type="radio"/>	Read Only Access <input type="radio"/>	Full Access <input type="radio"/>	Custom Access	Exchange Data
▼ Sample Office (US) (6246487)					
SCL Portfolio_Manager	<input type="radio"/>				<input type="radio"/>

Share Property(ies) [Cancel](#)

.. 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:

 [Export Data by Calendar Month](#)

Meters - Used to Compute Metrics (1)

Add A Meter

[Change Meter Selections](#)

 [View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
41_dravus_st_41dravusapts_10302018ppi564580525250577533	Electric - Grid	09/30/2018	Yes

 [Download Annual Totals by Meter](#)

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.)

<input type="checkbox"/>	5/1/2017	5/31/2017	23,587.7	2,106.93	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	6/1/2017	6/30/2017	22,994.08	2,056.12	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	7/1/2017	7/31/2017	24,884.02	2,239.90	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	8/1/2017	8/31/2017	24,655.42	2,208.97	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	9/1/2017	9/30/2017	22,936.97	2,012.92	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	10/1/2017	10/31/2017	24,925.37	2,179.30	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	11/1/2017	11/30/2017	27,522.35	2,384.99	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	12/1/2017	12/31/2017	29,100.35	2,563.06	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	1/1/2018	1/31/2018	32,014.22	3,011.43	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	2/1/2018	2/28/2018	28,905.62	2,730.40	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	3/1/2018	3/31/2018	27,304.97	2,555.25	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	4/1/2018	4/30/2018	25,773.05	2,410.27	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	5/1/2018	5/31/2018	21,052.55	1,964.90	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	6/1/2018	6/30/2018	20,464.22	1,911.50	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	7/1/2018	7/31/2018	22,209.5	2,074.82	<input type="checkbox"/>	<input type="checkbox"/>			12/5/2018 SCL Portfolio Manager
<input type="checkbox"/>	8/1/2018	8/31/2018	22,492.37	2,091.22	<input type="checkbox"/>	<input type="checkbox"/>			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	<i>(Carefully choose your Userid. We strongly discourage changes in Userids, unless absolutely necessary.)</i>				
Building Name	Primary Address		Zip		
Alternate Address(es)	Example: Side or rear entrance with alternate street address.				
Recent Construction?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Is there more than one electric utility account associated w/building?	Yes <input type="checkbox"/> No** <input type="checkbox"/>	<i>(If No, Account Holder's signature required, below.)</i>	
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 <input type="checkbox"/>			Tel () - x	
Mailing Address	City	State	Zip		
Email					
Account Holder** <i>(Required, if there is only one electric utility account associated w/building.)</i>	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 <input type="checkbox"/> or Authorized Agent <input type="checkbox"/>	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.