3B PUGET SOUND ENERGY DATA EXCHANGE

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Puget Sound Energy (PSE) CUSTOMERS: These instructions will show you how to enroll in PSE's EnergyCAP® tool to obtain automated, ongoing uploads to Portfolio Manager for your building's natural gas consumption data.

NOTE Before you get started it is advised to identify the number of gas meters serving the whole building. Buildings with one or two individual tenants with gas meters will need to coordinate with account holders to gather additional information and complete the required authorization process. If the building being benchmarked has three or more individual gas meters with separate PSE account holders, you can create an Aggregate Meter in EnergyCAP® (*see guidance on Page 15*). Aggregate meters in EnergyCAP® don't require tenant authorization but the information listed below is helpful to record to confirm benchmarking accuracy.

Information required when there are 1-2 PSE tenant meters in your building:
1. Meter numbers
2. Tenant business name
3. Tenant service address
4. Account numbers associated with the PSE bill
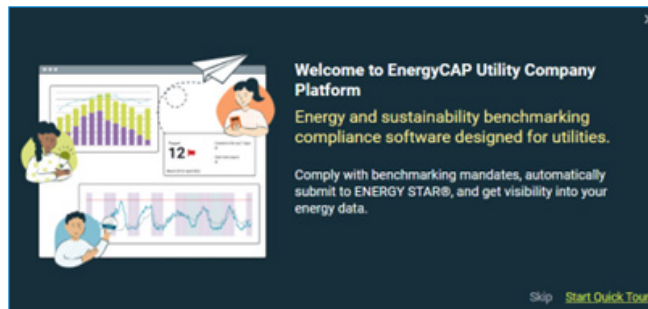
1. Create a New PSE EnergyCAP Account

☐ **Visit** https://forms.EnergyCAP.com/pse/

☐ **Enter** new **user information** for your organization.

> *NOTE If your organization already has a PSE EnergyCAP® account for automated uploads to ENERGY STAR Portfolio Manager you do not need to create a new account.*
>
> **1.** If **you are the account holder of an existing PSE EnergyCAP® account** for your organization, the building must be added to that existing account. **Skip to "Add a Building in EnergyCAP®".**
>
> **2.** If **you are not the account holder for your organization**, the **primary** PSE EnergyCAP **account holder** may **add y**ou **as an authorized user** to complete the enrollment process for the building you are benchmarking. See PSE **guidance on adding an authorized user** to EnergyCAP® accounts.

Register Organization

Submit the following form to register your organization with Puget Sound Energy (PSE) to access EnergyCAP.

Full name

Your organization

Title at your organization (optional)

Email

Phone

Are you the primary account holder or a third party representative?
Primary Account Holder

Name as it appears on PSE bill

Account number(s)

What will you be using this for?
Energy Analysis

Additional details (optional)

Contact Puget Sound Energy for questions about this form or to submit supporting documents.

Register

☐ The following **information is requested when registering** as a new user: Name, Organization, Email, Phone, Relationship to PSE Account Holder.

☐ The registration will ask you to **specify** if you are using EnergyCAP for 'Energy Analysis', 'Reporting to ENERGY STAR Portfolio Manager' or both—users should **select both**.

☐ Click **Register**.

☐ **After completing** your PSE EnergyCAP® **registration**, **check your email** for a message from PSE EnergyCAP® to activate your account. **PSE may take up to 24 hours to create new accounts.**

☐ **Once your organization is registered** with a new PSE EnergyCAP® account, **return to PSE EnergyCAP® login** page.

ENERGYCAP®

Email

Continue

Tip: EnergyCAP® will launch a tutorial for new users when you successfully create a new account and login for the first time. The tutorial provides an overview of the system and how to navigate key features of the tool.


Welcome to EnergyCAP Utility Company Platform

Energy and sustainability benchmarking compliance software designed for utilities.

Comply with benchmarking mandates, automatically submit to ENERGY STAR®, and get visibility into your energy data.

Skip   Start Quick Tour

HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484
Virtual help by appointment.

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2. Add a Building in EnergyCAP

☐ After logging into EnergyCAP®, **click** on **"All Buildings and Organizations"** at the **bottom left of the page**.
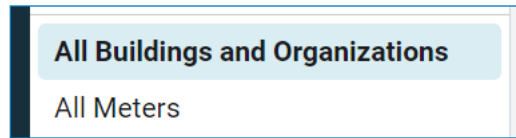
☐ From this page, **navigate** to the top **right corner of the page**, and **click** on the "Add" drop down and **select** "Add Building".
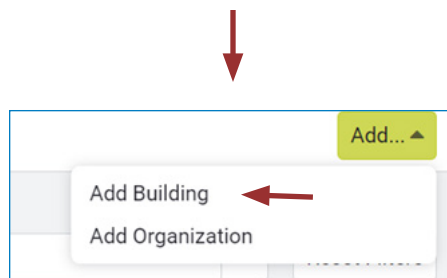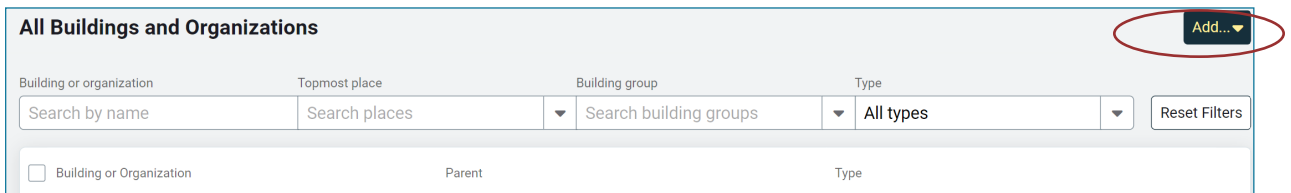
☐ **Fill** in the building information to match the building information in ENERGY STAR Portfolio Manager and **click** "Save" at the top right.
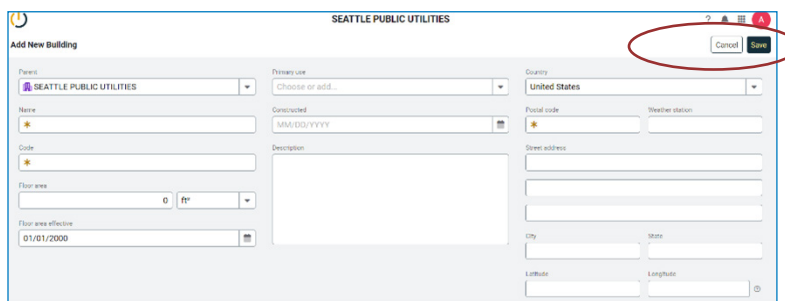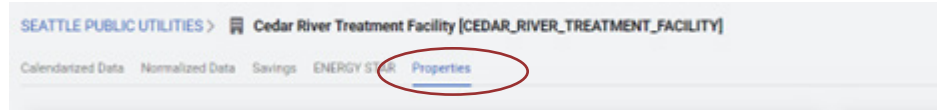

NOTE "Parent" in this section is auto filled and is referring to your Organization Name. "Code" field is also auto generated based on the name you entered for your building. For "Constructed", enter Jan 1st of built year to match the dates in Portfolio Manager.
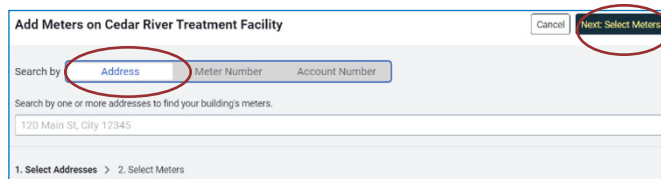
3. Add Meter(s) in EnergyCAP

☐ Next, **assign the building** as the parent of a new or existing **gas meter**.

☐ On the **buildings summary page** in EnergyCAP®, **select** the "**Properties**" tab.

SEATTLE PUBLIC UTILITIES > 🏛 Cedar River Treatment Facility [CEDAR_RIVER_TREATMENT_FACILITY]

Calendarized Data   Normalized Data   Savings   ENERGY STAR   Properties

☐ When setting up meters for the first time, an **alert will pop up** that says, "this building has no meters".

Meters - 0   Add Meters

This building has no meters.

A meter tracks the use and cost of a commodity. To track use and cost data on your building add a meter for each commodity.

Learn more about meters ↗

ⓘ From the ENERGY STAR tab, configure this building to submit usage data to ENERGY STAR Portfolio Manager   ✕
and receive scores on your building's energy usage. **Go to ENERGY STAR tab**
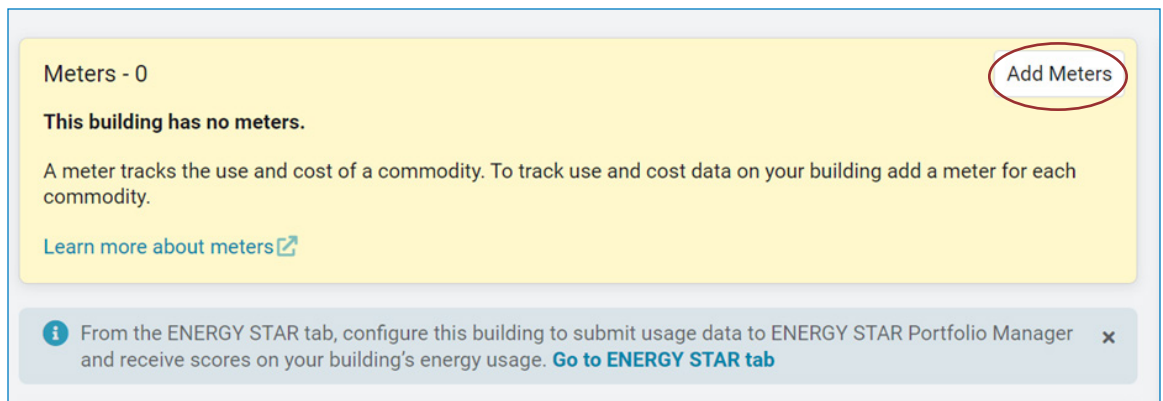
☐ **Click** the box **"Add Meters"**.

☐ Enter either the address, meter number or account number to search. **The search bar is dynamic and will start populating suggested addresses as you type.**

Add Meters on Cedar River Treatment Facility   Cancel   Next: Select Meters

Search by   [Address]   Meter Number   Account Number

Search by one or more addresses to find your building's meters.

120 Main St, City 12345

1. Select Addresses > 2. Select Meters

*IMPORTANT If you are reporting a multifamily property be sure to search **all** associated addresses. Buildings that do not report complete natural gas consumption will be required to correct inaccurate accounts.*

☐ Once the search is complete **an alert will pop up** noting how many meters are at the service address searched. If this number is less than the total number of gas meters serving the building, you can **add multiple service addresses** associated with the building by selecting **"Back: Select Addresses"** at top right corner.

☐ **Check** all **relevant addresses**, once selected **click "Next: Select Meters"**. On the next page, **click "Add Meters"** in the top right corner. **Proceed to the next step**.

IMPORTANT Once enrollment is complete, meters will be displayed with the meter number for each gas meter in Portfolio Manager. You may edit the meter name to include additional identifying information, such as the name of the tenant or associated space-use the meter serves. This information will be useful for energy analysis, evaluation of data accuracy and to troubleshoot consumption or data reporting errors.

Note If the building is known to have gas usage and no meters are displaying for the address or account number searched, double check the information. EnergyCAP® will only display active meters. **PSE defines 'active meters' as meters that have an active gas hookup with an open PSE account billed monthly.** Meters are considered inactive if the associated PSE account has been closed for 6 or more business days. This is most common with change of tenants/ move-in and move outs. The meter may appear gray if inactive, and you will be unable to add the meter. Contact PSE at energycap@pse.com for guidance on how to obtain historical data for inactive meters.

4. Complete Authorization Form (if promted)

☐ EnergyCAP® will prompt you if a release form is required to complete the enrollment process.

NOTE PSE's privacy policy requires release forms for buildings with fewer than 3 individual account holders. If prompted, each account holder must complete and sign a PSE Customer Data Release Form. See options to complete the process.

1. **Click** on your property name to the **left.**
2. Go to the **"Properties"** tab.
3. Under the "Data Release" column, **click "Request".**
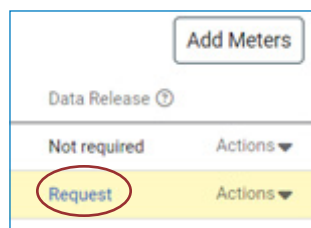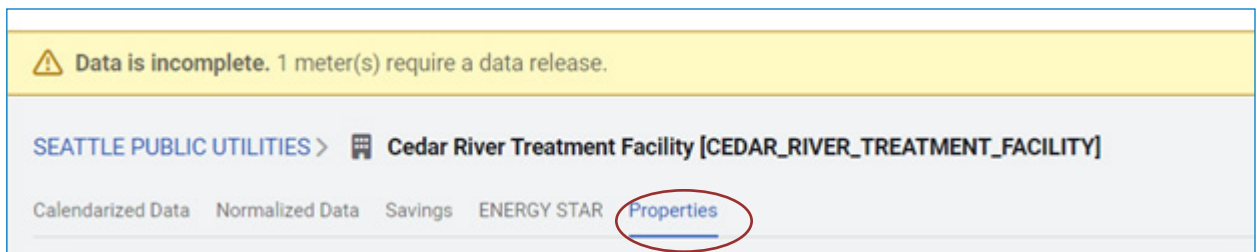
☐ You have **two options to complete the release form** process:

1. **Send emails to your tenant(s) directly from EnergyCAP** requesting them to complete and sign the PSE data release form(s) electronically **OR**

2. **Download blank release form(s)**, gather required information and signatures from tenant(s), **scan and upload completed form in EnergyCAP.**
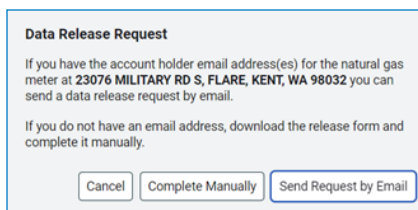
Send Request by Email Option:

1. **Click** "Send Request by Email"

2. Complete the **tenant name** and **email** information.

3. **Click** submit.

4. The **tenant will receive an email with a link** to authorize and **complete electronically.**
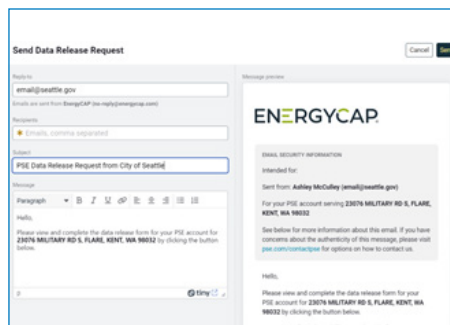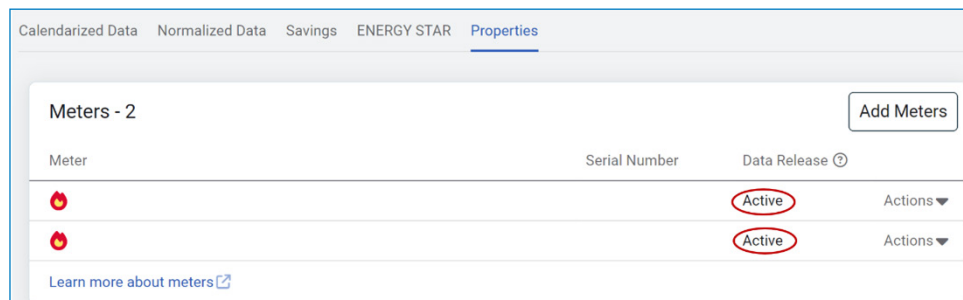
Complete Manual Option:

1. Click "**Download Form**".
2. **Coordinate with tenants** to complete and sign form. Tenants wil need to know their **service address** and **PSE account number**.
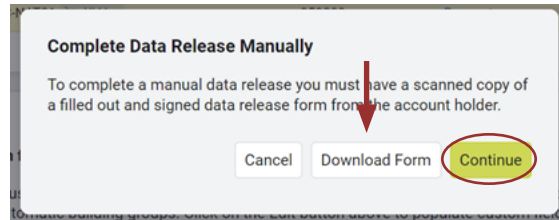
3. Once completed, **scan a copy to your computer**.
4. **Log in** to your **EnergyCAP** account and **return** to the **Properties tab**, click "Request" and **select the option to complete manually**.
5. **Click "Continue"** to upload completed authorization forms to EnergyCAP.

IMPORTANT The status of your release forms under the properties tab will show "Active" if successful. When succesfully completed, PSE will populate the most current 24 months of meter consumption data into EnergyCAP®.

NOTE EnergyCAP® refreshes data daily at midnight. If you do *not see your authorization forms processed* OR your newly added *meters are missing consumption* in 2 business days, contact PSE's User Support at EnergyCAP@pse.com.

5. Add PSE EnergyCAP® as a Contact and Share Building in Portfolio Manager

Once all meters with complete consumption have been successfully added to your building in EnergyCAP®, you are ready to authorize data submission to ENERGY STAR® Portfolio Manager®.

IMPORTANT Before you can do this, you must link your building in EnergyCAP® to your building in Portfolio Manager.

☐ **Navigate** to your building in EnergyCAP® and **click** the "ENERGY STAR" tab, then **select "Get Started" button**.
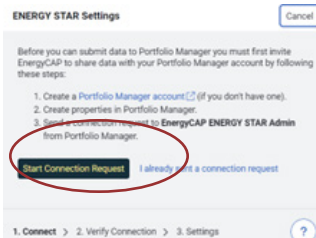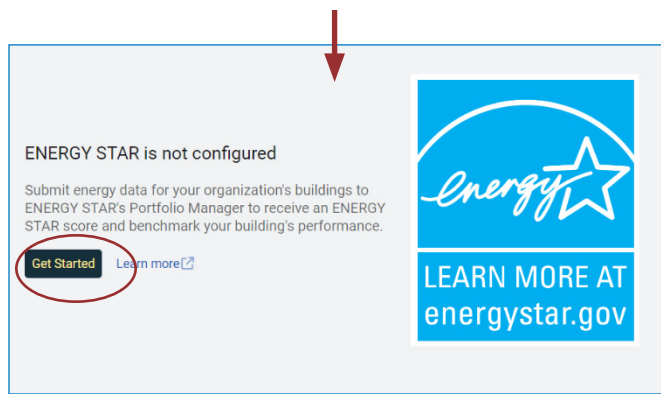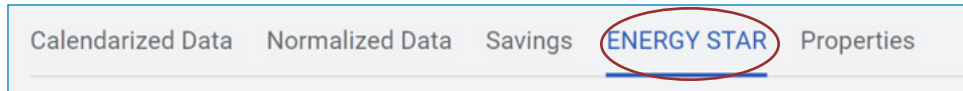
1. Click the **Start Connection Request** button.

2. You will be directed to the **login** screen of your Portfolio Manager account. Enter your **username and password**.

☐ Once you have entered your Portfolio Manager login credentials you will automatically be taken to the page to **add " EnergyCAP ENERGY STAR Admin (GSS_ENERGYCAP)"** as a contact.

☐ Click the **Send Connection Request** button.
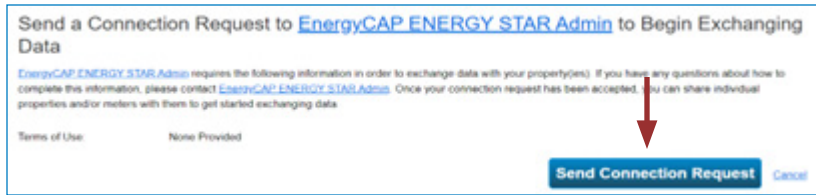
IMPORTANT *Once PSE EnergyCAP® has accepted the connection request, you must then verify the connection request was successful in your EnergyCAP® account.*

☐ **Navigate** back to EnergyCAP® account in **your web browser**.

☐ Go to the **"ENERGY STAR"** tab on your properties page.

☐ **Select** "ENERGY STAR" settings, then **enter your ENERGY STAR Portfolio Manager Username**.

☐ Click **Verify**.

☐ Once the connection request is **verified as accepted**, you will **return to Portfolio Manager** to **share the building (and its associated meters)** with EnergyCAP®.

☐ **In Portfolio Manager**, Go to the **Sharing Tab** and **click on the "Share with your Utility or Service Provider for exchanging data"** option.

       1. Click **on "Select Properties"**
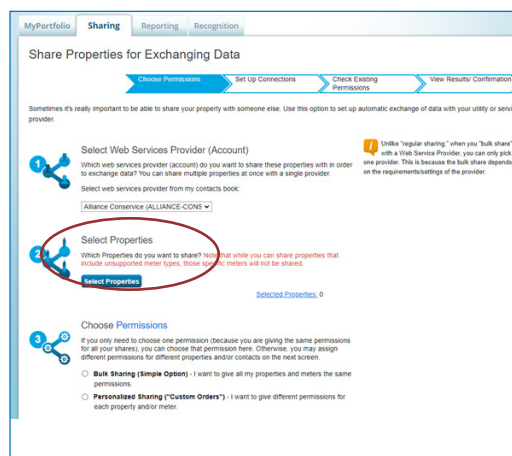
2. **Check the box next to the properties you wish to share**, then select "Apply Selection".
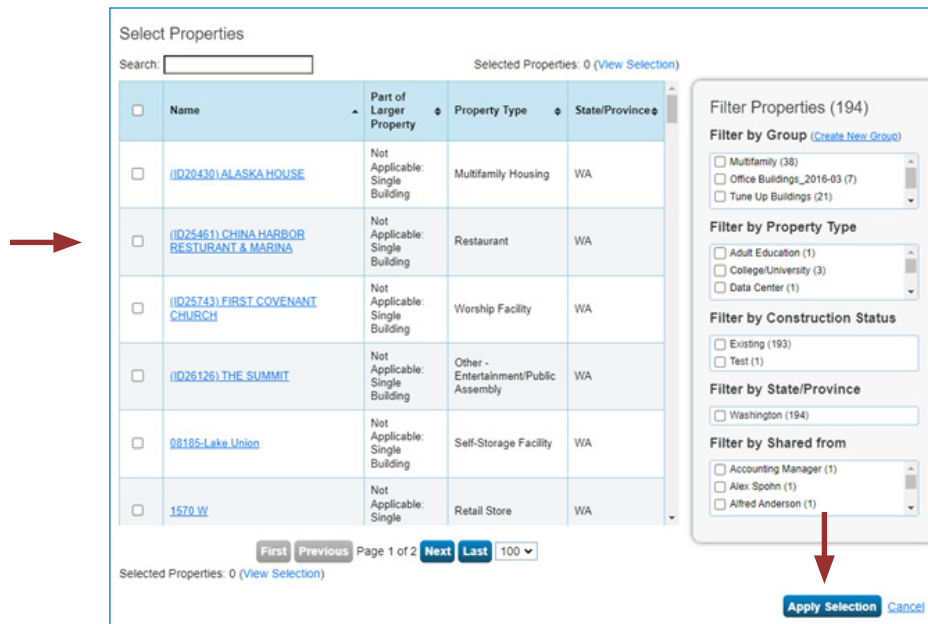
3. Under **Choose Permissions**, select the first option: **"Bulk Sharing"**. Click **Continue**.

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

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

   1. Property Information: **Full Access** (PSE requires Full Access so that they can create a new meter in your account.). *Any non-PSE meters, such as Seattle City Light must also be listed as None for access.*

   2. All Meter Information: Leave as **None**. (Choose None for access, even if old PSE meters are listed. Leave any meter numbers as is.).

   3. Goals, Improvements: Leave as **None**

   4. Recognition: Leave as **None**

   5. Scroll down. For **Share Forward**, select "Yes".

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

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

   NOTE Your sharing request should be accepted by PSE in approximately **1 hour.**

   IMPORTANT Do not start the Configure Building in EnergyCAP® step, until Puget Sound Energy is listed as having Exchange Data permissions in Portfolio Manager.

HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484
Virtual help by appointment.

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6. Configure Building in EnergyCAP®

☐ Once PSE is listed as having Exchange Data permissions, **navigate to your building in EnergyCAP®** and **click** the "ENERGY STAR" tab.
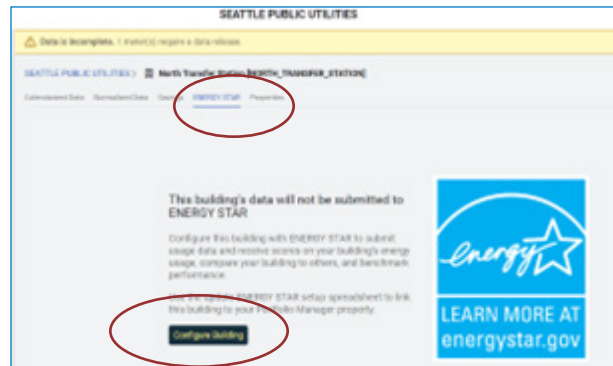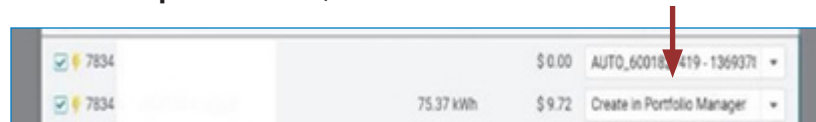

☐ Click **"Configure Building"** to link the EnergyCAP® property with your ENERGY STAR Portfolio Manager property.

☐ **Click the drop-down menu** for "Portfolio Manager Property is required".
   Note: You should see a list of all your properties that have Full Access Permission with EnergyCAP® from ESPM. The list will show the PM Building ID# under the property name, Double check you are linking the correct property.

Tip If your building does not show up on this list, it could be that you are not correctly sharing the property with EnergyCAP®. Please be sure to give Full Access to EnergyCAP® as instructed on the previous page.
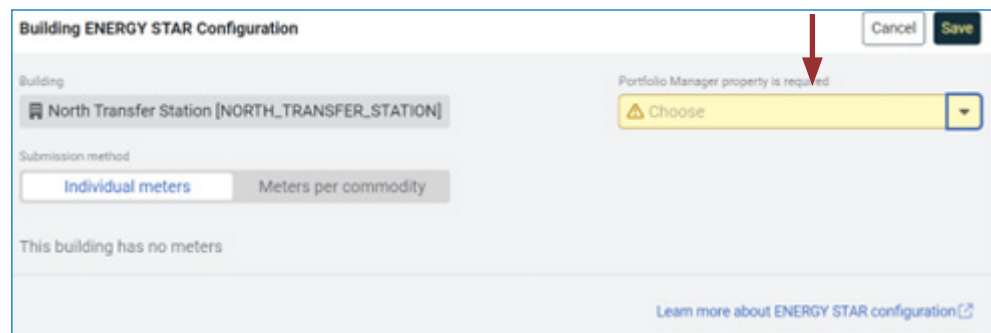
Note: select the **Property** to configure in Portfolio Manager, then **select the checkboxes next to the active meters.**

☐ From the **dropdown menu**, select **"Create a New Meter in Portfolio Manager".**

☐ Click **"Save"**.

HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484
Virtual help by appointment.

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☐ The **ENERGY STAR tab in EnergyCAP®** should display that your building is **ready to submit the consumption data to Portfolio Manager.**

☐ **In Portfolio Manager**, select the **Energy tab. You should now see those new PSE Meters added**.

IMPORTANT the meters will not have consumption data until you complete Submit Consumption Data to Portfolio Manager.

7. Submit Consumption Data in EnergyCAP® to Portfolio Manager
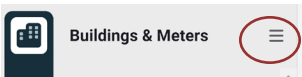
☐ **In EnergyCAP®**, click on the button (3 lines) next to **Building & Meters.**

☐ Select **Submit to ENERGY STAR** from the dropdown menu.

☐ **Input** the Building Group, Month, or Month Range and Status.

NOTE The earliest month should be the date the meter became active, and should at a minimum be January of the year you are submitting consumption data for. For example, for reporting 2023 data, the earliest month should be no later than January 2023.

☐ Click **Continue**.

☐ **Select** all of the **months marked ready** that you would like to Submit to ENERGY STAR Portfolio Manager.

IMPORTANT This step is only completed once. Once the building is successfully enrolled in automated data exchange, PSE will push the data from EnergyCAP® to Portfolio Manager monthly.

☐ Once all months are selected, **Three different statuses** will show up in the **Submit to ENERGY STAR window**: Ready, Submitted, and Incomplete.
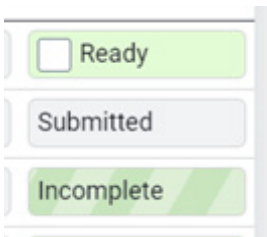
☐ **Ready** indicates the data for a particular month is loaded into EnergyCAP® and ready to **submit** to Portfolio Manager.

☐ **Submitted** confirms the data has been submitted to Portfolio Manager.

☐ **Incomplete** indicates something is wrong with the meter in EnergyCAP® and errors must be resolved to complete the enrollment process.
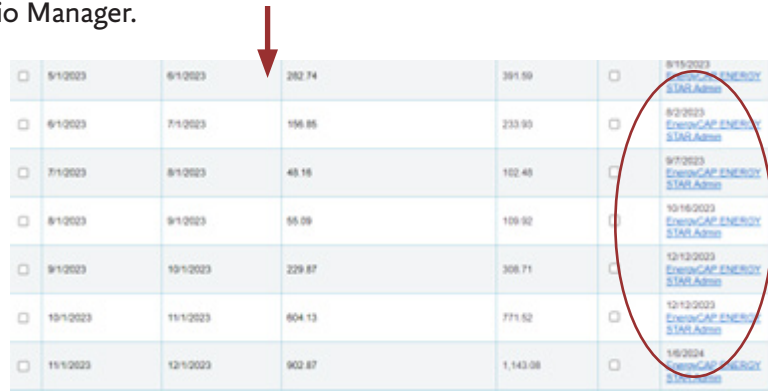
IMPORTANT If you see an incomplete status contact EnergyCAP@pse.com to troubleshoot.

☐ Once EnergyCAP® **displays "Submitted"** for all gas meters with complete consumption, **navigate** to Portfolio Manager to **confirm meter consumption has been populated.**

☐ **Click** on the Natural Gas **Meter.**

☐ **Monthly entries should be populated** with consumption data and cost data, dating back to the **date you chose in EnergyCAP** to begin pushing meters to Portfolio Manager.

IMPORTANT There should be no gaps of monthly data in Portfolio Manager. If you don't have complete data for the required reporting year be sure to check the date you chose to start auto uploads from EnergyCAP to Portfolio Manager.