

CITY OF PORTLAND

ENERGY REPORTING

HOW-TO GUIDE

FEBRUARY 2018

**UNDERSTANDING THE REPORTING
REQUIREMENTS OF THE
ENERGY PERFORMANCE POLICY
FOR COMMERCIAL BUILDINGS**

www.portlandoregon.gov/bps/energyreporting



Bureau of Planning and Sustainability
City of Portland, Oregon

1900 SW 4th Ave. Suite 7100, Portland, OR 97201



Policy Background

Portland City Council approved a policy in April 2015 that requires owners of commercial buildings 20,000 square feet and larger to:

1. Use ENERGY STAR® Portfolio Manager®, a free web-based benchmarking tool to calculate energy use intensity (EUI), an ENERGY STAR score (when applicable) and carbon emissions.
2. Report this information to the City of Portland on an annual basis.

The policy covers nearly 80 percent of the commercial square footage in Portland, affecting approximately 1,000 buildings. It does not include residential properties, nursing homes, places of worship, parking structures, K-12 schools, industrial facilities or warehouses. There are nearly 5,000 commercial buildings in Portland and fewer than 100 currently claim ENERGY STAR certification.

Reports are due April 22nd of each year and cover the previous calendar year.

The City of Portland makes energy performance information readily available to the public for any individual covered building. Annual building energy performance reporting results are available online at www.portlandoregon.gov/bps/energyreporting.

Individual building information can also be viewed and compared to other buildings through the City's online Commercial Building Energy Map.

Portland isn't the first city in the U.S. that has implemented this kind of policy. Building energy benchmarking and reporting policies in 24 other U.S. cities — and the entire states of California and Washington — have proven to motivate investment in efficiency improvements that save money and reduce carbon emissions. This policy:

- Advances the City's Climate Action Plan objective to reduce energy use in buildings.
- Helps building operators track energy use and identify options to improve efficiency.
- Reduces energy costs.
- Provides market recognition for the most efficient buildings.
- Gives prospective buyers and tenants information to make informed decisions.

Acknowledgments

The City of Portland wishes to thank the City of Seattle and Northwest Energy Efficiency Council for their contributions in developing this How-to Guide.

>> *For more information about the policy visit www.portlandoregon.gov/bps/energyreporting. You may also call the City of Portland Energy Reporting Help Desk at 503-823-7070 or email energyreporting@portlandoregon.gov.*

COMPLIANCE CHECKLIST

5 Steps to comply with the City of Portland’s Energy Performance Reporting Requirements by April 22nd of each year.

STEP 1 | Get Started

- Determine if your building is required to report..... 1
- Provide a primary contact person..... 2

STEP 2 | Set Up Your Account and Property in ENERGY STAR® Portfolio Manager®

- Create a new Portfolio Manager account..... 3
- Set up your property in Portfolio Manager 4

STEP 3 | Enter Your Energy Meter Usage Data

- OPTION 1: Manually enter your building’s energy use data based on available records 5
- OPTION 2: Request aggregated whole building data from your utility 6

STEP 4 | Include Additional Property Information

- Enter City of Portland Building ID (required) 8
- Enter property notes (optional)..... 9

STEP 5 | Report to the City of Portland Annually

- Review your building information 10
- Add the reporting template to your account..... 11
- Submit your report in Portfolio Manager 12

APPENDICES

- Appendix A: Property use details worksheet..... 10
- Appendix B: Tenant data request..... 11

NOTE: It is the responsibility of the property owner on record to confirm annual compliance with the City of Portland Energy Performance Reporting Policy for Commercial Buildings.

PREFER TO HIRE AN OUTSIDE SERVICE PROVIDER? The Northwest Energy Efficiency Council maintains a directory of businesses that can help with energy benchmarking and reporting energy performance: www.neec.net/industry-resources/portland-energy-reporting-benchmark-list/.

STEP 1 | Get Started


Determine if your building is required to report.

Reporting requirements are based on building square footage and types of use. A “Covered Building” has a Gross Floor Area (GFA) of at least 20,000 square feet, where no more than 50 percent of the GFA is used for housing, nursing home, parking, K-12 education, industrial, warehouse or worship purposes.

After determining if your building’s space type is covered, the next step is to calculate the GFA of the building. GFA is the total building square footage, as measured between the principal exterior surfaces of the enclosing fixed walls of the building(s). This includes all finished areas inside the building(s) including supporting areas. This is not the same as rentable or leasable space.

GFA includes ALL areas inside the building such as tenant spaces, common areas, meeting rooms, break rooms, restrooms, elevator shafts, mechanical equipment areas and storage rooms.


- Do not include any exterior spaces such as balconies or exterior loading docks and driveways.
- In the case where there is an atrium, only the base floor area should be counted. Do not increase the size to accommodate open atrium space at higher levels.

 **Is your building required to report?** If so, first provide a primary contact person and then complete Steps 2 through 5.

Provide a primary contact person.

Create or change your primary contact information through the “Establish/Update a Building Contact” web form: www.portlandoregon.gov/bps/establishcontact

Note that the property owner is ultimately responsible for reporting, even if a third party is designated as the contact person.

 **Already benchmarking in Portfolio Manager?** If you currently benchmark your building using Portfolio Manager, make sure that your property use details are up to date, and then skip to Step 4 to add your City of Portland Building ID to the building profile.

STEP 2 | Set up your account and property in ENERGY STAR® Portfolio Manager®

Create a new Portfolio Manager account.

- Open an Internet browser and go to www.energystar.gov/benchmark.
- On the right side of the page, click **REGISTER NOW**.

The screenshot displays the ENERGY STAR Portfolio Manager website. At the top, it says "ENERGY STAR Portfolio Manager® The most-used energy measurement and tracking tool for commercial buildings." Below this, there are several sections: "Use Portfolio Manager" with a brief description, "Not sure if Portfolio Manager is for you? It is!" with a list of building types, and "Join the rest of the industry." with a statistic. On the right side, there are promotional banners for a "New Licensed Professional Finder" and a "New! Licensed Professional Finder" section. At the bottom right, there is a "Log in" section with fields for "username" and "password", and a "LOGIN" button. A red circle highlights the "register now" link in the bottom right corner.

NOTES FOR CREATING YOUR ACCOUNT LOGIN:

- You will need your username and password later in the process to e-sign your report submission.
- KEEP A RECORD of the username, password, and the answers to your security questions — it is not possible to change usernames and it can be difficult to recover a lost username or password!
- Create a central login for your building(s) that can be accessed by any party responsible for reporting.

- Enter your user profile information.
- For Reporting Units, choose **Conventional EPA Units (e.g., kBtu/ft2)**.
- Click **Create My Account** at the bottom of the page.

Tip

Before setting up your property in Portfolio Manager, it can be helpful to gather building use details, including for tenant spaces. See Appendix A for a list of details by use type.

Portfolio Manager does not automatically save your data when you are going through the initial property set-up process. Reserve enough time to get through the set-up windows from start to finish.

Set up your property in Portfolio Manager.

- After you have created an account, you will be prompted to set up a property. Or, if you have an existing account, choose **Add a Property** from the **My Portfolio** tab.
- Select the property's primary function from the drop-down menu. The property use type will help determine whether your building is eligible for an ENERGY STAR score which allows for easy comparison between buildings of similar types.

Review the list of property use types and their definitions at www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager/identify-your-property-type.

- Select **One: My property is a single building**.*

*The **More than One option** should only be used if two or more buildings are sharing a meter. Before selecting this option, call the City of Portland Energy Reporting Help Desk at **503-823-7070** or email energyreporting@portlandoregon.gov.

- Select **Existing** as the property's construction status.
- Click **Get Started!**

The screenshot shows a web form titled "Set up a Property: Let's Get Started!". The form is divided into three main sections: "Your Property's Primary Function", "Your Property's Buildings", and "Your Property's Construction Status".

- Your Property's Primary Function:** A dropdown menu is set to "Select a primary function". A tip on the right says: "To set up a property, you'll need information such as gross floor area and operating hours."
- Your Property's Buildings:** A question asks "How many physical buildings do you consider part of your property?". Three radio buttons are visible: "None: My property is part of a building", "One: My property is a single building" (which is selected), and "More than One: My property includes multiple buildings (Campus Quadance)". A text input field for "How many?" is empty. A tip on the right says: "Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity."
- Your Property's Construction Status:** A question asks "Is your property already built or are you entering this property as a construction project that has not yet been completed?". Three radio buttons are visible: "Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition." (which is selected), "Design Project: My property is in the conceptual design phase (pre-construction). I will be using Portfolio Manager to evaluate the energy efficiency of the design project.", and "Test Property: This is a fictitious property I am entering into Portfolio Manager in order to try out features or for other purposes such as training others." A tip on the right says: "You may want to enter a property into Portfolio Manager that isn't actually a 'real' property, either to familiarize yourself with features or maybe to train other people. By telling us this a 'Test' property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your Account Settings."

At the bottom of the form, there are two buttons: "Get Started!" and "Cancel".

? **What if my building contains multiple property use types?** You will need to select one primary property use type to represent your building. If there are other significant uses within the building, you may add other property use types in a subsequent step. Read the definition for each property use type before selecting it by visiting: www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager/identify-your-property-type.

For example, if you have a 40,000 square foot office building and it has a 10,000 square foot laboratory, you would select Office as your primary use type. You will subsequently be able to add Laboratory as a secondary use type.

You should only enter “Mixed Use” as a primary property type if the building does not have a single use that is greater than 50 percent of the floor area. An example would be a 60,000 square foot building that has 20,000 square feet of Retail, 20,000 square feet of Office and 20,000 square feet of Residential.

You should only select one of the “Other” categories if the use building’s type does not match any of the other existing categories.

? **When should I separate out my property into different use types?** You should refer to the definitions provided by Portfolio Manager. For some property types, you may not need to break out small and common uses. For example, a large office tower is expected to have a small amount of ground floor retail and/or restaurant space.

Some buildings are designed to contain many small spaces with different uses and there may be an overarching use type to represent that. For example, if your building contains a collection of small spaces that qualify as Retail, Medical Office, Restaurant and a Bank, your building may be more accurately characterized as a Strip Mall.

? **What about data centers?** Most commercial buildings will have a server closet to meet the needs of computing equipment. This space can be entered into Portfolio Manager as an **Office** use type by counting each server as a computer in the use details.

Some buildings have large data centers to support their operations. Sub-metering a data center’s energy use is not required for City of Portland reporting, but it is required if you wish to apply for ENERGY STAR certification. Furthermore, Portfolio Manager will provide a more accurate assessment of the building’s performance when energy use data is metered and entered separately. A Data Center is defined as having a constant total power load of 75 kW or more.

To learn more about whether to enter your data center, visit: portfoliomanager.zendesk.com/hc/en-us/articles/211026598-What-is-the-definition-of-Data-Center-.

- Enter basic property information, including the building name, street address, year built and total GFA.
- Enter the **Occupancy** based on the percentage of your property’s GFA that is occupied and operational. For example, if you have a 10-story building that, on average, has 9 of its 10 floors fully leased and occupied, the occupancy would be 90%. You do not need to count empty cubicles. The value you enter for occupancy will not affect how the building’s ENERGY STAR score or other metrics, are calculated, but it could affect whether the building is eligible for an ENERGY STAR score. Offices, Banks, Courthouses, Financial Centers, and Hotels have minimum occupancy requirements to qualify for a score.
- If there is a parking lot or structure affiliated with the building and its energy use is not separately metered, SELECT **My property’s energy consumption includes parking areas**. If unsure, you can add parking as a property use type later.
- Click **Continue**.
- Enter additional details based on the primary use type you entered on the previous page. For all buildings, you must enter the Gross Floor Area of the property use type, as indicated by the red asterisk.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	* 40,000 <input type="text"/> Sq. Ft. <input type="button" value="v"/>	1/1/1948 <input type="button" value="calendar"/>	<input type="checkbox"/>
Weekly Operating Hours	<input type="text"/>	1/1/1948 <input type="button" value="calendar"/>	<input type="checkbox"/>
Number of Workers on Main Shift	<input type="text"/>	1/1/1948 <input type="button" value="calendar"/>	<input type="checkbox"/>
Number of Computers	<input type="text"/>	1/1/1948 <input type="button" value="calendar"/>	<input type="checkbox"/>

If the building is eligible for an ENERGY STAR score, you must enter all of the property use details indicated by the blue star icons.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 50,000 <input type="text"/> Sq. Ft. <input type="button" value="v"/>	1/1/1912 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1912 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1912 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1912 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text"/> <input type="button" value="v"/> <input type="checkbox"/> Use a default	1/1/1912 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> <input type="button" value="v"/> <input type="checkbox"/> Use a default	1/1/1912 <input type="button" value="calendar"/>	<input type="checkbox"/>

DO NOT select default or temporary values. You must only enter actual values to comply with the City's requirements. Reports containing default or temporary values are considered errors and will result in the City requiring an error correction and resubmittal.


The specific type of property use details will differ based on the use(s) of the building. Common areas, such as mechanical rooms, hallways, kitchens and lobbies should be included in the GFA of the primary use type. Refer to **Appendix A** for a worksheet to help gather property use details.

Tip

More about parking: The GFA and energy use for parking areas should NOT be entered if the parking area is separately metered. **If a single energy meter covers both parking and other defined uses within the building, then the parking must be included in the GFA calculation,** and the area devoted to parking should be added as a property use type. An example of this is, if a parking garage's lighting and ventilation is connected to the "house" meter, which also serves other building uses. Portfolio Manager will make an adjustment to accommodate the presence of parking for this common type of meter configuration.

? **What about my tenant spaces?** The building owner is required to report **ALL** energy usage occurring within the building, including tenant spaces. If the building is an office tower or a strip mall, for example, the owner is responsible for compiling utility data for all building tenants (see Step 3 for instructions relating to obtaining a tenant's energy utility data). If the building is eligible for an ENERGY STAR score, the building owner must also obtain the required property use details. If you are unsure which details you will need to collect, refer to Portfolio Manager's data collection worksheet: portfoliomanager.energystar.gov/pm/dataCollectionWorksheet

Upon receipt of a written or electronic request from the building owner, each tenant is required to provide all information necessary for the owner to comply with the City of Portland's reporting requirements. If a tenant moves out, be sure to obtain this information before your tenant vacates. Refer to **Appendix B** for a sample tenant information request letter. If a tenant is not responsive, please contact the City of Portland Energy Reporting Help Desk at 503-823-7070 or email energyreporting@portlandoregon.gov for assistance.

 **What about vacant spaces?** Vacancy refers to a portion of the building that is not in use for a temporary period of time, such as a suite or entire floor that is not leased or occupied. If your building includes Office, Medical Office, Bank, Courthouse or Financial Center property use types and more than 10% of your property is consistently vacant over the course of the calendar year, you are required to add a separate property use type to represent the vacant space. This will be factored in to the building's energy performance metrics. To enter the vacant space, first ensure that the primary property use type has been set up. Then, use the following instructions:

1. Click **Add Another Type of Use**.
2. Choose the same primary property use type.
3. Assign the appropriate amount of square footage to represent the annual average vacant space.
4. Enter a value of zero for the **Weekly Operating Hours** and all other fields in the **Property Use Details** section.
5. Click **Save**.
6. If needed, go back into the primary property use type by using the **Action** drop-down and selecting **I want to...Correct Mistakes** and adjust the square footage by subtracting the vacant use floor area. Click the **Save Corrections** button. The vacant and occupied floor area must add up to the total floor area of the building.

If there is a change in vacancy in a subsequent reporting year, be sure to update the square footage and property use details in both the primary use type and vacant space type. If your building is an Office, Bank, Courthouse, Financial Center or Hotel, you should also update the Occupancy of the building in the **Basic Information** box in the **Details** tab.

All other property types do not require you to reflect vacancy in the use details, but you may indicate any energy use anomalies due to a vacancy in the **Property Notes** section of your building's profile.

STEP 3 | Enter your energy usage data

Monthly energy use data for all fuel types (e.g. electricity, natural gas, etc.) serving the building must be entered for the entire 12 months of the calendar year to be reported. The data MUST, at minimum, be populated for January 1 through December 31 of the reporting calendar year. If your billing period occurs in the middle of the month, you may need to enter billing data before or after the beginning and/or end of the year. For example, if you are reporting energy usage for 2017 and your billing date is 12/15/2016-1/15/2017, you must enter the billing dates accordingly and include all energy usage for that billing period. Portfolio Manager will make an adjustment to reflect the calendar year.

There are two primary options for you to obtain and input your building's energy usage data into Portfolio Manager:

Option 1

Manually enter your building's energy use data based on available records. This option is recommended if...

- There are not many energy meters serving the building.
- You do not have tenants or your tenants are not billed separately (e.g. gross or full service lease).
- You receive and/or have access to all the energy use data for the building. This is mostly likely through paper bills from your utility or accessing your account information online.
- You would like to use Portfolio Manager throughout the year to monitor your building's energy use.

-OR-

Option 2

Request aggregated whole building data from your utility. This option is recommended if...

- You have tenants that are billed separately for their energy usage (e.g. triple net lease).
- There are many energy meters serving the building.
- You do not have access to your historical utility billing information.

Note that in some cases, you may end up using a combination of these options depending on how your building is set up. For example, if you manage an office building with many tenants that receive separate electrical bills, you may opt to request aggregated data from your utility for the building's electrical meters. The same building may be served by a single natural gas meter for which you receive the bills, so you may wish to manually enter that data instead of going through NW Natural.

The following section provides instructions for gathering and entering your building's energy data according to the two options described above.

Option 1: Manually enter your building's energy use data based on available records.

Set up your energy meters

- Gather your building's energy usage data for the calendar year for which reporting is due. You will need the dates of the billing period and the usage (e.g., kWh, therms).
- Within your property's profile, go to the **Energy** tab and click on the **Add A Meter** button.



- Select the types of fuel (e.g. electric, natural gas).
- For each type, enter the number of meters for that particular fuel type.
- Then click **Get Started!**



- In the **About Your Meters** table, click in the **Units** field to show a drop-down menu.
 - For **Electricity** meters, choose **kWh (kilowatt hours)**.
 - For **Natural Gas** meters, choose **therms**.
- Double check the units to make sure they align with the units in the billing data you gathered.
- Under **Date Meter Became Active**, enter the first date of the first bill you plan to enter.
- Make sure the box in the **In Use?** column is checked.

About Your Meters for Portland Energy Reporting Demo Building

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

2 Energy Meters for Portland Energy Reporting Demo Building (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
<input type="checkbox"/>	Natural Gas	Natural Gas				<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		<input type="checkbox"/>

[Delete Selected Entries](#)

[Add Another Entry](#)

- Click **Create Meters**.

Tip

After your meters are created, they can be renamed by clicking Edit next to the meter. Consider a naming convention that allows for others in your organization to identify the meter. Take into account factors such as whether the meter serves a specific area of the building. Or assign the actual meter number as the meter name.

- Click anywhere in the meter table to begin entering the bill dates and usage for each month. To add another bill date, click **Add Another Entry**. The next billing date will be automatically populated for you, but you may need to adjust the dates if it doesn't match your billing period.

Monthly Entries

Display Year(s):

Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost (\$)	Estimation	Green Power	Last Updated
Click to add an entry						

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

- If you have additional meters, click on the gray arrow in the next meter field to add data for this meter.
- Repeat with remaining meters until all meter data for the building is entered.
- Once you have finished entering data for all meters serving the entire building for all 12 months of the reporting calendar year, click **Continue**.
- Click **Save Bills**.

Select meters to include in metrics

- Once energy use data has been added for each meter, you will be asked to select energy meters to include in the energy metrics calculations. All meters should be included unless they are sub-meters (i.e. if sub-meters are entered in addition to their “parent” meter, only include the “parent”) in order to avoid double counting of the energy usage.
- Check the box(es) in the table for each meter to be included in your energy metrics.
- Underneath the table, indicate whether or not the selected meter(s) represent the total energy consumption for the building.
- Click **Apply Selections** once complete.

ENERGY STAR® PortfolioManager®

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

MyPortfolio | Sharing | Reporting | Recognition

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for *Test Office 2017* so that we can provide you with the most accurate metrics possible.

Summary

0

Please select at least one meter and tell us what it represents.

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g. artificially increase your Site Energy Use Intensity). [Learn More about combining meters for performance metrics.](#)

Energy Meters

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

<input type="checkbox"/>	Meter Name ID	Type
<input type="checkbox"/>	Natural Gas 24743105	Natural Gas
<input type="checkbox"/>	Electric - Grid Meter 24743106	Electric - Grid

Total of 0 meter(s). Tell us what this represents:

These meter(s) account for the total energy consumption for *Test Office 2017* (a single building).
 These meter(s) do not account for the total energy consumption for *Test Office 2017* (a single building).

Apply Selections Cancel

Tip

To comply with the City’s energy reporting requirements, the meters you select must represent all of the energy consumption for the building.

Option 2: Request aggregated whole building data from your utility.

For buildings with multiple energy meters, the building owner may request aggregated energy data from their energy utility. The building owner must identify all the utility meters serving the covered building, including any operating under tenant accounts. Once you have gathered the meter numbers serving the building, they will remain on file with the utility and they will only need to be modified if there is a change in the meters serving the building.

If your building has four or fewer separately metered tenants, you will need to obtain utility data release forms signed by each tenant account holder. If a tenant moves out, be sure to obtain these forms before your tenant vacates. Refer to **Appendix B** for a sample tenant information request letter.

The utilities have up to 45 days to respond to your request, but requests are often processed much sooner. However, you should still request your utility data well ahead of the April 22 reporting deadline to ensure you can submit your building's report on time. Note that requests may take longer to process during busy periods, such as immediately following a mass email notification or just prior to the reporting deadline.

PGE and NW Natural customers will upload a single data spreadsheet provided by the utility under one electric or natural gas meter in Portfolio Manager. Pacific Power customers will use the utility's automated data exchange. Once it is set up, whole building energy use data will automatically be uploaded into your Portfolio Manager account on a monthly basis.

For Pacific Power Customers

REQUESTING AUTOMATED WHOLE BUILDING DATA FROM PACIFIC POWER

To request your electric energy use data from Pacific Power, obtain the tenant data release form, or to ask questions, visit: www.pacificpower.net/epe/energy_benchmarking.html.

Pacific Power's automated data exchange will require that you set up an account in Resource Advisor and then connect the account to your Portfolio Manager account. Once your request has been processed, you will receive instructions via email to complete the connection. Depending on your organization's security filters, you may need to monitor the spam/junk folders for the Resource Advisor email. If you need assistance with the connection process, contact portfoliomanagersupport@ems.schneider-electric.com.

Once the process is complete, both the energy meter and the aggregated data will automatically populate in the Energy tab of your Portfolio Manager account and will be updated monthly on an ongoing basis.

For PGE or NW Natural Customers

REQUESTING AND ENTERING DATA FROM PGE OR NW NATURAL

PGE and NW Natural customers will upload a single data spreadsheet provided by the utility under one electric or natural gas meter in Portfolio Manager.

- To request your aggregate electric energy use data from PGE, obtain the tenant data release form, or to ask questions, visit: www.portlandgeneral.com/PortlandReporting
- To request your aggregate natural gas use data from NW Natural, obtain the tenant data release form, or ask questions, visit: www.nwnatural.com/business/benchmarking

Once your request has been processed, the utility will email you aggregated whole building data in a single spreadsheet as an attachment. Follow any instructions they have provided to unencrypt the file, if applicable, and save it to your computer.

Set up your energy meter(s):

- In your property's profile, go to the **Energy** tab and click on the **Add A Meter** button.



- Select the types of fuel (e.g. electric, natural gas).

- Enter the number of meters as “1” for electric and natural gas, if applicable. Even if you have multiple physical meters serving the building, you will only need one meter for each type set up within Portfolio Manager because the data for those meters has already been combined in the spreadsheet.
- Click **Get Started!**

- In the **About Your Meters** table, click in the **Units** field to show a drop-down menu.
 - For **Electricity** meters, choose **kWh (kilowatt hours)**.
 - For **Natural Gas** meters, choose **therms**.
- Under **Date Meter Became Active**, enter the first date of the first bill in your spreadsheet.
- Make sure the box in the **In Use?** column is checked.

About Your Meters for Portland Energy Reporting Demo Building

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

2 Energy Meters for Portland Energy Reporting Demo Building (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
<input type="checkbox"/>	Natural Gas	Natural Gas				<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		<input type="checkbox"/>

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

- Click **Create Meters**.

Upload energy use data:

- Find the **Upload data in bulk for this meter** section under the **Monthly Entries** table.
- Click on the **Browse...** button to navigate to where you saved the spreadsheet from the utility on your computer.
- Click **Upload**.
- The data contained in the spreadsheet will automatically populate in the **Monthly Entries** table.
- Click **Save Bills** at the bottom of the page.

The screenshot shows the 'Monthly Entries' interface. At the top, there is a 'Display Year(s):' dropdown menu set to 'Show All Years X'. Below this is a table with the following columns: Start Date, End Date, Usage kWh (thousand Watt-hours), Total Cost (\$), Estimation, Green Power, Demand (kW), Demand Cost (\$), and Last Updated. Under the table, there is a link 'Click to add an entry'. Below that are three links: 'Delete Selected Entries', 'Add Another Entry', and 'Learn how to copy/paste'. A section titled 'Upload data in bulk for this meter:' contains a tip: 'You can copy/paste into the table above (instructions in the FAQ) or upload an Excel spreadsheet using our simple spreadsheet template'. Below this tip are two buttons: 'Browse...' and 'Upload', which are circled in red. At the bottom right, there are two buttons: 'Save Bills' and 'Cancel'.

? **What if I can't get the spreadsheet to upload?** The most common reasons that the spreadsheet would fail to upload include:

1. The spreadsheet has not been unencrypted using the instructions sent to you by the utility.
2. Your computer may be running an old version of Microsoft Office that is not compatible with newer file formats.

If you are unable to upload the file, you can copy and paste the billing dates and usage into the **Monthly Entries** table, or you may wish to download the spreadsheet template, cut and paste the data to it, and then save and upload that file.

- Once energy use data has been added for each meter, you will be asked to select energy meters to include in the energy metrics calculations. All meters should be included unless they are sub-meters (i.e., if sub-meters are entered in addition to their “parent” meter, only include the “parent”) in order to avoid double counting of the energy usage.
- Check the box(es) in the table for each meter to be included in your energy metrics.
- Underneath the table, indicate whether or not the selected meter(s) represent the total energy consumption for the building.
- Click **Apply Selections** once complete.

ENERGY STAR® PortfolioManager®

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

MyPortfolio | Sharing | Reporting | Recognition

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for **Test Office 2017** so that we can provide you with the most accurate metrics possible.

Summary

0

Please select at least one meter and tell us what it represents.

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More About Including Meters for Performance Metrics](#)

Energy Meters

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

<input type="checkbox"/>	Name Meter ID	Type
<input type="checkbox"/>	Natural Gas 24743106	Natural Gas
<input type="checkbox"/>	Electric - Grid Meter 24743106	Electric - Grid

Total of 0 meter(s). Tell us what this represents:

- These meter(s) account for the total energy consumption for **Test Office 2017** (a single building).
- These meter(s) do not account for the total energy consumption for **Test Office 2017** (a single building).

Apply Selections Cancel

Tip

To comply with the City’s energy reporting requirements, the meters you select must represent all of the energy consumption for the building.

- ❓ **Does your building generate onsite renewable electricity through wind or solar photovoltaic power?** Onsite generation is treated as a fuel and entered into Portfolio Manager using a standard electricity meter in the Energy Meters section, similar to grid-purchased electricity. To enter on-site renewable energy, you must have data that shows how much energy the installation generated, whether any of the energy was exported off-site and how much supplemental electricity was purchased from a utility. Refer to Portfolio Manager’s Green Power Technical Reference to learn more: portfoliomanager.energystar.gov/pdf/reference/Green%20Power.pdf

STEP 4 | Include additional property information

Enter Portland Building ID (required)

- Each building is assigned a unique identification number (Portland Building ID) by the City of Portland. The Portland Building ID can be found on compliance notifications or using the online Building ID Lookup Tool: www.portlandoregon.gov/bps/BuildingID

If using the Lookup Tool, you should identify a single Building ID that reflects the footprint of your building. If your building includes more than one footprint/Building ID, please contact the Energy Reporting Help Desk at energyreporting@portlandoregon.gov or 503-823-7070 to determine if your building needs to be assigned a campus ID.

- The Portland Building ID must be accurately entered into Portfolio Manager, including capital letters and hyphens, to ensure compliance with the reporting requirements. The easiest way to ensure accuracy is to copy and paste your Portland Building ID from the Lookup Tool or an email sent to you from the City.
- On the property's **Details** tab, find the **Unique Identifiers (IDs)** box on the middle of the left side of the page and click **Edit**.
- Under **Standard IDs**, select **Portland, OR Building ID** from the drop-down list and enter your unique identification number, including capital letters and hyphens, in the adjacent ID field. Once entered, click **Save**.

The screenshot shows the 'Details' tab of the Portfolio Manager interface. The 'Unique Identifiers (IDs)' section is highlighted with a red arrow pointing to the 'Edit' button. The section contains the following information:

- Portfolio Manager ID: 4721275
- Custom ID: None
- Standard ID: 1 [view](#)
- Instructions: You can select from Portfolio Manager's Standard IDs to provide information to others in data requests. Or you can create up to three Custom IDs so that you can cross-reference your property in other systems.

The 'Property Uses and Use Details' section shows a table with the following data:

Name	Property Use Type	Gross Floor Area (GFA) (sq. ft.)	Action
Building Use	Office	400,000 sq. ft.	I want to...

Summary statistics for Property GFA:

- Property GFA (Buildings): 400,000 [used to calculate](#)
- Property GFA (Parking): 0

The 'Property GFA by Use' section shows a pie chart with 100% Office. The 'Property Type' section shows 'Office' as the selected type.

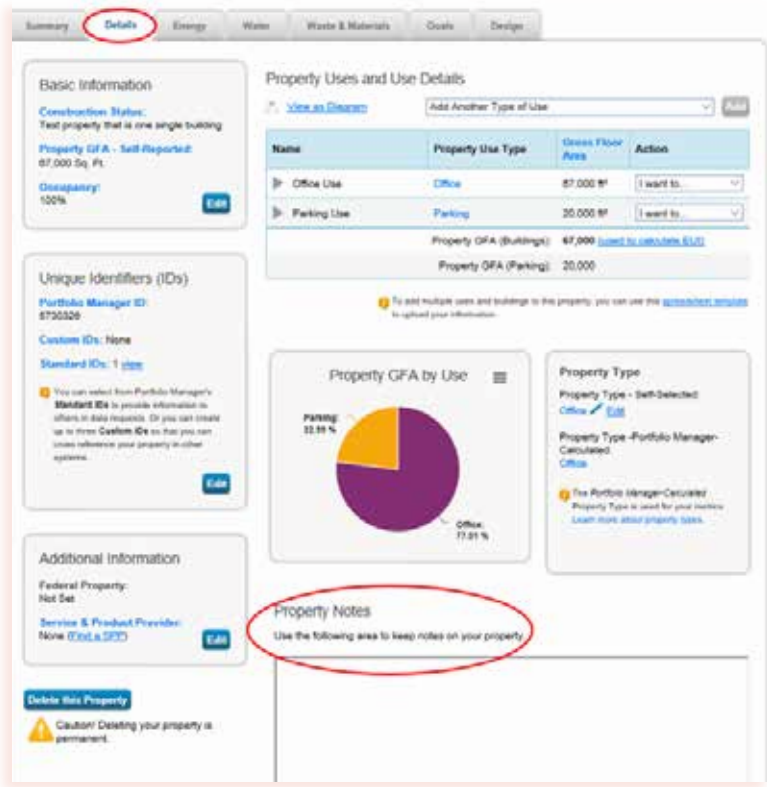
Tip

- **The Portland Building ID is not the same** as the ID that is automatically assigned in Portfolio Manager when you set up a property.
- **A missing or incorrect Portland Building ID** makes it difficult to match your report and determine that your building has met the annual compliance requirements. It will also result in receiving error correction notifications until the ID is corrected.
- **Occasionally, the Portland Building ID assigned to a building may change.** You will be notified by the City if you need to change the ID within your Portfolio Manager account.

Enter Property Notes (optional)

Tell your story! In addition to reporting the required energy performance information, you can provide more details about your building’s energy performance to the City using the **Property Notes** field. The **Property Notes** field is located in the **Details** tab. Any information entered there should be updated annually and will be publicly disclosed on the Commercial Building Energy Performance Map.

» IF YOU DO NOT WANT THIS INFORMATION TO BE PUBLISHED, MAKE SURE THAT THE **PROPERTY NOTES** FIELD IS BLANK.



Building owners may include two types of optional information in the Property Notes section:

- **Building Narrative.** Provided contextual information related to energy use in the building, such as operational changes, energy audits or tenant uses. This information can be useful to describe energy improvements or explain changes in energy consumption from one year to the next. When complete, click **Save Notes**.
- **Portfolio Manager Data Verification.** Ensure your energy performance information is accurate by hiring a licensed professional to verify your building details. Verification lends credibility to a building's publicly reported energy performance data. Any building that is professionally verified or ENERGY STAR certified is highlighted on the Commercial Building Energy Performance Map. Verification will be accepted for any building with an Energy Star score and must be completed by a licensed Professional Engineer (PE) or a Registered Architect (RA). The licensed professional will review all data in the Portfolio Manager profile. Buildings that receive an ENERGY STAR score between 75 and 100 are eligible for ENERGY STAR certification from the U.S. Environmental Protection Agency. Portfolio Manager includes instructions on how to achieve this certification.
- If you select verification, include the following information in the **Property Notes** section:
 1. Type: "VERIFIED."
 2. The name of the person who verified the building's data.
 3. The verifier's organization.
 4. The verifier's email address.
 5. The verifier's recognized license or training credential.
 6. Any unique identification number for the verifier's license or training credential.
 7. When complete, click **Save Notes**.

Tip

The Northwest Energy Efficiency Council maintains a directory of businesses that can help businesses with verification: www.neec.net/portland-benchmarking-providers

Portfolio Manager also publishes a searchable directory of licensed professionals near you that can help with verification: www.energystar.gov/buildings/lp_finder

STEP 5 | Report to the City of Portland annually

» THE CITY OF PORTLAND WILL NOT RECEIVE YOUR ANNUAL REPORT SUBMISSION UNTIL THIS STEP IS COMPLETED IN FULL. YOU MUST FOLLOW THE LINK PROVIDED BELOW TO ADD THE REPORTING TEMPLATE FOR THE CURRENT REPORTING YEAR TO YOUR ACCOUNT. FAILURE TO COMPLETE THIS STEP WILL RESULT IN THE BUILDING BEING OUT OF COMPLIANCE

Review your building information

- Ensure that all required building information and energy data has been added to the building's Portfolio Manager profile.
- Check that the building's required Portland Building ID has been entered correctly, as described in Step 4.
- [Optional] Add Property Notes indicate if the data has been verified, as described in Step 4.

Add the reporting template to your account

- Visit the following web URL: www.portlandoregon.gov/bps/submitenergyreport.
- You will be redirected to Portfolio Manager. If you are not already logged in, you will be prompted to do so. Enter your username and password. Otherwise, you will be taken directly to the **Respond to Data Request** webpage. Review the instructions on the online form.
- In the **About Your Response** section, select whether you are submitting the report for yourself or on behalf of another contact (i.e. you are a third-party energy service provider).
- In the **Your Response** section, select the properties that you will be submitting to satisfy the annual energy performance reporting requirements. If you have multiple buildings to report, you may wish to submit them all at the same time.
- Click **Generate Response Preview**.

About Your Response
Who is this data being submitted on behalf of?
 myself
 someone else

Your Response
Select information to include:
Timeframe: Single Year [▼] 2019 [▼]
Properties: Select Number of Property(ies) [▼]

Submitting Data for Someone Else
Sometimes people delegate their responsibilities for responding to data requests to other people. If you are responding on behalf of someone else, please select their name from your Contacts Book so that they will be attributed to the response.

Previewing Reports
Making selections here will include specific properties and timeframes in your response. You may preview your response before you send it. Portfolio Manager will need to process the preview in order for you to view it. Large responses may take more time to process. Your response preview will be available from the "Templates & Reports" section on the Reporting tool when it is ready.

Generate Response Preview Cancel

- You will be directed to the **Reporting** tab in your Portfolio Manager account. You should now see a file entitled **Data Request: City of Portland Energy Reporting for 2017 Performance Data** response listed under **Templates & Reports**.



- A pink alert box will appear below the **Templates & Reports** heading if any key metrics in your report are missing or incomplete. If this message pops up, click on **Read More** to fix the issues identified.
- Resolve any issues and then update your report by selecting **Generate an Updated Response** from the **Action** drop-down menu on the **Reporting** tab.

Submit your report in Portfolio Manager

- Go to the **Reporting** tab and find the **Data Request: City of Portland Energy Reporting for 2017 Performance Data**. Select **I Want To...Send Response** from the **Action** drop-down menu.
- This will take you to the **Confirm Response to Data Request from Portland Benchmarking** page.
- Add any additional email confirmation recipients and the format of the data you will receive. Note that this does not affect reporting to the City.
- Under **E-Sign Your Data Response**, check the box and enter your Portfolio Manager username and password. Click **E-Sign Response**.

- Once your e-signature has been verified (green check mark), click **Send Data**. Click **Continue** on the pop-up notification to confirm submission.
- Pat yourself on the back! You're done!

All information entered into Portfolio Manager must be retained for at least the most recent three years of reporting. If your building changes ownership, you must transfer all Portfolio Manager information necessary for reporting to the new owner within 30 days. The building's profile can additionally be transferred through Portfolio Manager using the **Transfer Ownership** option under the **Summary** tab. Learn more about this option by visiting the frequently asked questions webpage: www.portlandoregon.gov/bps/article/510210.

Additional Resources

- Learn more about Portfolio Manager: www.energystar.gov/benchmark
- How to improve your score: betterbricks.com/solutions/benchmarking/benchmarking-in-portland-oregon
- Frequently asked questions: www.portlandoregon.gov/bps/article/510210

APPENDIX A | Property Use Details Worksheet

The property types on this optional worksheet are intended to help building owners gather details before setting up their Portfolio Manager property. Please note that this list is not inclusive of every space type option in Portfolio Manager.

For buildings with multiple tenants with the same use (i.e. several offices), enter the tenant spaces as one use, unless the total weekly operating hours among tenants differs by more than 10 hours.

For buildings with multiple tenants with different uses (i.e., retail and offices), gather the information for each major use in the building before you set up the property details.

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 _____

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 _____
 - Number of Open or Closed Refrigeration/Freezer Units _____
- Number of Walk-in Refrigeration /Freezer Units _____
- Percent That Can Be Heated _____
- Percent That Can Be Cooled _____

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 _____

HIGHER EDUCATION FACILITY

- Gross Floor Area _____
- Weekly Operating Hours _____
- Enrollment _____
- Number of Computers _____
- Number of Workers FTE _____
- Percent That Can Be Heated _____
- Percent That Can Be Cooled _____
- Grant Dollars _____

DATA CENTER

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

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 _____

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 _____
- Gym/Fitness Center Floor Area _____

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 _____

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 _____
- Number of Open or Closed Refrigeration/Freezer Units _____
- Number of Walk-in Refrigeration/Freezer Units _____
- 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 _____
- Number of Open or Closed Refrigeration/Freezer Units _____
- Number of Walk-in Refrigeration/Freezer Units _____
- Percent That Can Be Heated _____
- Percent That Can Be Cooled _____

Some space types are not covered by the City of Portland reporting requirements, but will need to be included in Portfolio Manager if they make up less than 50 percent of your covered building's GFA:

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 _____

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 _____

WASTEWATER TREATMENT PLANT

- Gross Floor Area _____
- Plant Design Flow Rate _____
- Average Influent Biological Oxygen Demand (BOD5) _____
- Average Effluent Biological Oxygen Demand (BOD5) _____
- Fixed Film Trickle Filtration Process _____
- Nutrient Removal _____

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 _____

RESIDENCE HALL/DORMITORY

- Gross Floor Area _____
- Computer Lab _____
- Dining Hall _____
- Number of Rooms _____
- Percent That Can Be Heated _____
- Percent That Can Be Cooled _____

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 _____

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 _____

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 _____

APPENDIX B | Tenant data request

Notes to Owner

Sending this letter does not fulfill the City of Portland Energy Performance Reporting requirement. The building owner is responsible for gathering the data, entering it into Portfolio Manager and reporting the data to the City of Portland through Portfolio Manager.

Select your tenant scenario below as a guide to request property information or energy use data from your tenants to complete the building's Portfolio Manager Property profile. Refer to Appendix A for a list of details by use type.

- If the building has **4 or fewer** separately metered tenants, each tenant is required to either provide their utility data or sign a release form authorizing the utility to provide the building owner with aggregate whole building monthly energy consumption data (refer to Step 5 of this guide). Attach the applicable utility provider releases with your information requests.
- If the building has **5 or more** separately metered tenants, the building owner can request aggregate whole building monthly energy consumption by submitting one form for the building.

[Letter Template on next page]

Letter Template

RE: City of Portland Energy Performance Reporting Requirements and Information Request

Dear Tenant,

On April 22, 2015, the Portland City Council adopted a policy that requires us to report our building's energy performance information annually to the City of Portland, and we need your help.

This policy also requires our tenants to provide specific information about your space to us within 30 days of this request letter.

To comply with the requirements, we need the following use details for your tenant space during the last calendar year:

[Insert applicable space type information request from Appendix A]

We also need 12 months of energy consumption for the calendar year from all utility meters serving our building, including your separately metered account.

If you do not have all of your energy use data for the last calendar year, please complete and sign the attached form granting the utility provider permission to release your energy use data. This information will help us to manage building energy consumption and improve performance.

Starting in 2017, the City of Portland makes individual building energy performance information transparent to help inform purchasing and leasing decisions. You can find more information on the City's Energy Performance Reporting Program website:

www.portlandoregon.gov/bps/energyreporting

If you have questions, please contact us or the City of Portland Energy Reporting Help Desk at 503-823-7070 or email energyreporting@portlandoregon.gov.

Thank you for helping us comply with the City's requirements and improve the energy performance of our building.

Sincerely,

Management



www.portlandoregon.gov/bps/energyreporting