

## ENERGY REPORTING HOW-TO GUIDE FOR RETURNING USERS

Was your building's energy performance reported to the City of Portland last year? If so, it's easy to update property details and submit a new report for the 2017 calendar year. **The deadline for submitting your energy report is April 22, 2018.** Each step is also described in greater detail in the City's Energy Reporting How-to Guide for New Users: [www.portlandoregon.gov/bps/article/560330](http://www.portlandoregon.gov/bps/article/560330)

### STEP 1 | Get started

- If you need to change the building's primary contact person for coordinating compliance with the City, use the "Establish/Update a Building Contact" web form: [www.portlandoregon.gov/bps/establishcontact](http://www.portlandoregon.gov/bps/establishcontact).

### STEP 2 | Update your ENERGY STAR® Portfolio Manager® account and property details

- Log into your existing account at [www.energystar.gov/benchmark](http://www.energystar.gov/benchmark).  
*Need password help?* Go to: [portfoliomanager.zendesk.com/hc/en-us/requests/new](http://portfoliomanager.zendesk.com/hc/en-us/requests/new).
- In the upper right corner of Portfolio Manager, click **Account Settings**. Review the name, email and phone number listed. Click **Make Changes** to update this information, if needed. Click on the **ENERGY STAR Portfolio Manager** banner to return to the home page.
- Under the **MyPortfolio** tab, click on the hyperlinked name of the building. Go to the **Details** tab and select the triangle next to each listed property use to show the square footage and other details.
- Significant year-to-year changes in use details must be updated by choosing **I want to... Update with New Information** from the **Action** dropdown menu. On the **Update Page**, enter the new information and effective date of the change (NOT the date you are making the update).
- If your building previously included any default or temporary values, they must be replaced with actual values. In the **Action** dropdown menu, choose **I want to... Correct Mistakes**. From the **History Log**, enter the actual value and uncheck the **Default Value** and/or **Temporary Value?** box. DO NOT change the **Current As Of** date.

### STEP 3 | Check energy meters and update usage data

- Go to the **Energy** tab.
- All in-use (active) meters must have monthly usage data **through at least 12/31/2017** with no gaps or overlapping dates. If your data is not current through 12/31/2017, update your energy usage data using one of two options:

#### OPTION 1 - Manually enter your building's energy use data based on available records.

- Under the **Energy** tab, click on the appropriate meter, and click **Add Another Entry** (below the data table) to input new monthly billing dates and usage to the existing dataset.
- When finished, click **Save Bills**.

## OPTION 2 - Request aggregated whole building data from your utility.

- **Pacific Power** customers can request automated upload of monthly electricity data into Portfolio Manager by visiting [www.pacificpower.net/epe/energy\\_benchmarking.html](http://www.pacificpower.net/epe/energy_benchmarking.html).
  - **PGE & NW Natural** customers can request an aggregated annual building energy use report by visiting [www.portlandgeneral.com/PortlandReporting](http://www.portlandgeneral.com/PortlandReporting) or [www.nwnatural.com/business/benchmarking](http://www.nwnatural.com/business/benchmarking). Save the report to your computer for upload as one electric or natural gas meter. Under the **Energy** tab, click on the appropriate meter. Below the existing data table, click **Browse...** in the **Upload data in bulk for this meter** section. Choose the file from its saved location, and then click **Upload**. Click **Save Bills**.
- On the **Energy** tab, check that the number of **Meters - Used to Compute Metrics** reflects energy data for the whole building. If not, click **Change Meter Selections** and checkmark active (in-use) meters. Then, select **These meter(s) account for the total energy consumption**.

## STEP 4 | Update additional property information

- Under the **Details** tab, find the **Unique Identifiers (IDs)** box. Next to the heading **Standard IDs**, click on the **View** hyperlink and confirm the ID is entered correctly. If the ID is missing or incorrect, click on the **Edit** button to add or correct the Portland, OR Building ID in the Standard ID box and Click **Save**.
- You can choose to enter optional contextual information related to your building's energy use in the **Property Notes** field under the **Details** tab. This could include two types of information:
- A building narrative describing energy improvements or changes in energy consumption.
  - Building profile verification by a licensed professional.
- Once entered, click **Save Notes**. This building narrative will be published by the City annually.
- Make sure that the **Property Notes** field is blank if you do not want this information to be published.

## STEP 5 | Report to the City of Portland

*The City of Portland will not receive your annual report submission until this step is completed in full. Each year you must follow the link below to add the template for the reporting year to your account. Failure to complete this step will result in the building being out of compliance.*

- Visit [www.portlandoregon.gov/bps/submitenergyreport](http://www.portlandoregon.gov/bps/submitenergyreport). You will be taken to the **Respond to Data Request** webpage. Review the instructions on the online form.
- Select whether you are submitting the report for yourself or on behalf of another contact in the **About Your Response** section. Select the properties that you will be submitting for 2017 in the **Your Response** section. Click **Generate Response Preview**.
- Under the **Reporting** tab, find the **Data Request: City of Portland Energy Reporting for 2017 Performance Data** in the Templates & Reports table. Select **I want to..Send Response** from the **Action** drop-down menu.
- 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 is verified (green check mark), click **Send Data**. Click **Continue** on the pop-up notification to confirm submission. You're done!

## QUESTIONS?

Refer to the Energy Reporting How-To Guide ([www.portlandoregon.gov/bps/article/560330](http://www.portlandoregon.gov/bps/article/560330)), or contact the City of Portland Energy Reporting Help Desk at 503-823-7070 or [energyreporting@portlandoregon.gov](mailto:energyreporting@portlandoregon.gov).

