



BOULDER BUILDING PERFORMANCE ORDINANCE

RATING AND REPORTING TRAINING

SPRING 2018

AGENDA

Ordinance Overview

How to Rate & Report

Xcel Energy Resources

Q&A

Individual Assistance





OVERVIEW

BUILDING PERFORMANCE ORDINANCE

www.BoulderBuildingPerformance.com

WHAT DO WE HOPE TO ACCOMPLISH?

Objectives

- ✓ **Reduce** GHG Emissions
- ✓ **Improve** quality of the commercial building stock
- ✓ **Realize** cost effective efficiency
- ✓ **Increase** awareness of building energy performance metrics
- ✓ **Drive** market transformation
- ✓ **Inform** design of future programs and services

Who Benefits



Community
Members



Business Tenants



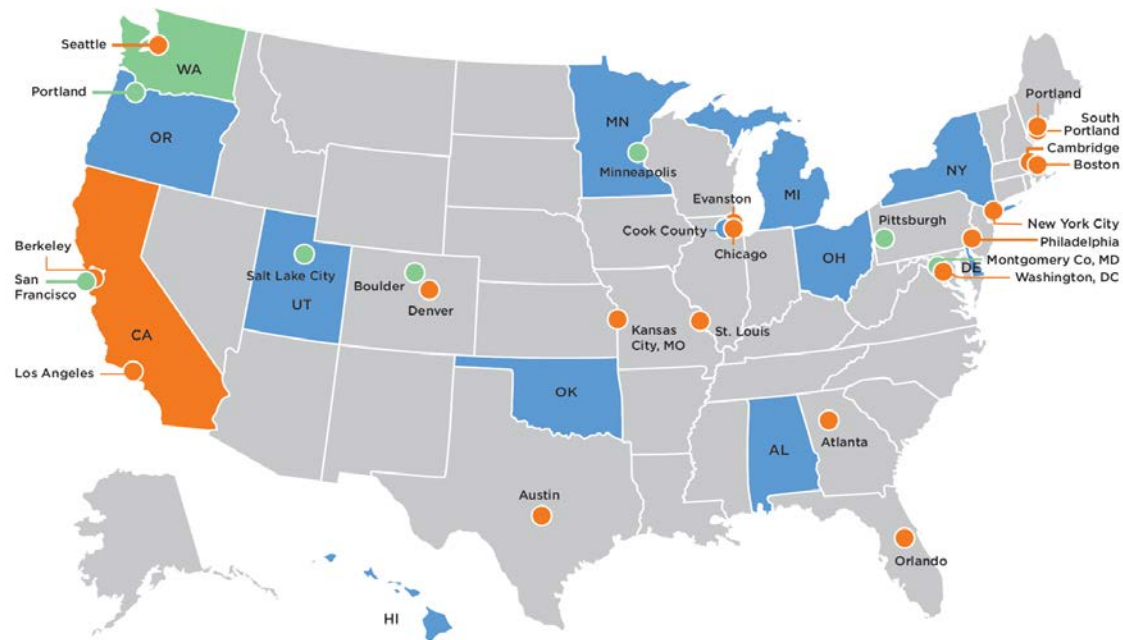
Building Owners



Policymakers

NATIONAL CONTEXT

U.S. Building Benchmarking and Transparency Policies



- Public, commercial, and multifamily building benchmarking policy adopted
- Public and commercial building benchmarking policy adopted
- Public buildings benchmarked

U.S. City Policies: Building Benchmarking, Transparency, and Beyond



- Beyond benchmarking (e.g. retrocommissioning or audit) policy adopted
- Public, commercial, and multifamily policy adopted
- Public and commercial building benchmarking policy adopted
- Public buildings benchmarked

ORDINANCE SCOPE

- Adopted Oct. 2015
- Commercial and Industrial (C&I) Buildings
 - Existing \geq 20,000 sf
 - New* \geq 10,000 sf
 - City-owned \geq 5,000 sf
 - Large Industrial Campuses**



*Any building permitted since the Jan. 2014 energy code update.

**Three or more buildings at least partially used for manufacturing served by a central plant or single utility meter.

REQUIREMENTS*

- 1. Rate and report** energy use annually
 - Publicly disclosed after 2-year grace period
- 2. Energy assessments** every 10 years
- 3. Retrocommissioning (RCx)** every 10 years
 - Implement cost-effective measures within 2 years
- 4. One-time lighting upgrades**

**Large Industrial Campuses have custom requirements.*

RATING AND REPORTING

- Annually report Jan 1- Dec 31 whole-building energy data
 - All electricity and natural gas (even if tenants pay own bills)
- ENERGY STAR® [Portfolio Manager](#) (ESPM)
- Xcel Energy offers [automatic data upload](#)
 - Manually upload third party natural gas



PUBLIC DISCLOSURE



EFFICIENCY REQUIREMENTS

- Energy Assessments
- Retrocommissioning (RCx)
 - Measure Implementation
- Lighting Upgrades

BOULDER BUILDING PERFORMANCE EFFICIENCY REQUIREMENTS

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EFFICIENCY REQUIREMENTS

The Building Performance Ordinance requires each affected commercial and industrial building owner to implement efficiency actions over a phased timeline. These actions are:

1. Perform Energy Assessments Every 10 Years;
2. Implement One-time Lighting Upgrades;
3. Perform Retrocommissioning (RCx) Every 10 Years;
4. Implement Cost Effective RCx Measures.

Timeline

ENERGY ASSESSMENTS

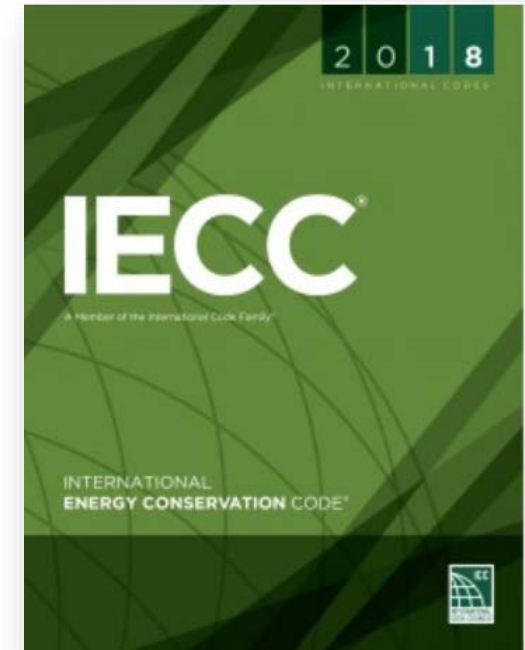
- Must be conducted within 3 years of your first R&R deadline, and every 10 years after
- ASHRAE*-equivalent [energy assessments](#)
 - Buildings < 50,000 sf: ASHRAE **Level I**
 - Buildings ≥ 50,000 sf: ASHRAE **Level II**
- Owners must use a [Qualified Service Provider](#)

RETROCOMMISSIONING (RCX)

- Must be conducted within 5 years of your first R&R deadline and every 10 years after
 - Required scope is outlined in the [City Manager Rules](#) and [How-to Guide](#)
 - Owners must use a [Qualified Service Provider](#)
- Must implement measures with a payback period of ≤ 2 years within two years of study

LIGHTING UPGRADES

- One-time lighting upgrades within 5 years of your first R&R deadline
- Must meet current [IECC](#)*
 - Codes are updated every 3 years
 - Current code is 2018
- Only [specific sections](#) are required:
 - Interior/exterior lighting power
 - Interior/exterior timer switch/on-off controls
 - Occupancy sensors



SERVICE PROVIDERS

■ Energy Assessments and Retrocommissioning

- Must use a qualified service provider
- Qualified providers are listed on the [program website](#)
 - Lighting contractors do **not** have to be on the list

■ Service Providers

- Must complete the online training
- Must meet minimum qualifications



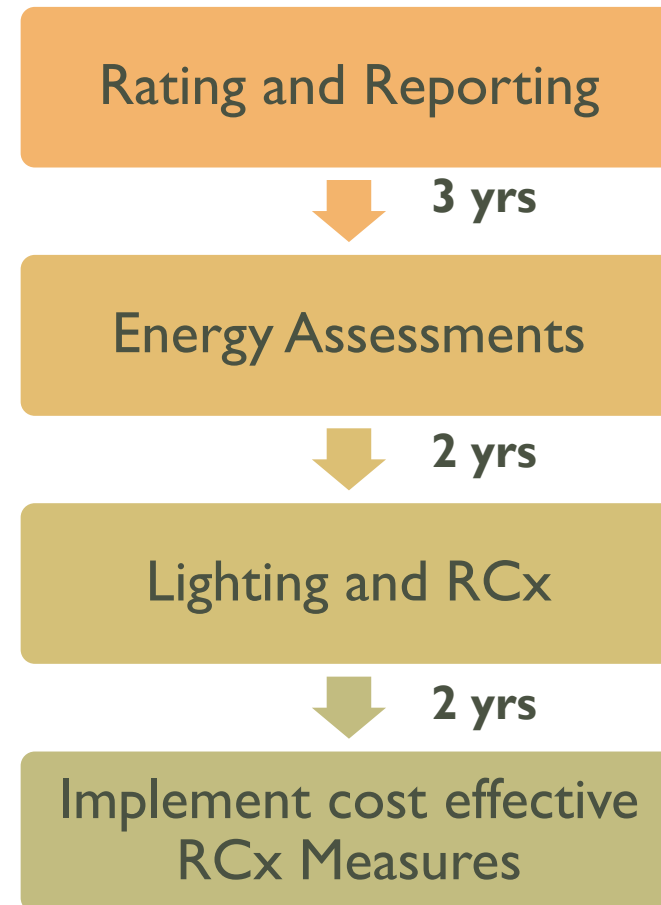
COMPLIANCE SCHEDULE

Start Year

2016 Buildings \geq 50,000 sf
New Buildings \geq 10,000 sf
City Buildings \geq 5,000 sf
Large Industrial Campuses

2018 Buildings \geq 30,000 sf

2020 Buildings \geq 20,000 sf



DEADLINES*

Ordinance Requirement	City Buildings ≥ 5,000 sf	Existing Buildings ≥ 50,000 sf New Buildings ≥ 10,000 sf	Existing Buildings ≥ 30,000 sf	Existing Buildings ≥ 20,000 sf
Rating & Reporting	2016	2016	2018	2020
Public Disclosure	2019	2019	2021	2023
Energy Assessments	2019	2019	2021	2023
Lighting Upgrades	2021	2021	2023	2025
Retrocommissioning	2021	2021	2023	2025
Implement Cost Effective RCx Measures	2023	2023	2025	2027

*All deadlines June 1st

EXEMPTIONS

All Requirements

Unconditioned and unlit buildings
Financial hardship

Rating and Reporting

Less than one year of energy use data

Public Disclosure

Building information includes trade secrets, privileged or confidential commercial information

Energy Assessment

Building received equivalent energy assessment within 10 years of first requirement AND implemented cost-effective actions (payback \leq 5 years)

EXEMPTIONS CONT.

Efficiency Requirements

1. [ENERGY STAR certified](#)
2. LEED Existing Buildings: Operation & Maintenance (EBOM) Certified
3. Building has demonstrated pattern of significant and consistent improvements and can provide all of the following:
 - Records for past 3 years of energy use or emissions
 - Narrative covering how reductions have been achieved and proof of implementation
 - Proof of high efficiency compared to other similar buildings or to your baseline EUI

ENFORCEMENT

■ For owners

- Fines of \$0.0025 per square foot per day (up to \$1,000 per day) of non-compliance.

■ For tenants

- Required to respond to building owner request for information within 30 days of a request.
- Failure to do so will result in similar fines.



RESOURCES

- Webpage
 - www.BoulderBuildingPerformance.com
 - Rules, requirements, deadlines
 - List of current affected buildings
 - Service provider resources
 - Rebates and trainings
 - Compliance map
 - Tools and guidance
- How-to Guides
 - Step-by-step guidance
 - Examples and definitions
 - Templates
- BPO Help Desk
 - BPOHelpdesk@bouldercolorado.gov
 - (844) 811-8785



HOW TO RATE & REPORT

USING ENERGY STAR PORTFOLIO MANAGER

WHAT IS ENERGY STAR PORTFOLIO MANAGER?

- EPA created ENERGY STAR **Portfolio Manager**®, a free online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions.
- It is used to benchmark the performance of one building or a whole portfolio of buildings, compared to a national dataset and to itself year over year.

ENERGY STAR®
PortfolioManager®



ENERGY STAR SCORE

Property Types Eligible to Receive a 1-100 Energy Star Score

- | | |
|-----------------------|------------------------------|
| • Bank Branch | • Non-Refrigerated Warehouse |
| • Barracks | • Office |
| • Courthouse | • Refrigerated Warehouse |
| • Data Center | • Residence Hall/Dormitory |
| • Distribution Center | • Retail Store |
| • Financial Office | • Senior Care Community |
| • Hospital | • Supermarket/Grocery Store |
| • Hotel | • Wastewater Treatment Plant |
| • K-12 School | • Wholesale Club/Supercenter |
| • Medical Office | • Worship Facility |
| • Multifamily Housing | |

Property Types Not Eligible for an Energy Star Score





- | |
|---------------------------------|
| • Mixed Use Properties |
| • Restaurants |
| • Industrial/Manufacturing |
| • Other |
| • Entertainment/Public Assembly |
| • Technology/Science |
| • Etc. |
| |
| |
| |

GETTING STARTED - RESOURCES

- R&R Checklist
- How-To Guide
- Training Slides
- Help Desk

Resources

Help Desk - The city has hired Overlay Consulting to provide Help Desk services to building owners rating and reporting their building energy data for compliance with the Building Performance Ordinance. Help Desk services include assistance using Portfolio Manager, connecting with Xcel Energy's automatic data upload, and applying for exemptions or deadline extensions. **Contact the Help Desk 8am-5pm MDT at BPOHelpdesk@bouldercolorado.gov or (844) 811-8785.**

- [Compliance Checklist](#)  - A list of the Rating & Reporting compliance steps.
- [How-to Guide](#)  - Provides detailed instructions for Rating & Reporting energy data through ENERGY STAR Portfolio Manager.
- [Training Slides](#)  - The city hosted trainings on how to use ENERGY STAR Portfolio Manager to complete Rating & Reporting and the slides are available for reference.
- [ENERGY STAR Portfolio Manager](#) - EPA's free online tool for Rating & Reporting whole-building energy use. The ENERGY STAR [webpage](#) features guidance and trainings on using the tool.
- [ENERGY STAR Energy Tracking Tool](#) - Manufacturing buildings may choose to comply with Rating & Reporting using this tool. Contact the Program Administrator for more information.
- [Using the Energy Tracking Tool](#)  - Instructions for manufacturing buildings to use the Energy Tracking Tool for Rating & Reporting compliance.
- [Xcel Energy Benchmarking Portal](#) - Automatically uploads whole-building energy data directly into ENERGY STAR Portfolio Manager (for energy supplied by Xcel Energy).
- [Deadline Extension Request](#) - Deadline extensions may be available. Submit the request online for review.
- [Exemption Request](#) - Rating and Reporting exemptions may be available if a building is unconditioned and unlit; has operated less than a year based on the Certificate of Occupancy; or has proof of financial hardship.

GETTING STARTED

Step 1:

Create an Account in Energy
Star Portfolio Manager

ENERGY STAR®
ENERGY STAR **PortfolioManager**®

Help
Language: [English](#) | [Français](#)

Welcome to Portfolio Manager
Helping you track and improve energy efficiency across your entire portfolio of properties.

Username: *

Password: *

[I forgot my password.](#)
[I forgot my username.](#) **Sign In**

Create a New Account

[ENERGY STAR Buildings Homepage](#)

[Take a Training](#)

[Learn More About Portfolio Manager](#)

These links provide more information from ENERGY STAR and are not available in French.

You are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and subject to criminal and civil penalties. Use of the system indicates consent to monitoring and recording.

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GETTING STARTED

Step 1:

Create an Account in Energy Star Portfolio Manager

- Create password
- Fill in some basic information about yourself, company, or business

The screenshot shows the 'Create an Account' page for Energy Star Portfolio Manager. The page has a teal header with the Energy Star logo and 'PortfolioManager' text. In the top right corner, there are links for 'Help | Login' and 'Language: English | Français'. The main content area is divided into two sections: 'Accessing Your Account' and 'About Yourself'. The 'Accessing Your Account' section contains three input fields: 'Username', 'Password', and 'Confirm Password'. A note below the password field states: 'Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.)'. The 'About Yourself' section contains six input fields: 'First Name', 'Last Name', 'Job Title', 'Email', 'Confirm Email', and 'Phone'. Below the 'Confirm Email' field is a note: 'Note: We never share your email address with third parties.' At the bottom of this section is a 'Country' dropdown menu with 'Select Country' as the current selection. On the right side of the form, there are two informational boxes. The first is titled 'Getting Started' and contains the text: 'Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.' The second box is titled 'Accounts for Organizations' and contains the text: 'If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division'. Above the 'Getting Started' box is a link: 'Already have an account? [Sign In Here](#)'. The page number '26' is visible in the bottom right corner.

ENERGY STAR®
PortfolioManager®

Help | Login
Language: English | Français

Already have an account? [Sign In Here](#)

Create an Account

Accessing Your Account

Username: *

Password: *

Confirm Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: * Select Country

Getting Started

Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.

Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

ADD YOUR PROPERTY

Step 2:

Add Your Property

- Activate your Portfolio Manager account and log in
- From the home screen, select “Add a Property”

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top, the logo for ENERGY STAR Portfolio Manager is visible, along with a welcome message for 'Westhoven' and links for Account Settings, Notifications, Contacts, Help, and Sign Out. Below the logo, there are navigation tabs for MyPortfolio, Sharing, Reporting, and Recognition. The main content area is divided into two sections. On the left, under 'Properties (0)', the 'Add a Property' button is highlighted with a red circle. Below this, the 'Manage Portfolio' section lists several actions: 'Upload and/or update multiple properties', 'Download your entire portfolio to Excel', 'Set a portfolio baseline and/or target', and 'Add sample properties'. On the right, a message states that the user currently has no properties and provides two options: 'Set up your first property' and 'Add up to five sample properties', each with a corresponding icon.

ENERGY STAR® PortfolioManager®

Welcome Westhoven: [Account Settings](#) | [Notifications](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | Sharing | Reporting | Recognition

Properties (0)
Add a Property

Manage Portfolio

- [Upload and/or update multiple properties](#) at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.
- [Download your entire portfolio to Excel](#) or create a [custom download](#).
- [Set a portfolio baseline and/or target](#) to help measure progress.
- [Add sample properties](#) to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.

You currently do not have any properties within your Portfolio Manager account. You can set up your first property or add up to five sample properties with pre-populated data to your portfolio. If this is your first time using Portfolio Manager, you may want to add sample properties to your portfolio in order to test out available features and see the look of a complete property.

[Set up your first property.](#)

[Add up to five sample properties](#)

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ADD YOUR PROPERTY

Step 2:

Add Your Property


- Select your Property Type
- Number of Buildings
- Construction Status



Welcome Westhoven: [Account Settings](#) | [Notifications](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!




Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

[Learn more about Property Types.](#)




Your Property's Buildings

How many physical buildings do you consider part of your property?

None: My property is part of a building
 One: My property is a single building
 More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?



Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

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.
 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.
 Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

[Get Started!](#) [Cancel](#)

Tip
To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

Tip
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.

Test Properties
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](#).

SETTING UP YOUR PROPERTY

Step 3:

Setting Up Your Property

- Address
- Year Built
- Gross Floor Area
- Occupancy

The screenshot shows the 'Set Up a Property: Basic Property Information' form in the Energy Star Portfolio Manager interface. The form is titled 'About Your Property' and includes the following fields:

- Name: * [Text input]
- Country: * [Dropdown menu: --- Select ---]
- Street Address: * [Text input]
- City/Municipality: * [Text input]
- State/Province: * [Dropdown menu: --- Select ---]
- Postal Code: * [Text input]
- Year Built: * [Text input]
- Gross Floor Area: * [Text input] [Sq. Ft. ▼] Temporary Value
- Irrigated Area: [Text input] [Sq. Ft. ▼]
- Occupancy: * [Dropdown menu: Select ▼] %

A tip box on the right side of the form states: 'The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.'

The page number 29 is visible in the bottom right corner.

SETTING UP YOUR PROPERTY - GROSS FLOOR AREA

Include in GFA	Don't Include in GFA
<ul style="list-style-type: none">• Lobbies	<ul style="list-style-type: none">• Exterior Spaces
<ul style="list-style-type: none">• Tenant Areas	<ul style="list-style-type: none">• Balconies
<ul style="list-style-type: none">• Storage Rooms	<ul style="list-style-type: none">• Patios
<ul style="list-style-type: none">• Common Areas	<ul style="list-style-type: none">• Exterior Loading Docks
<ul style="list-style-type: none">• Laundry Rooms	<ul style="list-style-type: none">• Driveways
<ul style="list-style-type: none">• Meeting Rooms	<ul style="list-style-type: none">• Crawl Spaces
<ul style="list-style-type: none">• Elevator Shafts	<ul style="list-style-type: none">• Covered Walkways
<ul style="list-style-type: none">• Stairwells	<ul style="list-style-type: none">• Parking
<ul style="list-style-type: none">• Restrooms	<ul style="list-style-type: none">• Outdoor Courts (Tennis, Basketball, etc.)
<ul style="list-style-type: none">• Mechanical Equipment Areas	<ul style="list-style-type: none">• Interstitial Plenum Space Between Floors
<ul style="list-style-type: none">• Basements	
<ul style="list-style-type: none">• Atriums (only count the base level)	

SETTING UP YOUR PROPERTY – PARKING

Step 3:

How to Account for Parking

- The ENERGY STAR tool is intended to assess the efficiency of the building, not its parking lot.
- If its sub-metered, then parking may be excluded.
- If its not sub-metered, the parking square footage should be included as a separate use type

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name:

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

Year Built:

Gross Floor Area: Temporary Value
Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. [Details on what to include.](#)

Irrigated Area:

Occupancy: %

Do any of these apply?

My property's energy consumption includes parking areas

My property has a Data Center that requires a constant power load of 75 kW or more

My property has one or more retail stores

My property has one or more restaurants/cafeterias

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

Tip

The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

Tip







Answering these simple questions will help us guide you in entering your property correctly.

SETTING UP YOUR PROPERTY

Step 4:

Adding Property Use Details

- You will be asked specific questions regarding gross floor area, weekly operating hours, number of workers on the main shift, etc.
- Data collection worksheets for tenants

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 20,000 <input type="text"/> Sq. Ft. ▾	1/1/2000 	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2000 	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2000 	<input type="checkbox"/>
★ Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2000 	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text"/> ▾ <input type="checkbox"/> Use a default	1/1/2000 	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> ▾ <input type="checkbox"/> Use a default	1/1/2000 	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

MyPortfolio [Sharing](#) [Reporting](#) [Recognition](#)


Congratulations! You have successfully created your property.

Next, you can:

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

Portfolio Manager Property ID: [REDACTED]
 Year Built: 2000

[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](#)

2.

1.

Summary [Details](#) [Energy](#) [Water](#) [Waste & Materials](#) [Goals](#) [Design](#)

Property Profile ([Future enhancements](#))

This section will be deleted in 2018, except for the property photos which will remain. [More information.](#)

[+ Create Profile](#)





Source EUI Trend (kBtu/ft²)

3.



[Change Metrics](#)
[Change Time Periods](#)

Metrics Summary

Metric 	Not Available (Energy Baseline) 	Not Available (Energy Current) 	Change 
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO ₂ e/ft²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

SETTING UP YOUR PROPERTY – ADDING THE REPORTING ID

Step 5:

Adding Your Building's Reporting ID

- Within the “Details” tab, go to the “Unique Identifiers (IDs)” box and select “Edit”.
- Under “Standard IDs” select “Boulder Energy Reporting ID”, enter your five digit ID and click “Save”.

The screenshot displays the 'Details' tab of a property management software interface. The 'Unique Identifiers (IDs)' section is highlighted with a red circle around the 'Edit' button. The 'Property Uses and Use Details' table shows 'Office Use' with a Gross Floor Area of 20,000 ft². The 'Property Type' section shows 'Office' as the self-selected type.

Name	Property Use Type	Gross Floor Area	Action
Office Use	Office	20,000 ft²	I want to...
Property GFA (Buildings):		20,000 (used to calculate EUI)	
Property GFA (Parking):		0	

Property GFA by Use: Office: 100%

SETTING UP YOUR PROPERTY – ADDING ADDITIONAL USE TYPES

Step 6 (Case Specific):

Adding Additional Use Types

- In the “Details” tab you can add additional use types or edit your existing use type details

The screenshot displays the 'Details' tab of a property management system. The 'Property Uses and Use Details' section is highlighted with a red circle, showing a dropdown menu with 'Add Another Type of Use' selected and an 'Add' button. Below this is a table with columns for Name, Property Use Type, Gross Floor Area, and Action. The table contains one entry for 'Office Use' with a Gross Floor Area of 20,000 ft². Below the table, there is a note about using a spreadsheet template to upload information. To the left, the 'Basic Information' section shows 'Construction Status: Existing property that is one single building', 'Property GFA - Self-Reported: 20,000 Sq. Ft.', and 'Occupancy: 100%'. The 'Unique Identifiers (IDs)' section shows 'Portfolio Manager ID' and 'Custom IDs: None'. The 'Property GFA by Use' section shows a pie chart for 'Office: 100%'. The 'Property Type' section shows 'Property Type - Self-Selected: Office' and 'Property Type -Portfolio Manager-Calculated: Office'.

Name	Property Use Type	Gross Floor Area	Action
Office Use	Office	20,000 ft²	I want to...

Property GFA (Buildings): 20,000 (used to calculate EUI)

Property GFA (Parking): 0

Office: 100 %

CREATING METERS & ENTERING WHOLE BUILDING ENERGY DATA

Step 7:

Creating Energy Meters

- In the “Energy” tab you will need to create the building’s energy meters

The screenshot displays the 'Energy' tab of a software interface. At the top, there are navigation tabs: Summary, Details, Energy (selected), Water, Waste & Materials, Goals, and Design. The main content area is divided into several sections:

- Meter Summary:** Shows '0 Energy Meters Total' and a message: 'In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.' It includes a blue link 'Add A Meter' and a 'Current Energy Date' of 'Not Available'. A blue button 'Enter Your Bills' is located at the bottom right of this section.
- Meters - Used to Compute Metrics (0):** Features a blue button 'Add A Meter' circled in red and a blue link 'View as a Diagram'.
- Informational Message:** A red exclamation mark icon is followed by text: 'There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. Enter information about your energy meters to begin tracking energy usage. After entering the meter, you will need to choose to include it in your metrics.' Below this is a link: 'For a step-by-step guide to entering meter data, see How to get Utility Data into Portfolio Manager.'
- Four Ways to Enter Bill Data:** An information icon is followed by a list:
 1. Manually
 2. Use our [simple spreadsheet](#) (one meter) to upload or Copy/Paste
 3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)
 4. [Find an organization](#) to electronically enter your data into Portfolio Manager

CREATING METERS & ENTERING WHOLE BUILDING ENERGY DATA



Sources of Your Property's Energy

What kind of [energy](#) do you want to track? Please select all that apply.

- Electric
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Coal (anthracite)
- Coal (bituminous)
- Coke
- Wood
- Kerosene
- Fuel Oil (No. 1)
- Other:

[Get Started!](#) [Cancel](#)



Welcome Westhoven: [Account Settings](#) | [Notifications](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

About Your Meters for [REDACTED]

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 Overlay (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	1/1/2017	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	1/1/2017	<input checked="" type="checkbox"/>		<input type="checkbox"/>

[X Delete Selected Entries](#)

[+ Add Another Entry](#)

[Back](#)

[Create Meters](#) [Cancel](#)

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[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

CREATING METERS & ENTERING WHOLE BUILDING ENERGY DATA

Step 8:

Adding Energy Data

Three ways to enter energy data for your property or portfolio:

1. Manually
2. Portfolio Manager Excel Spread Sheet Templates
3. Xcel Energy Auto Upload

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later.

Your Meter Entries for [REDACTED]

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

3 Energy Meter(s) for Overlay

▼ Natural Gas

	Start Date	End Date	Usage terms	Total Cost (\$)	Estimation
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

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

Upload data in bulk for this meter:

You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

► Electric Grid Meter

The screenshot shows a web interface for entering energy data. A red circle highlights the first row of the table, which contains input fields for Start Date, End Date, Usage terms, Total Cost (\$), and Estimation. Another red circle highlights the 'Upload data in bulk' section, which includes a help message and an 'Upload' button.

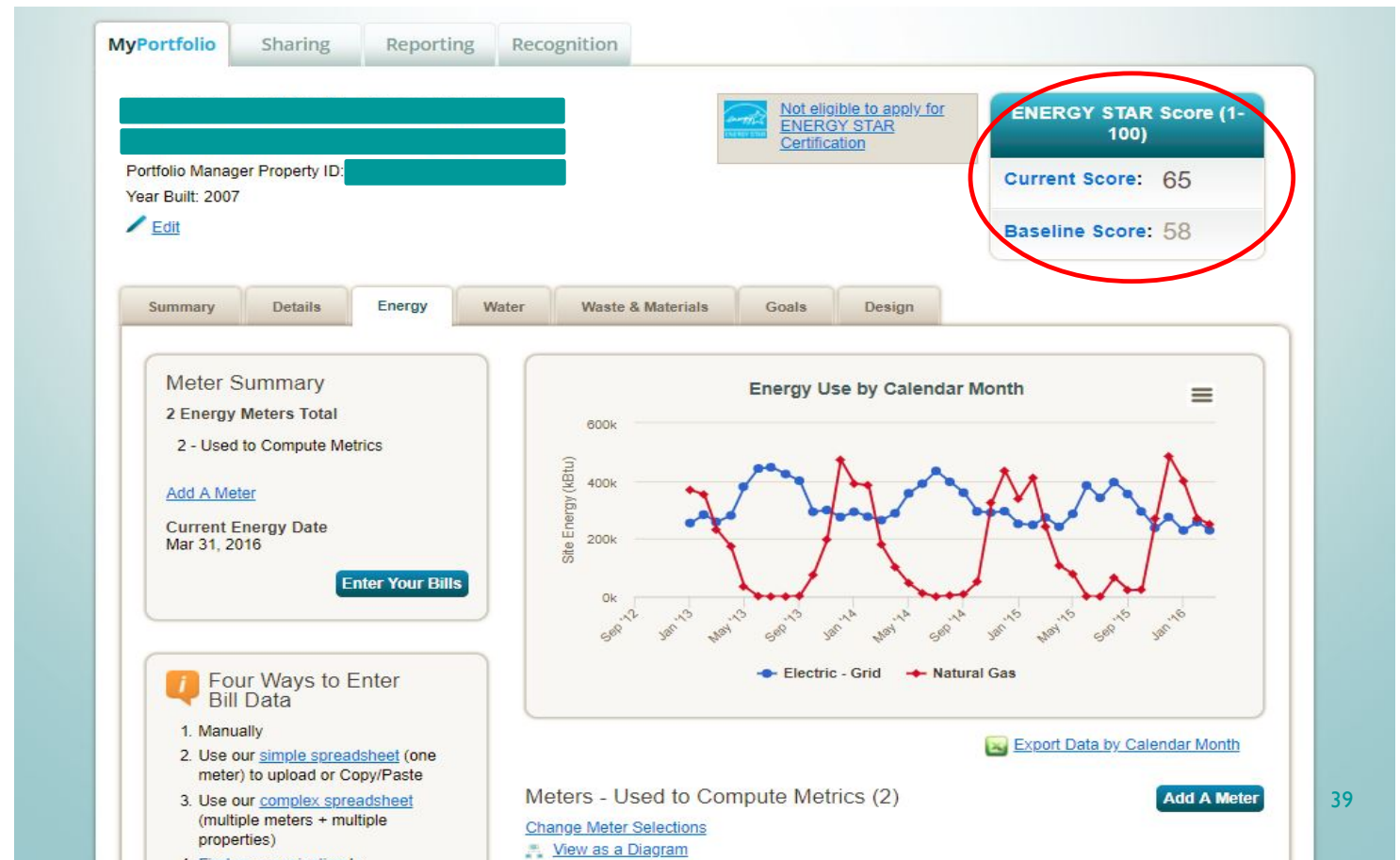
CREATING METERS & ENTERING WHOLE BUILDING ENERGY DATA

Step 8:

Adding Energy Data

Three ways to enter energy data for your property or portfolio:

1. Manually
2. Portfolio Manager Excel Spread Sheet Templates
3. Xcel Energy Auto Upload



WHAT IF YOU DON'T SEE AN ENERGY STAR SCORE OR EUI

MyPortfolio | Sharing | Reporting | Recognition

Portfolio Manager Property ID: [REDACTED]
Year Built: 2000
[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 | Energy | Water | Waste & Materials | Goals | Design

Basic Information

Construction Status:
Existing property that is one single building

Property GFA - Self-Reported:
20,000 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
▶ Office Use	Office	20,000 ft ²	I want to... <input type="text"/>
Property GFA (Buildings):		20,000 (used to calculate EUI)	
Property GFA (Parking):		0	

Why Not Score?

Your property does not have a score for the current year, therefore the weather-normalized source EUI is the best way to evaluate your energy performance, both against the national median and by comparing your current and baseline periods.

Reason for no score:

- 1) Insufficient data for Baseline or Current Date

Problem: You do not have 12 full months of data from which to establish a current or baseline period. There are 5 possible reasons why:

- You have gaps
- You have overlaps
- Your "Date Meter became Active" is AFTER some of your bills, so those bills are ignored
- Your "Date Meter became Inactive" is BEFORE some of your bills, so those bills are ignored
- You haven't entered [12 full calendar months](#) of data

Here is a list of all of your meters (these do NOT all necessarily have errors):

- [Natural Gas](#)
Active from 01/01/2017 to present
No Meter Entries Have Been Entered
- [Electric Grid Meter](#)

Property GFA (Parking): 0

DATA QUALITY CHECKER

Step 9:

Run the Data Quality Checker

- This is a built-in tool in Portfolio Manager that runs a set of basic data checks to identify potential data entry errors.
- Common alerts include temporary values, default values, less than 12 months of data, etc.

MyPortfolio | Sharing | Reporting | Recognition

Portfolio Manager Property ID: [Redacted]
Year Built: 2000
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/ft²)
Current EUI: N/A
Baseline EUI: N/A

Summary | Details | Energy | Water | Waste & Materials | Goals | Design

Property Profile ([Future enhancements](#))
This section will be deleted in 2018, except for the property photos which will remain. [More information](#).
[+ Create Profile](#)

Source EUI Trend (kBtu/ft²)

Total GHG Emissions Trend (Metric Tons CO₂e)

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Check for Possible Data Errors

Run a check for any 12-month time period to see if there are any possible errors found with your data.

[Check for Possible Errors](#)

DATA QUALITY CHECKER

Step 9:

Run the Data Quality Checker

- Set the “Year Ending” to “December 31, 2017” and click “Run Checker”
- This will pull up alerts for data that is incomplete or missing as well as how to correct the issue

The screenshot shows the 'Data Quality Checker' interface. At the top, there are navigation tabs: 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main heading is 'Data Quality Checker for [redacted]'. Below this, a text box explains the tool's purpose: 'The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your year of interest, review your alerts, and follow the links to view or correct your data as needed.'

The 'Select Timeframe & Run Checker' section contains a 'Year Ending:' label, a dropdown menu set to 'Dec 31', another dropdown set to '2017', and a 'Re-Run Checker' button. A red circle highlights the 'Dec 31' dropdown, the '2017' dropdown, and the 'Re-Run Checker' button.

Below this, an alert box with a red exclamation mark icon states: 'There is not 12 full months of meter data.' The problem description reads: 'Problem: The following meters do not have 12 full calendar months of meter entries for the year selected (01/01/2017 - 12/31/2017).'

- [Natural Gas](#) (missing bills for 01/01/2017 - 01/01/2018)
- [Electric Grid Meter](#) (missing bills for 01/01/2017 - 01/01/2018)

The 'What to do:' section includes: 'If you think this is a mistake, click the links above to review the entries for each meter and make corrections if necessary.'

Below the alert box, there are two expandable alert boxes:

- ▶ **Property has no waste or material meters.**
- ▶ **Property has no water meters.**

A 'Cancel' link is located at the bottom right of the alert box.

On the right side of the interface, there are two informational sections:

- About Timeframes:** 'The Data Quality Checker needs one full calendar year of Property Use Details and meter information for most checks. Otherwise, we will show you basic alerts to let you know what's missing.'
- About Alerts:** 'Indicates data is incomplete or missing. Most likely at least some metrics are not able to be calculated as a result. Issue should be resolved as soon as possible.' and 'Indicates data is atypical for the type of property and its associated use. Data should be checked for errors to ensure metrics are correct for the property.'

At the bottom of the page, 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'.

SUBMITTING YOUR DATA TO THE CITY

Step 10:

Submit your Energy Report

- To comply with the Building Performance Ordinance you must manually submit your energy report to the city through Portfolio Manager every year

CITY OF BOULDER COLORADO

Calendar | Jobs | Maps | Contact Us

Apr 11 - Fair and Windy, 72°

SEARCH

Home | I Want To... | A to Z | Government | Environment | Trails and Recreation

SOLAR HOME | ENERGY FUTURE | CLIMATE COMMITMENT | BOULDER BUILDING PERFORMANCE | WATER CONSERVATION

Home » Sustainability » Boulder Building Performance

BOULDER BUILDING PERFORMANCE

Boulder Building Performance Program

Program Updates

- Rating and Reporting Trainings are taking place in April. [RSVP](#) to reserve your spot or get more information at [Trainings](#).
- City of Boulder commercial and industrial buildings 30,000 SF and larger must rate and report in 2018.
- The [2018 Affected Building List](#) has been posted.
- [Claim your building](#) to identify or update a main point of contact to receive notices, training invitations and additional information on compliance.
- The Rating and Reporting Help Desk is now available. Send your questions on rating and reporting to (844) 811-8785 or BPOHelpdesk@bouldercolorado.gov

Related Video

Boulder Building Performance Resources

- [Boulder Building Performance](#)
- [2018 Affected Building List](#)
- [Claim Your Building](#)
- [Submit 2017 Energy Report to City](#)
- [Rating and Reporting](#)
- [Efficiency Requirements](#)
- [Training and Rebates](#)
- [Service Providers](#)
- [City Facilities: Efficiency Efforts](#)
- [Energy Efficiency Financial Incentives for Businesses](#)
- [Energy Loans From Elevations Credit Union](#)
- [Xcel Energy Incentives](#)

SUBMITTING YOUR DATA TO THE CITY

Step 10:



Submit your Energy Report

- After generating a response preview, you will need to send the response
- You will then be asked to electronically sign your report by entering your Portfolio Manager login information and clicking “E-Sign Response.” You have signed successfully when you see a green alert with a checkmark
- Click “Send Data”

Templates & Reports (9)

Create a New Template

 Your new response preview(s) has been generated.

Name	Status	Action
 Data Request: City of Boulder Building Performance Program (Request from Kimberlee Rankin)	 Response Preview Generated: 1/26/2016 4:36 PM	I want to Edit Properties and Timeframe Preview Response Download Preview in Excel Generate an Updated Response Send Response Delete Response
 ENERGY STAR Certification Status	Generated: 7/16/2015 7:56 PM	
 Energy Performance	Generated: 7/16/2015 5:53 PM	

3 E-Sign your Data Response

I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Kimberlee Rankin with City of Boulder.

Your username:

*

Your password:

*

 Signed

[Send Data](#)

[Cancel](#)

HELP DESK INFORMATION

- Hours of Operation: Monday – Friday 8am-5pm
- Phone Number: 844-811-8785
- Email: BPOHelpdesk@bouldercolorado.gov
- Website: boulderbuildingperformance.com



XCEL ENERGY RESOURCES

BENCHMARKING PORTAL

THANK YOU!

QUESTIONS?



www.BoulderBuildingPerformance.com
BPOHelpdesk@bouldercolorado.gov
844-811-8785



REFERENCE SLIDES



REQUIREMENTS: LARGE INDUSTRIAL CAMPUSES

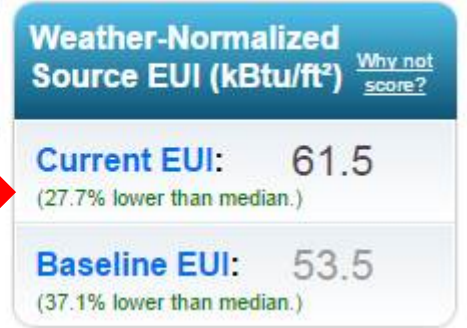
- Annually
 - Report aggregate energy data
 - Publicly disclosed after 2 years
- One Time
 - Lighting Upgrades
- Every 10 years
 - Level II Energy Assessments
 - Implement measures with payback < 1 year

EXEMPTION EXAMPLES

My 60,000 sf building received an Xcel energy assessment in 2015. Can that replace my energy assessment requirement?

- No. This building is required to conduct an ASHRAE Level II-equivalent energy assessment because of its size (50,000 sf and up). Xcel's assessment does not meet this equivalency.
- However, after you complete your 2016 rating and reporting, if you can show that implementing the measures Xcel found in its energy assessment can achieve a 15% reduction in your energy-use intensity by the 2019 energy assessment deadline, you could be exempt.

EXAMPLE 2



My building recently underwent a renovation/lighting upgrade – do I still need to comply?

- You are still required to rate and report.
- However, you may be exempt from the other requirements. After completing your rating and reporting:
 - Are you eligible for ENERGY STAR Certification? That would exempt you from all efficiency requirements
 - Is your EUI in the top 25% of similar buildings? That could exempt you from all efficiency requirements
 - Does the current lighting in the building comply with IECC 2015 requirements? If so, you can submit proof of this to satisfy the lighting requirement. However, you would still be subject to all other requirements.

EXAMPLE 3

I am eligible for ENERGY STAR certification from my recent rating and reporting submission. Now what?

- You are required to continue rating and reporting. However, if you complete the certification process you can submit an exemption request from all efficiency requirements.
- You must maintain the certification to maintain the exemption. If your score falls below the certified range (below 75) at your next R&R submission, you must get a (free) Level I energy assessment from PACE and have that year to bring the score back up. If your score has not achieved the certified range at the next R&R submission, the exemption will no longer be valid and you must comply with all future efficiency requirements.

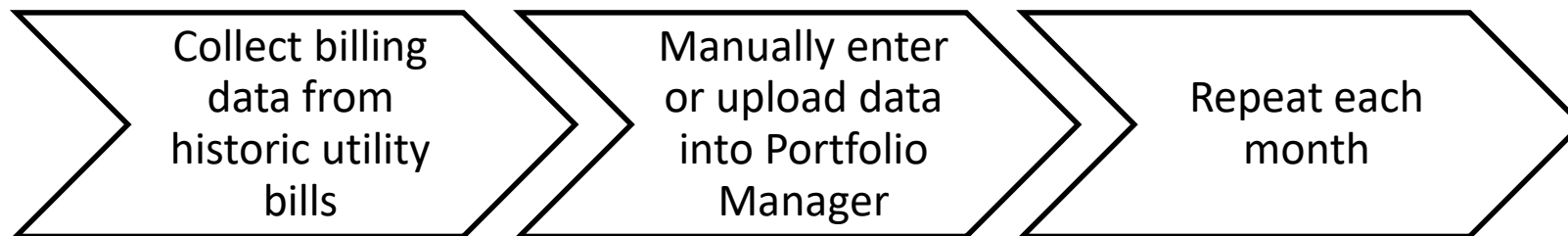


Energy Benchmarking Services

Q2 2018



How it's worked in the past:



■ Inconsistent availability of tenant data

■ Error-prone

■ Time, resource intensive

■ Time, resource intensive

■ Time, resource intensive

Xcel Energy Solution Overview

- **Free, easy access** tool for **whole-building** energy consumption data



	Start Date	End Date	Usage kWh (thousand Watt-hours)
<input type="checkbox"/>	5/1/2015	5/31/2015	856,876.35
<input type="checkbox"/>	6/1/2015	6/30/2015	956,597.6
<input type="checkbox"/>	7/1/2015	7/31/2015	857,553.29
<input type="checkbox"/>	8/1/2015	8/31/2015	918,058.89



- Initial Upload = **36 months** of history
- Ongoing Upload = every month thereafter

New Process Walkthrough

Steps 1 – 3 are in Energy Star Portfolio Manager

<https://portfoliomanager.energystar.gov/pm/>

- Step 1:
 - Create an account in Portfolio Manager
- Step 2:
 - Create a property in Portfolio Manager
- Step 3:
 - Create Meters in Portfolio Manager

Account Setup

Account Connection

Connect Properties

Building Owner Verification

Tenant Identification

Data Privacy

Auto-Upload

Ongoing Upload

Download the user guide

Minnesota Customer Support

Xcel Energy Billing & Payment Start, Stop, Transfer **Programs & Rebates** Outage & I

Home / Programs and Rebates / Business Programs & Rebates / New Construction and Whole Building / Energy Benchmarking

Energy Benchmarking

Energy benchmarking is a key energy management best practice that enables you to identify the energy performance of your building(s), invest strategically in energy efficiency upgrades and monitor effectiveness of energy improvements. Benchmarking is the process of comparing measurements against a standard, average or best practice with the purpose of improving current practice and moving toward the use of best practices.

What's included?

We are providing a direct feed of whole-building energy usage data from our metered data repository into ENERGY STAR Portfolio Manager®. After you complete the initial connection steps, we will update your data on a monthly basis so you can focus on the important part – saving energy.

Get Started

[Download the User Guide](#)

www.xcelenergy.com/energybenchmarking



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Create an Account in the Xcel Energy Portal

repository into ENERGY STAR Portfolio Manager®. After you complete the initial connection steps, we will update your data on a monthly basis so you can focus on the important part – saving energy.

Get Started

[Download the User Guide](#)

1. Set up an account with ENERGY STAR Portfolio Manager® along with the properties that you'd like to benchmark.
2. Once you have that set up, log in to the Xcel Energy Benchmarking Portal to establish the energy data connection.
3. Log back into ENERGY STAR Portfolio Manager® and connect your account with Xcel Energy.

What next?

With your benchmarking data, you can identify energy efficiency opportunities. Here are a few resources to help make targeted improvements.

Account Setup

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Create an Account in the Xcel Energy Portal

Connecting to our Energy Benchmarking service

Step 4 Set up an account in the Xcel Energy Benchmarking portal

Xcel Energy Benchmarking portal: <https://xcelenergy.force.com/benchmarking>

1. Click on *Sign Up*.



2. Enter your information.

A screenshot of the 'Let's get started' registration form. The form is titled 'Let's get started' and is divided into two main sections: 'About you' and 'About your company'.
About you
- First Name: [Text Input]
- Last Name: [Text Input]
- Your Role: [Dropdown Menu] (Facility Owner is selected)
- Email: [Text Input]
Choose wisely! This email address will be your account contact key with us in ENERGY STAR Portfolio Manager.®
About your company
- Company Name: [Text Input]
- Phone: [Text Input]
- Physical and Mailing Address: [Text Input]
- City: [Text Input]
- State: [Dropdown Menu] (AL is selected)
- Zip Code: [Text Input]
- Country: [Dropdown Menu] (United States is selected)
- Submit: [Submit Button]

Once you have clicked Submit, you will receive an email from noreply@benchmarking.com indicating you need to log in and change your password.

3. Click on the e-mail link you received from Xcel Energy and log in to the portal.

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Connect your Portfolio Manager Account with Xcel Energy's

Step 5 Back in Portfolio Manager, connect your account with Xcel Energy

1. In Portfolio Manager, click on *Contacts*.

Welcome dq82285: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

2. Click on *Add Contact*.



3. Under contact username, type: **XCELENERGYWEBSERVICES** and click on *Search*.

Find Contact in Portfolio Manager
Search using any of the criteria below:

Name:	<input type="text"/>
Organization:	<input type="text"/>
Username:	<input type="text" value="XCELENERGYWEBSERVICES"/>
Email:	<input type="text"/>

4. When the contact shows up, click on *Connect*.

Xcel Energy
Web Services Account with Xcel Energy

Account Setup

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Connect your Portfolio Manager Account with Xcel Energy's

5. Type in your log-in email you set up for the Xcel Energy Benchmarking portal. (You must use the same email address used to create your account in Step 4, on page 6 of this user guide.) Then agree to Terms of Use by checking the box.

Xcel Energy Portal User name:
Xcel Energy Portal Username: 1 - 50 Characters

Terms of Use

By connecting with Xcel Energy, you agree to:

- 1) not disclose whole building energy use data except for the purposes of building benchmarking, identifying energy efficiency projects, and energy management;
- 2) take appropriate administrative, technical, and physical safeguards to protect the whole building data from any unauthorized use or disclosure to protect the data from unauthorized access, destruction, use, modification, or disclosure;
- 3) only use the whole building energy use data for the purposes of building benchmarking, identifying energy efficiency projects, energy management, and complying with laws or ordinances;
- 4) not attempt to determine an individual utility customer's energy use from the whole building energy use data and not to use the information to contact the subject of the information;
- 5) not use the whole building energy use data for a secondary commercial purpose.

I agree to my provider's (Xcel Energy) Terms of Use.

6. Click on *Send Connection Request*.

Send Connection Request

7. Xcel Energy will notify you via email when your account connection request has been received and connected. **Allow 30 minutes.**
8. When the email arrives, log back in to your Portfolio Manager account.

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Connect your Portfolio Manager Account with Xcel Energy's

From: No Reply Benchmarking <noreplybenchmarking@xcelenergy.com>

Date: January 18, 2017 at 10:00:02 AM CST

To: "drew@ewb-mn.org" <drew@ewb-mn.org>

Subject: Account connected!

Congratulations! You've successfully connected with Xcel Energy's Web Services Account in Portfolio Manager®, which means you're one step closer to receiving an automated feed of whole-building energy data for all of your properties.

What's next?

- 1) If you're not already logged in to your Portfolio Manager account, go ahead and log back in: <http://portfoliomanager.energystar.gov/>
- 2) In Portfolio Manager®, share the properties and associated electricity and/or natural gas meters with us
- 3) Wait for notification from us to complete your initial setup

You can also see details of your progress throughout the initial connection phase in Xcel Energy's Benchmarking Portal at this link:

<https://xcelenergy.force.com/benchmarking/0010B00001oQuiE>

Stuck? Shoot us an email at benchmarking@xcelenergy.com

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Share your properties and meters with Xcel Energy

Step 6

8. Give full access to property information as well as all Xcel Energy delivered fuel meters**
If you do not share with full access, Xcel Energy will not be able to update your property.

Select the permission level below that you would like to grant Xcel Energy for each category.

Category	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Land Meter Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Electric Core Meter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Natural Gas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grids, Improvements, & Checkoffs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integrations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. Make a selection regarding "Share forward."
(This gives Xcel Energy permission to share the property with others). If you're participating in an Xcel Energy program or plan to at some point in the future, this may be beneficial, but is not required.
10. Click on *Apply Selections and Authorize Exchange*.

Apply Selections and Authorize Exchange

11. Scroll down, and click on *Share Property(ies)*.

Share Property(ies)

12. Verify *Sharing Requests* have been sent.
Your sharing notifications will automatically appear in the Sharing Notifications section of the Sharing Tab under your Portfolio Manager account.

Sharing Notifications (3) View All

<- Ben_Doc_Test - Sharing request sent to Xcel Energy	Clear
<- Natural Gas - Sharing request sent to Xcel Energy	Clear

13. Xcel Energy retrieves connection requests.
When Xcel Energy has retrieved the share requests, they will be automatically accepted and an email will be sent to you. **Allow 30 minutes.** If your requests were declined for any reason, go back to Step 6 and ensure that the appropriate permission levels have been set for both the Property and Meters.

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Xcel Energy Verifies your Relationship with the Property Owner

Step 7 Back in Portfolio Manager, connect your account with Xcel Energy

We require that if anyone other than the building owner is requesting data on the building owner's behalf, that requester needs to obtain authorization from the building owner before proceeding. If you are the building owner, this step will not require any action from you. If you are not, this authorization can be completed using the customer energy usage data release forms found at the following link: xcelenergy.com/DataConsent

Use the following instructions when completing the consent form:

- 1) Specify your (the third party's) contact information, including identifying a contact person who the customer may contact with questions related to the data release request.
- 2) Describe the purpose(s) of the proposed use of customer energy usage data. Be sure to include Energy Benchmarking in your description of the purpose.
- 3) Provide the consent form to the customer of record and have the customer enter their account number, service address and name in the customer section of the consent form, and sign and date the form.
- 4) Submit the completed release request consent form to Xcel Energy, by sending an email to datarequest@xcelenergy.com and copying benchmarking@xcelenergy.com. Invalid or incomplete forms will be returned, and their request for information release will not be honored.



Xcel Energy identifies the tenants in your building and maps them to the meters you created in Portfolio Manager

Step 8 Xcel Energy will compile your tenant list

This may take up to five business days, depending on the complexity of the building. We will send you an e-mail if we get stuck. No action is required of you at this stage.



Step 9 Tenant to meter matching

We will make an initial attempt to match tenants to the meters you shared in Step 3. If we have any questions, we'll reach out to you.

The system will analyze the configuration to see if individual customer consent forms are required. At this point, you will receive an email from us indicating one of the following:

- a. Individual tenant consent is required (Step 10)
- b. Consumption data was successfully published to your Portfolio Manager account (Step 11)

If you need to adjust the tenant list for any reason, create a task for Xcel Energy within the Benchmarking Portal.

- a. Scroll down to open activities and click on **New Task**
- b. Fill out the form, click on **Send**.

Open Activities	New Task
No records to display	

We will contact you if we have any additional questions.

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Upload

Step 10 Work through consent process

Note that if you chose option 1 when setting up your meters, this step may not apply to you. Depending on the number of tenants in your building, you may require consent from individual tenants.

1. Receive notification from Xcel Energy telling you that consent forms are required from one or more tenants.
 1. Click on the link embedded in the notification email to download a copy of the customer consent form.
 2. Complete the consent form with the required tenants according to the directions in Step 7.
 3. Email consent form to benchmarking@xcelenergy.com
2. Xcel Energy will validate the consent form and notify you if more information is needed.



Xcel Energy applies its data privacy rules to the specific tenant combinations in your building

From: No
Date: Janu
To: "drew/
Subject: T

Due to the you to take

1) Obtain
 a. First, f
<https://xcel>
 b. Obtain
<http://www>
 c. Attach forms" butt

2) If poss how you'd

Need help,

CUSTOMER CONSENT FORM CEUD
 PAGE 2 MI | MN | ND | NM | SD | TX | WI

(1) REQUESTOR INFORMATION:

Requesting entity name: _____, we'll need
 Contact person: _____
 Physical & mailing address: _____
 Phone: _____ Fax: _____
 Email: _____

CONSENT TO RELEASE CUSTOMER ENERGY USAGE DATA

(2) We – the entity identified above – have asked you to authorize Xcel Energy to disclose your Customer Energy Usage Data to us so that we may:

Provide you with products or services you requested Offer you products/services that may interest you
 Determine your eligibility for an energy program Analyze your data
 Other (specify): _____

(3) INFORMATION WE ARE REQUESTING
 We are requesting access to your Customer Energy Usage Data, which is specific information that Xcel Energy collects from your utility meter (check all service types that apply):

Electric Natural Gas Steam

Xcel Energy's standard report of Customer Energy Usage Data contains monthly usage information. Depending on the type of utility meter

consent
and explain





Initial Data Transfer

Fr Da To Su Wi If: coi As htt Ot Th Xc	<input type="checkbox"/>	3/1/2014	3/31/2014	228,139.11		<input type="checkbox"/>	<input type="checkbox"/>	1/11/2017 XCELENERGYWEBSERVICES	k or
	<input type="checkbox"/>	4/1/2014	4/30/2014	201,326.34		<input type="checkbox"/>	<input type="checkbox"/>	1/11/2017 XCELENERGYWEBSERVICES	
	<input type="checkbox"/>	5/1/2014	5/31/2014	205,362.24		<input type="checkbox"/>	<input type="checkbox"/>	1/11/2017 XCELENERGYWEBSERVICES	
	<input type="checkbox"/>	6/1/2014	6/30/2014	196,222.37		<input type="checkbox"/>	<input type="checkbox"/>	1/11/2017 XCELENERGYWEBSERVICES	
	<input type="checkbox"/>	7/1/2014	7/31/2014	198,587.09		<input type="checkbox"/>	<input type="checkbox"/>	1/11/2017 XCELENERGYWEBSERVICES	
	<input type="checkbox"/>	8/1/2014	8/31/2014	204,648.74		<input type="checkbox"/>	<input type="checkbox"/>	1/11/2017 XCELENERGYWEBSERVICES	
	<input type="checkbox"/>	9/1/2014	9/30/2014	197,722.54		<input type="checkbox"/>	<input type="checkbox"/>	1/11/2017 XCELENERGYWEBSERVICES	
	<input type="checkbox"/>	10/1/2014	10/31/2014	207,740.41		<input type="checkbox"/>	<input type="checkbox"/>	1/11/2017 XCELENERGYWEBSERVICES	
	<input type="checkbox"/>	11/1/2014	11/30/2014	204,968.72		<input type="checkbox"/>	<input type="checkbox"/>	1/11/2017 XCELENERGYWEBSERVICES	

Your Property is: [Edit](#)

- A Single Building
- Part of a Building
- A Campus of Multiple Buildings

Electric Grid Meter Common 24323226	Electric - Grid	11/30/2016	Yes
Electric Grid Meter Residential 24323227	Electric - Grid	11/30/2016	Yes
Natural Gas Common 25158945	Natural Gas	11/30/2016	Yes



Ongoing Data Transfer

From: No Reply Benchmarking <noreplybenchmarking@xcelenergy.com>
Date: June 7, 2016 at 2:24:36 AM CDT
To: "quirk.drew@gmail.com" <quirk.drew@gmail.com>
Subject: We've added new data for Buckley Housing in Portfolio Manager®!

S

We just finished adding new energy data for Buckley Housing. Log in to [Portfolio Manager®](#) to see your updated metrics.

S

If you're ready to take the next step in saving energy and money, take a look at the programs available to you through Xcel Energy. Follow this [link](#) or contact your Account Manager or call a representative from the Business Solutions Center at 1-800-481-4700.

S

As always, you're able to check in on the status of your connection and property setup in Xcel Energy's Benchmarking Portal at this link:
<https://xcelenergy.force.com/benchmarking/a52U0000000XZb8>

S

Other questions? Shoot us an email at benchmarking@xcelenergy.com

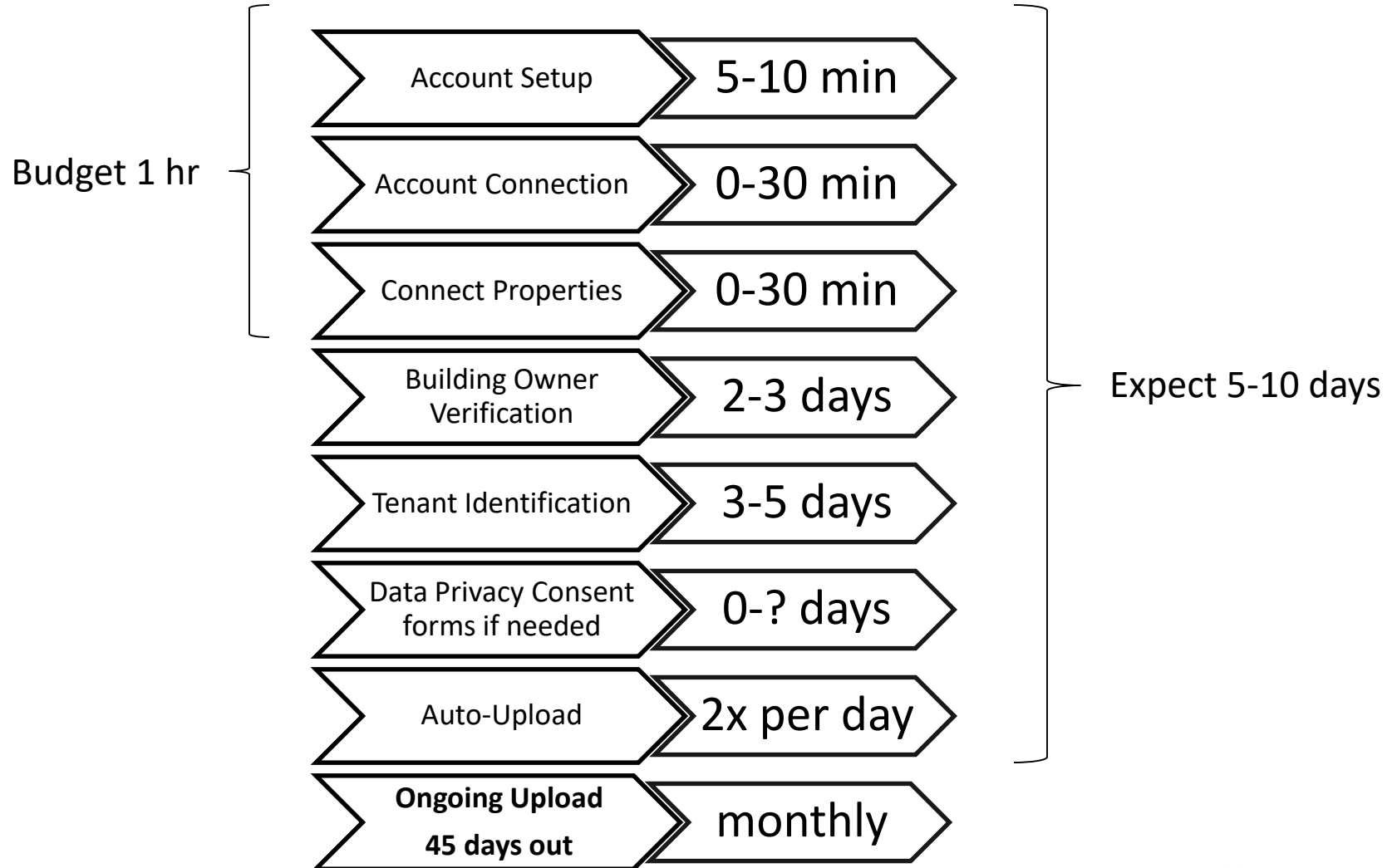
S

Thanks,

Xcel Energy

S

Setup Process Recap



Current System Limitations

- Xcel Energy delivered fuels only (although Portfolio Manager can be used for others)
- Only energy data (kWh, therms) at this time
- Only actual consumption (not solar production) at this time
 - **Have you changed natural gas providers?**
- From a Transport provider to Xcel Energy: Have monthly natural gas data automatically uploaded to your account from Xcel Energy (Recommended). [xcelenergy.com/energybenchmarking](https://www.xcelenergy.com/energybenchmarking)
- From Xcel Energy to a Transport provider: You must now manually add your natural gas data to your Portfolio Manager account. Xcel Energy's auto-upload feature will no longer work for your natural gas data.

On-Site Energy Audit through Xcel Energy

- **Energy Analysis on-site energy audit** – Xcel Energy sends an energy advisor to your facility to conduct a comprehensive on-site energy audit, which is a comprehensive audit of your facility's lighting, heating, cooling, and motors and drives equipment.
- You receive a detailed report including energy conservation opportunities and the associated cost, savings, payback and available rebates.
- Available to electric and gas customers in Colorado.
- Select your building size below.
 - \$125 – building size <50,000 square feet
 - \$250 – building size 50,000–150,000 square feet
 - \$500 – building size >150,000 square feet

How to sign up

1. Call your Account Manager or Business Solutions Center Representative
2. 855.839.8862 or email: energyefficiency@xcelenergy.com
3. Fill out an application (available online)
4. An Energy Advisor will call to schedule a walk-through

The screenshot shows the 'Energy Audits and Assessments' application form on the Xcel Energy website. The form is titled 'Energy Audits and Assessments' and includes the Xcel Energy logo. Below the title, it says 'Start here to save your business money and energy'. The form is divided into several sections: 'Energy audits - choose one', 'Additional energy assessments (an application required)', and 'Business customer information'. The 'Energy audits' section has two main options: 'Energy Analysis (on-site energy audit)' and 'Recommended Non-Building Envelope audit'. Each option has a list of building sizes and corresponding checkboxes. The 'Business customer information' section includes fields for company name, service address, mailing address, and contact person. The form also includes a 'Type of service provided by fuel energy' section with checkboxes for electric, natural gas, and both electric and natural gas. The form is designed to be filled out online and submitted to Xcel Energy.

FAQs

Getting started

Are you able to aggregate / sum up all the electricity data for the building?

Yes, we can aggregate all of the tenant meters for you into one “whole-building” meter in Portfolio Manager. Refer to Step 3 in our [Energy Benchmarking User Guide](#) for more information.

How do I get started?

Visit our [website](#) as well as the steps outlined in the [Energy Benchmarking User Guide](#). If you have any questions along the way, email us at benchmarking@xcelenergy.com.

What are the data privacy rules to access data?

First, we need to verify that you have a relationship with the building owner. If you are not the building owner, we will need to get you authorized on the building owner’s Xcel Energy account at the property. This can be done by completing a consent form with the building owner as the customer of record. Alternatively, the building owner can contact Xcel Energy at 1-800-481-4700 and have them request to add you as an authorized contact on their account.

Once this step is complete, we also have protections on the energy usage data. If you are requesting whole building energy data for a property with multiple Xcel Energy customers, as long as there are more than three tenants and as long as no individual tenant uses more than 50% of the building’s energy in a given month, no further consent forms are needed. If either of these conditions is not met, or if you are looking specifically for individual tenant data, you will need to have consent forms signed by those tenants.

Consent forms and instructions for filling them out can be found at the following link:

https://www.xcelenergy.com/billing_and_payment/customer_data_&_privacy/customer_energy_usage_data_release_forms

FAQs

Account Connection Stage

How do I connect to the service?

Take a look our [website](#) as well as the steps outlined in the [Energy Benchmarking User Guide](#). After you complete those, we'll be able to automatically transfer the data you need into your ENERGY STAR account.

How do I connect my Portfolio Manager Account with Xcel Energy's?

Take a look at Step 5 in the [Energy Benchmarking User Guide](#). This guide should be a helpful resource for you as you go step-by-step through the connection process.

Account connection was declined

Review Steps 1-5 in the [Energy Benchmarking User Guide and try again. Be sure that you have created an account in the Xcel Energy Benchmarking Portal before attempting to connect with us in ENERGY STAR Portfolio Manager.](#)

What is the Xcel Energy Portal Username?

The Xcel Energy Portal Username is the email address that you used to sign up for the [Xcel Energy Benchmarking Portal](#). Review steps 1-5 in the [Energy Benchmarking User Guide for more information.](#)

I set up an account in Xcel Energy's portal, but I didn't receive the password reset email

Go the [login page](#) again and click the "forgot your password" link and follow the steps there to see if it gets you back on the right track. We can sort this out for you on the back end if that doesn't work.

FAQs

Consent Forms

I am not the building owner – what do I need to do?

Complete a consent form with the building owner to become authorized on their accounts. Use the consent forms at the following link:

https://www.xcelenergy.com/billing_and_payment/customer_data_&_privacy/customer_energy_usage_data_release_forms

Where can I find consent forms?

Consent forms and instructions for filling them out can be found at the following link:

https://www.xcelenergy.com/billing_and_payment/customer_data_&_privacy/customer_energy_usage_data_release_forms

Why is consent required?

We take customer privacy and confidentiality interests seriously. If you are requesting whole building energy data for a property with multiple Xcel Energy customers, as long as there are more than three tenants and as long as no individual tenant uses more than 50% of the building's energy in a given month, no consent forms are needed. If either of these conditions is not met, or if you are looking specifically for individual tenant data, you will need to have consent forms signed by those tenants.

Consent forms and instructions for filling them out can be found at the following link:

https://www.xcelenergy.com/billing_and_payment/customer_data_&_privacy/customer_energy_usage_data_release_forms

How do I fill out a consent form?

Please reach out to the team at datarequest@xcelenergy.com for help with your consent form.

[Alternatively, reach out to the data request team at datarequest@xcelenergy.com to help the customer out. If you have experience with the consent form process and can answer the customer's question, do that as well.]

FAQs

Consumption Data

Gas Transportation Customers

If you receive your natural gas from a third-party provider, we are not currently able to transfer this data to Portfolio Manager for you. Please work directly with your third-party provider in order to access this information.

District Steam and Chilled Water Customers


If you receive district steam and chilled water, we are not currently able to transfer this data to Portfolio Manager for you. Please work directly with your district steam and chilled water provider to access this information.

*for Xcel Energy district steam and chilled water customers, configure your meters in Portfolio Manager as follows:

District Service	Meter Type	Units
Steam	District Steam	kLbs. (thousand pounds)
Chilled Water	District Chilled Water from an electric-driven chiller	ton hours

District Steam Bill

OTHER RECURRING CHARGES DETAILS

DESCRIPTION		CHARGE
Steam Billing Period	02/01/17 - 02/28/17	
		
Meter 2031		
Consumption	1440	
Peak Day Mlb	120	
Service & Facility Chrg		\$200.00
Steam Capacity Charge	120 Mlb x \$40.000000	\$4,800.00
Steam Consumption Charge	1440 Mlb x \$6.602000	\$9,506.88
Steam Cost Adj	1440 Mlb x \$8.679000	\$12,497.76
GRSA		\$4,616.09
Franchise Fee	3.00%	\$948.62
Sales Tax		\$1,188.78
Total		\$33,758.13

FAQs

Onsite Solar or Wind Generation Customers

For customers with a solar photovoltaic (PV) system or wind turbine, Xcel Energy currently is not able to transfer the electricity generation data to Portfolio Manager for you. Please refer to your Xcel Energy billing statements to access this information. Note that Xcel Energy will transfer the gross electricity provided to the site from the grid under the Electric Grid Meter in Portfolio Manager. You will need to create an additional Electric Solar Meter or Electric Wind Meter for the onsite generation system and enter the production data for that system with that meter. More information can be found at <https://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-technical-reference-green-power>

What energy units do meters need to be set to?

Units for electricity are kWh and units for gas are Therms.

FAQs

- I've received energy data in my Portfolio Manager account. Why don't the start and end dates line up with my energy bills?
 - We allocate energy usage from each tenant's individual readings across the months spanned in that reading. This allows us to add up multiple tenants' usage and avoid double-counting any energy.
- My energy data doesn't go up until the last month. Why is that?
 - To account for meter reading schedules, we only post energy consumption data for months that are at least 45 days in the past. On average, you will see data up to two months into the past.
- I have energy data for all my Xcel Energy meters. How do I get data for fuels not served by Xcel Energy?
 - Visit <http://www.energystar.gov/buildings/tools-and-resources/how-get-data-portfolio-manager> for more information.