Annual Update Steps - 2018 Data Reporting

If your building reported to the City of Seattle last year, follow these steps to confirm energy meters and property details are updated through Dec. 31, 2018 by the July 1, 2019 deadline — even if signed up for automated energy use updates from utilities.

1. Get Started
   - For password help, go to: https://portfoliomanager.zendesk.com/hc/en-us/requests/new

2. Check Energy Meters and Update
   - On My Portfolio, select Property Name, then Energy tab.
   - All in-use (active) meters must have a most recent bill date through at least 12/31/2018 with no gaps or overlapping dates. Check automated update status (if enrolled):
     - ELECTRIC: If data is not updated through at least 12/31/2018 or has gaps, email scl_portfolio_manager@seattle.gov or call 206-684-7557.
     - GAS (PSE MYDATA): If data is not updated through at least 12/31/2018, email mydata@pse.com or call at 425-424-6486. If not enrolled, go to www.seattle.gov/energybenchmarking, click on How to Comply, Enroll in PSE MyData.
     - STEAM: If missing data, call Enwave (Seattle Steam) at 206-623-6366.
   - On the Energy tab, check that the # of “Meters-Used to Compute Metrics” equals the # of in-use meters. If not, click “Change Meter Selections” and checkmark active (in-use) meters. Then select, “These meter(s) account for the total energy consumption.”

3. Update Property Details
   - On the Details tab, select the triangle next to each property use to show the square footage and other property details.
   - Default or temporary values must be corrected with actual values. Select the Action menu and choose, “I want to… Correct Mistakes.” In the History Log, enter the actual value and uncheck “default value” box. DO NOT change Current as of Date.
   - Significant changes in use must be updated. From the menu choose, “I want to… Update with New Information.” On the Update Page, enter the new information and the effective date of the change, NOT the date you are making the update.

4. Update Account Contact Info
   - In the upper right corner of Portfolio Manager, click Account Settings. If changed, update the name, email and phone. Click Make Changes.

5. Check for EUI & ENERGY STAR Score
   - On the Summary tab, look for the building’s Site EUI for Current (Dec 2018).
   - The ENERGY STAR score should also be listed (if available) for your property type, such as Office, Multifamily (20+ units), Retail, Hotel. (See Appendix A of How to Guide.)
6. Update City of Seattle Property Share

Confirm “read only” share with City of Seattle Annual Reporting and share any new meters. **DO NOT change any utility sharing unless instructed to do so by utilities.**

- Go to the **Sharing Tab** and select **Share (or Edit Access to) a Property.**
- Select **property(ies) and account**, **City of Seattle Annual Reporting (SEATTLE.GOV)**.
- For **Choose Permissions** select, “Personalized Sharing & Exchange Data.” **Continue.**
- On the next screen, select “Edit” under **Exchange Data**.

- On the **Access Permissions** page, do not change the Benchmarking Building ID if already listed (this number is 1-5 digits and is not the Portfolio Manager Building ID). If empty, email EnergyBenchmarking@Seattle.gov or call (206) 727-8484 to obtain.

- **IMPORTANT:** Select Access Permissions as follows:
  - Property Information: **Read Only**
  - All Meter Information: **Read Only**
  - Goals, Improvements & Checklists: **Read Only**
  - Recognition: Leave as **None**

- Scroll down. For **Share Forward**, select “No”.
- **Click Apply Selections & Authorize Exchange.**
  If you selected multiple properties to share, select **Exchange Data button** again, update access permissions to read only, and authorize connection for each property.

- This will open the **Sharing** window again. Click on the **Share Property(ies)** button to finish.
- **Portfolio Manager** should display the message in a green box, “You have successfully shared/edited access to your property(ies)...”

7. Confirm Compliance & Accuracy

- Compliance can be confirmed on the new **Seattle Energy Benchmarking Compliance Portal** (www.seattle.gov/energybenchmarking under “News”). Follow these steps to check your status:
  - To find your building(s), you’ll need your Seattle OSE Building ID or your Portfolio Manager user name. **Click on Search by OSE Building ID or Search by User Name** to get started.
  - Enter your ID or user name in the search field and results will appear in the **Search Results** Section.
  - Once you find your building(s), look for the current reporting **status**.

- **It is the responsibility of the building owner on record to confirm accurate annual compliance.** Reports with unusually low or high (outlier) EUIs or other errors will be flagged for accuracy and required to make corrections and verify accounts.

www.seattle.gov/EnergyBenchmarking

EBR-20K-3.16.2019