

ANNUAL UPDATE STEP: ENROLL IN PSE MYDATA

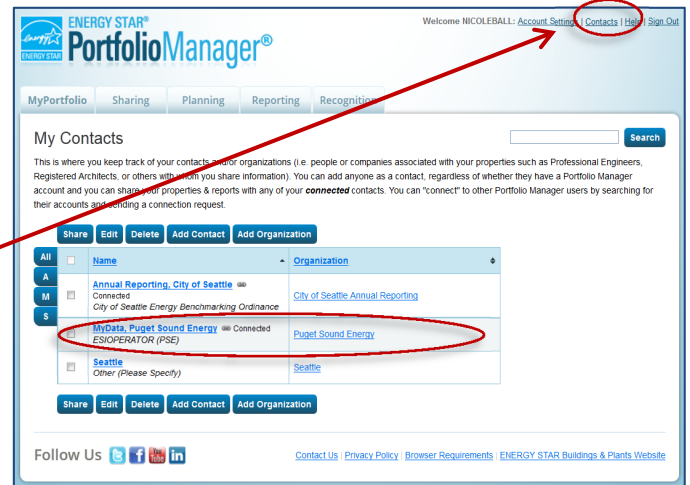
These instructions show how to enroll in Puget Sound Energy's (PSE) MyData to update your buildings natural gas usage. Once enrolled, PSE MyData will also provide automated monthly uploads of gas usage.

CITY OF SEATTLE HELP DESK

- EnergyBenchmarking@Seattle.gov
- (206) 727-8484 (M-F, 8-5)

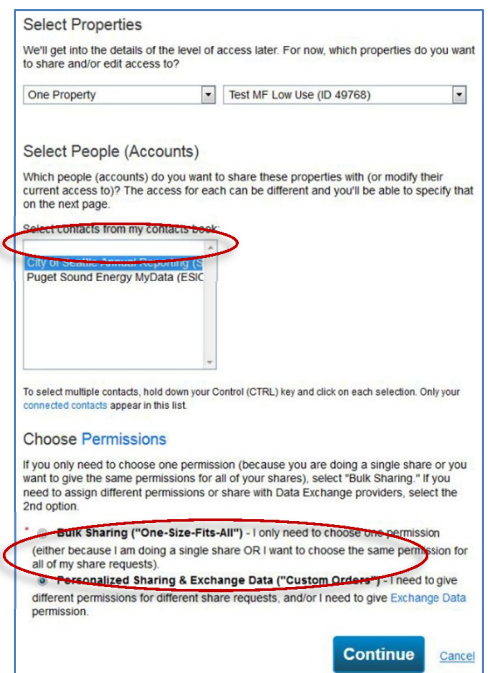
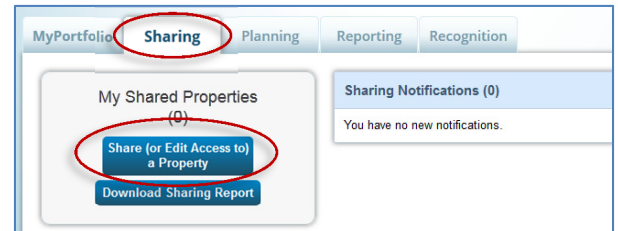
A. Connect with PSE

1. Login into your **Portfolio Manager** account at www.energystar.gov/benchmark.
2. Check if **Puget Sound Energy MyData** is already a contact, by clicking on **Contacts** in the upper right corner of the **MyPortfolio** page.
3. On the **My Contacts** page, check if **MyData, Puget Sound Energy** is listed as **Connected**.
4. If **MyData, Puget Sound Energy** is connected, go to **Step B** below. *If not:*
 - Click **Add Contact**. Enter **ESIOPERATOR** as the Username & click Search.
 - From the list, locate **Puget Sound Energy MyData**. Click **Connect**.
 - Accept Terms of Use & click **Send Connection Request**.
PSE should accept the connection in about an hour or less.

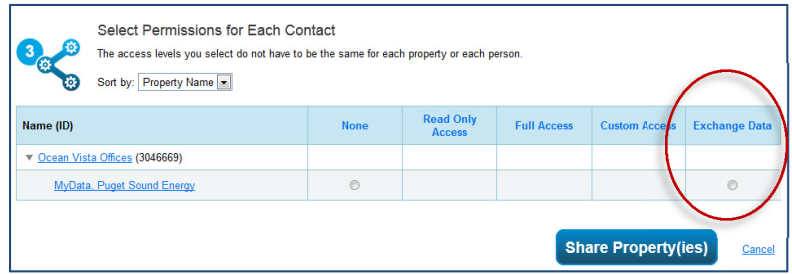


B. Share the Property with PSE

1. Please do this step, even if you already shared the property with PSE. Go to the **Sharing Tab** and click on **Share (or Edit Access to a Property)**.
2. Select the **property(ies)**.
3. Select contact, **MyData, Puget Sound Energy**. (If you need PSE data for more than one property, you may choose "Multiple Properties" in this step.)
4. Under **Choose Permissions**, select the second option, "Personalized Sharing & Exchange Data." **Click Continue**.
5. **Click Continue**.



- On the next screen, select the **Exchange Data** button, which will pop-up the Access Permissions window. Follow **Step C** below to set the access permissions.



C. Set PSE MyData Access Permissions

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

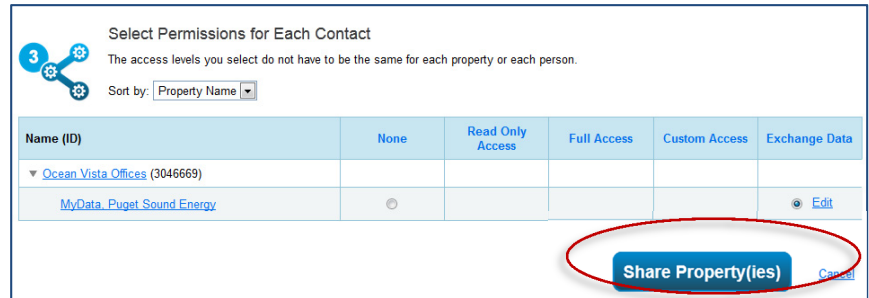
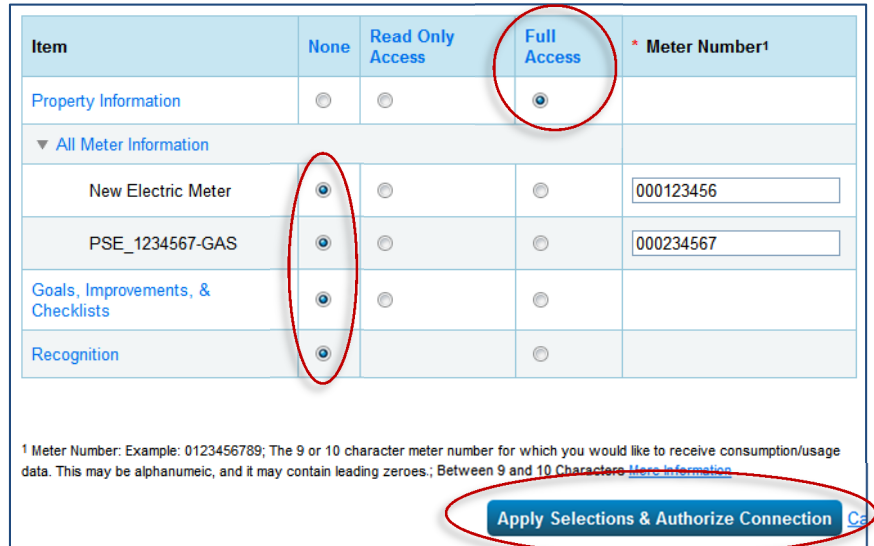
- Property Information: **Full Access**
- All Meter Information: Leave as **None** Choose None for access, even if old PSE meters are listed. Leave any meters numbers as is.
- Goals, Improvements: Leave as **None**
- Recognition: Leave as **None**

- Scroll down. For Share Forward, select "No".

- Click **Apply Selections & Authorize Connection** at the bottom of the window.

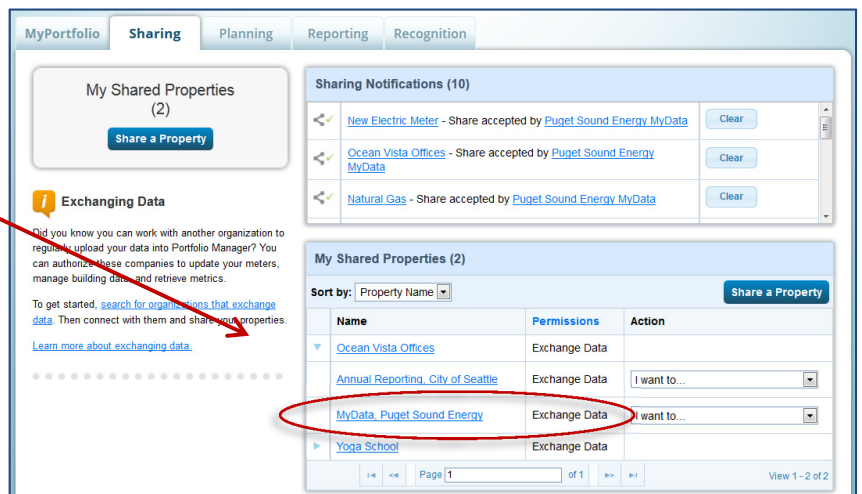
- If you selected multiple properties to share in Step B, select **Exchange Data** button again for each property, select the access permissions, and authorize connection for each property.

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



Your sharing request should be accepted by PSE in approximately 1 hour. When completed, the **MyData, Puget Sound Energy Permissions** will be listed as having **Exchange Data** permissions in Portfolio Manager.

Do not start Step D until MyData, Puget Sound Energy is listed as having Exchange Data permissions in Portfolio Manager.



D. Create a New Account in PSE's MyData

This step shows how to set up a PSE MyData account. When complete, PSE will upload approximately 3-5 years of aggregated building gas use (depending on billing history) to your Portfolio Manager account. Thereafter, your account will receive monthly uploads of aggregated gas usage data from PSE.

1. Go to PSE's website mydata.pse.com
2. Click the **Register** button.
3. Answer **Yes** to the following two questions asked:
 - Will you be reporting any usage data to EnergyStar's Portfolio Manager?
 - Do you have an EnergyStar Portfolio Manager account?

4. **Sign in** with your existing **Portfolio Manager Username** and **Password** to link to Portfolio Manager's ENERGY STAR account.
 - If you connected and shared properties via Steps A-C and waited for PSE to accept the shares, your account contact information should automatically populate on the Registration page. PSE will email you using this information, so please make any corrections.
 - If it does not populate, stop and contact PSE's User Support at 425-456-2494 or email mydata@pse.com.**
5. After you complete the MyData registration, **check your email** for a message from MyData to activate your account. **Click the link** in the email to go back to MyData.
6. Now in **MyData**, click the **Next** button.
 - The **properties shared from Portfolio Manager** should all be listed on the **Building Information** page.
 - Do not click "Add a New Building."** If your properties are not listed, stop and contact **PSE's User Support at 425-456-2494 or email mydata@pse.com.** Do not click "Add a New Building."

7. On the **Building Information** page, click **Show Details** (in the orange bar) to see the details of each building.
 - Select **Meter numbers** and enter any meter numbers that are not listed.
 - Alternatively, you may select **Address(es)** and enter the addresses or range of addresses for the building.
 - If you need to go get information, you can click **Save** and come back later to finish.

8. When done entering the information, click **Submit**.
 - MyData** should email you in up to 3-4 days to invite you back to review the building information and select report preferences.

9. After you are emailed that the building is ready, go back to **MyData** and click on **Show Details** (in the orange bar) to see the details of each building.

- In the blue box, select **Whole Building, Monthly** and **Post to EnergyStar**. (These will likely be the default selections).
- Confirm addresses and meter numbers.
If anything is incorrect or missing, contact PSE.
- If asked for, download & complete any required **release forms** and upload them.
PSE requires release forms for buildings with fewer than 5 tenants. For questions about this requirement, please contact PSE.

10. When complete, click **Submit**. *PSE will prepare your usage report and email you when it is complete. Please allow up to three days.*

- If you do not get an email, contact PSE’s User Support at 425-456-2494 or email mydata@pse.com.**

IMPORTANT: When the email arrives that your Usage Report is ready, continue with **Step F: Configure New PSE Meter in Portfolio Manager** below.

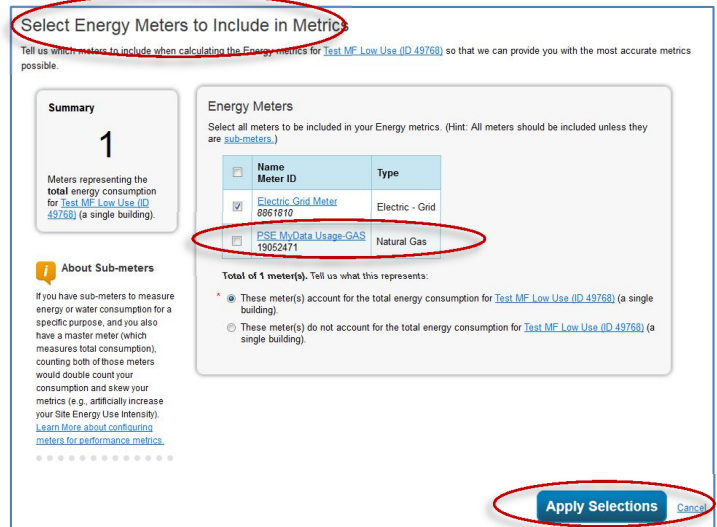
E. Configure New PSE MyData Meter in Portfolio Manager

When the Usage Report is ready, your Portfolio Manager account should have a new gas meter called **MyData Usage – GAS**. This step shows how to configure the PSE meter in Portfolio Manager to obtain the information required for compliance with City of Seattle annual reporting. If there is not a MyData meter listed, or you have any other questions, please contact the **City of Seattle Help Desk at EnergyBenchmarking@Seattle.gov** or (206) 727-8484.

1. Log into **Portfolio Manager** at <http://www.energystar.gov/benchmark>.
2. Click the property that you enrolled in **PSE’s MyData**.
3. On the **Energy** tab, under “Meters-Used to Compute Metrics,” click “Change Meter Selections.”

4. On the **Select Energy Meters to Include in Metrics** page:

- Add a check mark** to include the new **PSE MyData Usage-GAS** meter in the energy metrics.
- A check mark should also be next to the Seattle City Light electric and other active energy meters currently serving the building.
- IMPORTANT: Un-check any old PSE meters** or inactive placeholder meters. *These meters should not be included in your energy metrics because they likely contain some usage that overlaps with the new PSE MyData-GAS meter. You may choose to keep these old meters, or delete them. Just don't include them in the energy metrics, or Portfolio Manager will not generate the information required for City of Seattle Annual Reporting.*

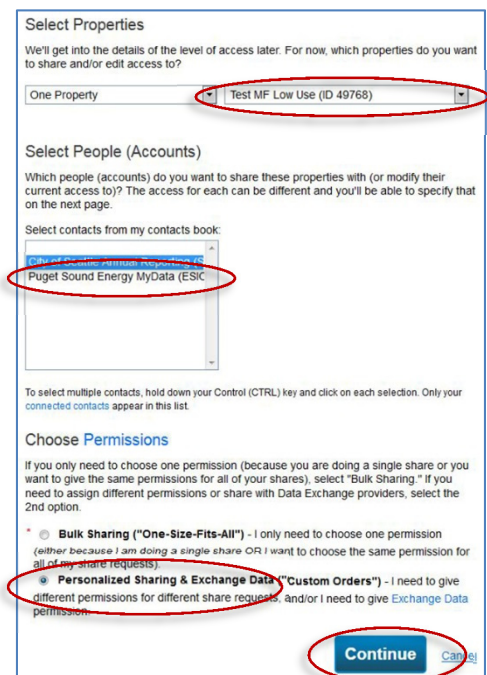


- 5. Select **“These meter(s) account for the total energy consumption for [property name].”** *This setting applies to most Seattle buildings. Advanced Portfolio Manager users may need to select different options for their buildings.*
- 6. Scroll page down and click **Apply Selections**. Please complete this step for **all buildings** in your portfolio that have a PSE MyData Usage meter.

F. Update City of Seattle Property Share

As a final step, the property and all meters must be shared as “read only” with City of Seattle Annual Reporting.

- 1. Go to the **Sharing Tab** and click on **Share (or Edit Access to) a Property**.
- 2. Select the property(ies).
- 3. Select contact, **Annual Reporting, City of Seattle**.
- 4. For **Choose Permissions** select, “Personalized Sharing & Exchange Data.” **Continue**.
- 5. On the next screen, select the button for **Exchange Data**, which will pop-up the Access Permissions window.



Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
<ul style="list-style-type: none"> ▼ Ocean Vista Offices (3046669) <ul style="list-style-type: none"> Annual Reporting, City of Seattle 	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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

7. **IMPORTANT:** Select the **Access Permissions** as follows:
- Property Information: **Read Only**
 - All Meter Information: **Read Only**
 - Goals, Improvements: **Read Only**
 - Recognition: Leave as **None**
8. Scroll down. For Share Forward, select “No”.
9. Click **Apply Selections & Authorize Connection** at the bottom of the window.
- If you selected multiple properties to share above, select **Exchange Data** button again for each property, set the access permissions to read only, and authorize connection for each property.

City of Seattle Energy Benchmarking Building ID: Example: 1147

Building identifier provided by the City of Seattle Energy Benchmarking program (NOT your Portfolio Manager Building ID). If you do not know your City of Seattle Building ID, contact (206) 727-8484 or click on "More Information" below.; Between 1 and 5 Characters [More Information](#)

Please select the permission level you would like to grant [Annual Reporting, City of Seattle](#) for [Ocean Vista Offices](#) for each category. If "None" is selected for all items, [Annual Reporting, City of Seattle](#) will not receive any access to this property.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
▼ All Meter Information			
New Electric Meter	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
PSE MyData Usage-GAS	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Recognition	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Sort by:

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Ocean Vista Offices (3046669)					
MyData_Puget Sound Energy	<input type="radio"/>				<input checked="" type="radio"/> Edit

Share Property(ies) [Cancel](#)

11. Portfolio Manager should display the message, “You have successfully shared/edited access to your property(ies)...”

MyPortfolio **Sharing** Planning Reporting Recognition

You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

If you edited web services Custom ID fields, [read this](#).

12. **Confirm compliance** with City of Seattle Annual Reporting by emailing or calling with the following to energybenchmarking@seattle.gov or (206) 727-8484:
- City of Seattle Building ID and Building Name/Address.
 - Phone number and best time to reach you.
 - 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.*