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 <u>www.energystar.gov/benchmark</u>.
- 2. Check if **Puget Sound Energy MyData** is already a contact, by clicking on **Contacts** in the upper right corner of the **MyPorfolio** page.
- On the My Contacts page, check if MyData, Puget Sound
 Energy is listed as Connected.
- 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).
- 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.



One Property		Test MF Low Use (ID 49768)	
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Puget Sound Energy My	Data (ESIC		
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Choose Permissio	ns		
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 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.

Select Permissions for Each Co The access levels you select do not have to Sort by: Property Name	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: Property Name									
Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data					
▼ Ocean Vista Offices (3046669)										
MyData, Puget Sound Energy	O				•					
					\smile					
			Sh	are Property(ies) <u>Cancel</u>					

C. Set PSE MyData Access Permissions

1. 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**
- 2. Scroll down. For Share Forward, select "No".
- 3. 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 permisions in Portfolio Manager.

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

ltem	None	Read Only Access	Full Access	* Meter	r Number¹			
Property Information	\odot	0	۲					
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PSE_1234567-GAS	۲	0	O	000234	567			
Goals, Improvements, & Checklists	۲	0	O					
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¹ Meter Number: Example: 0123456789; The 9 or 10 character meter number for which you would like to receive consumption/usage data. This may be alphanumeic, and it may contain leading zeroes.; Between 9 and <u>10 Charactere Mere Information</u> Apply Selections & Authorize Connection								
Select Permission The access levels you s Sort by: Property Name	ns for Each Co elect do not have to	ontact o be the same for eacl	n property or each pe	rson.				
Name (ID)		None	Read Only Access	Full Access	Custom Access	Exchange Da		

<u>Ocean Vista Offices</u> (3046669)
 <u>MyData, Puget Sound Energy</u>



Edit

Share Property(ies)

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?

Sign In	New User?
Username:	MyData is a fee web-based tool offered by PSE that allows hullding owners, managers and operators to track and assess energy consumption of their buildings. By registering your property, you will be a part of what is becoming an industry standard and will receive quick and accurate data on a month basis for your entire building. This tool will enable you to comply with stater regulations and the state of the state
i daamotu.	including required reporting in the <u>City of Seattle</u> via Energy Star Portfolio Manager.
	IMPORTANT - Users who wish to report their energy usage data through Energy Star Portfolio Manager must have a Portfolio Manager account set up before registering in MyData.
Submit	If you have not set up your PM account yet, go to the Energy Star website to register and
Forgot your password? Forgot your username?	follow instructions in the City of Seattle's How To Guide. To find the guide, go to the City's How to Compty page, and locate the How To Guide link under the heading First Time Reporting?.
	 If you have an existing PM account, on the same <u>box to Camply page</u>, locate Enroll in PSE MyData under the heading Updating a Building that Reported Last Year? and follow the instructions there. This tells you how to reautherize and reconnect with PSE before registering in MyData.
	To help you obtain your building's energy usage data from PSE, please follow the instructions provided in the <u>MyData User Stock</u>

- 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 <u>mydata@pse.com</u>.
- 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 <u>mydata@pse.com</u>. Do not click "Add a New Building."
- 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.

MyData	
Building Information	○ O Step 2 of 3 - Building Information
Add new building Tog fundaming Dia Contre Please setical silver methodes or addresses:	On the page year will people detailed building information. You can see your building building building the page of the page
Small Building Delve	you will receive an ensite your outring information, it will be validated and then you will receive an ensite within 3 to 5 business days. Then you will login to MyOata and navigate to Step 3 of 3. There you will review your building summary and select your repetring preferences.
Francial Office Please select either motor numbers or addresses: *	Building Status Big Dalding in Progess Small Dulding in Progess
Back Continue	

- 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.

- 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.*

his building has been created and is ready for you	r review. Please choose your report preferences and complete your request.
	Status: Release Forms Required
Please choose how you prefer to receive O Individual Meters	e data: *
Reporting Options: * ● Monthly ○ One Time Only → ost to EnergyStar	
Confirm the addresses and meter number of the second	Imbers below accurately represent your building. Ing Submit to complete your request.
Confirm the addresses and meter nu commay fill in the Tenant/Unit Name before clicki Tenant/Unit Name:	Imbers below accurately represent your building. Ing Submit to complete your request. Wo require a release form for this tenant.
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□ 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 <u>active</u> 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.

Summary	Energy	Meters				
1	Select all are sub-m	meters to be included in you leters.)	r Energy metrics. (Hin	t: All meters shou	d be included unless the	ey 🛛
leters representing the		Name Meter ID	Туре			
otal energy consumption or <u>Test MF Low Use (ID</u> 9768) (a single building).	V	Electric Grid Meter 8861810	Electric - Grid			
	\bigcirc	PSE MyData Usage-GAS 19052471	Natural Gas	>		
About Sub-meters	Total	of 1 meter(s). Tell us what th	is represents:			
u have sub-meters to measure	* Tr bi	ese meter(s) account for the	total energy consump	tion for <u>Test MF L</u>	<u>ow Use (ID 49768)</u> (a sin	gle
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sumption and skew your rics (e.g., artificially increase Site Energy Lise Intensity)						
In More should configuring						

Select Properties

- 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.

- 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 popup the Access Permissions window.



Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Ocean Vista Offices (3046669)					
Annual Reporting, City of Seattle	O				0

 On the Access Permissions page, <u>do not change</u> 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 tfield is empty, send building name and address to <u>EnergyBenchmarking@Seattle.gov</u> 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**
 - $\hfill\square$ 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.
- This will open the Sharing window again. Click on the Share Property(ies) button to complete the editing/sharing process.

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 <u>More Information</u> Please select the permission level you would like to grant <u>Annual Reporting. City of Seattle</u> for <u>Ocean Vista</u> <u>Offices</u> for each category. If "None" is selected for all items, <u>Annual Reporting. City of Seattle</u> will not receive an access to this property.	06) <u>ion</u> any
Item None Read Only Access Full Access	
Property Information	
▼ All Meter Information	
New Electric Meter	
PSE MyData Usage-GAS 💿 💿	
Goals, Improvements, & Checklists	
Recognition	

Select Permissions for Each C The access levels you select do not have to Sort by: Property Name •	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: Property Name									
Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data					
▼ Ocean Vista Offices (3046669)										
MyData, Puget Sound Energy	O				Edit					
		·	Sha	are Property(i	ies) <u>Cancel</u>					

11. Portfolio Manager should display the message, "You have successfully shared/edited access to your propery(ties)..."

MyPortfolio	Sharing	Planning	Reporting	Recognition	
You have suc share. If you e If you edited w	cessfully shared/eo edited access to co veb services Custo	dited access to yo urrent permissions om ID fields, <u>read t</u>	ur property(ies). If , the edits have be <u>his</u> .	you shared properties, you will receive a notification when your contact has accepted th en made, no acceptance is required.	e

- 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.
 - $\hfill\square$ 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.