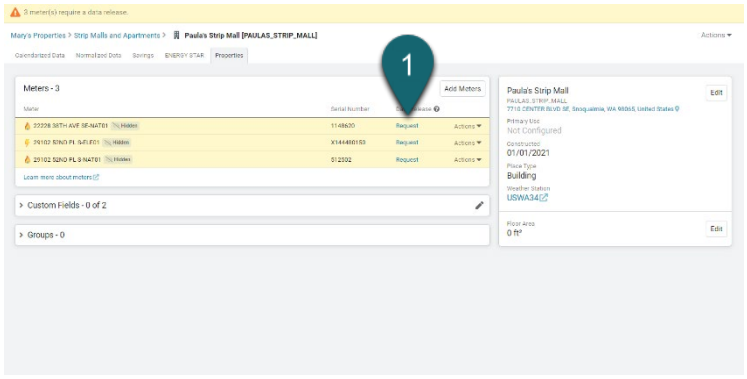
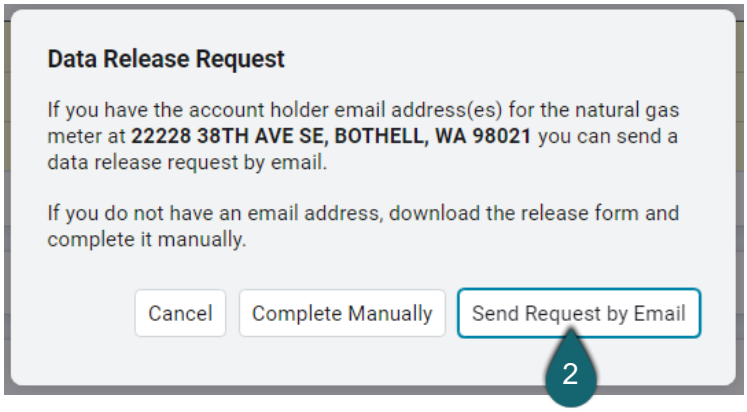
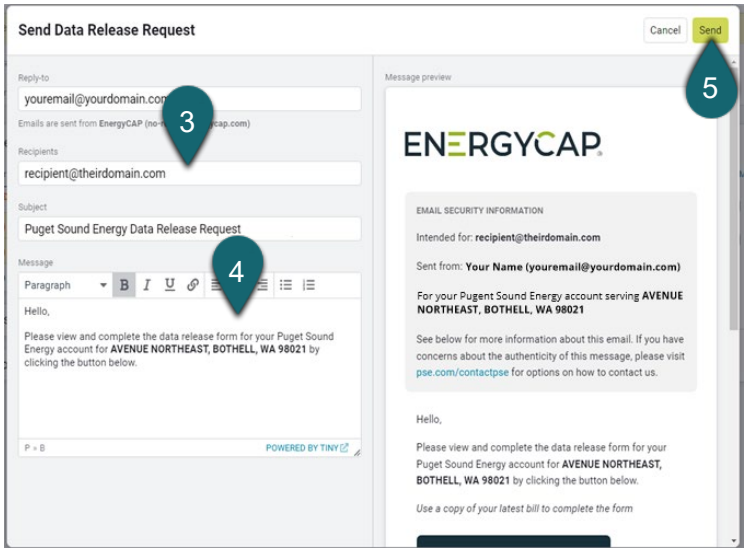
Complete a Data Release

Purpose	By the end of this job aid, you will be able to complete a data release in EnergyCAP via email or manually.
Audience	EnergyCAP customers and PSE users.

		Complete a Data Release via Email
	**1**	Click the **Request** button under the Data Release column for the meter of your choice.
	**2**	Click the **Send Request by Email** button.

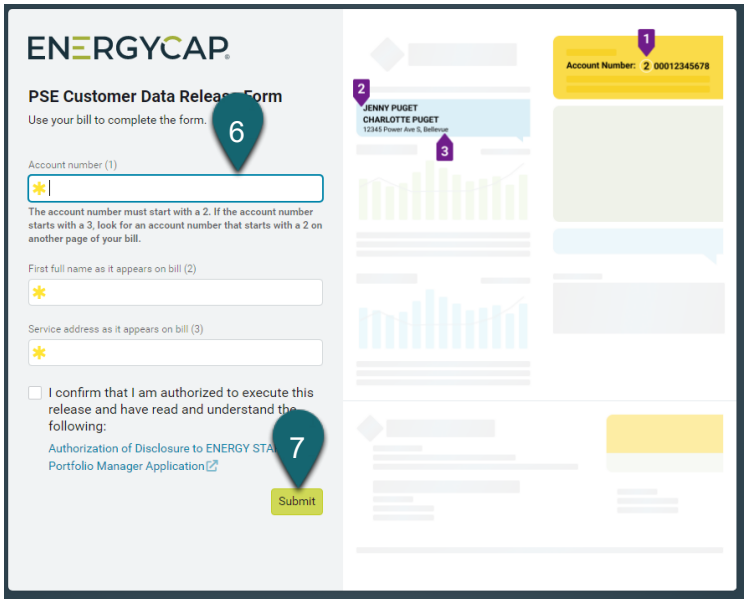
EnergyCAP: Add an Aggregate Meter and Complete a Data Release, continued



3 Input the Recipient's email address.

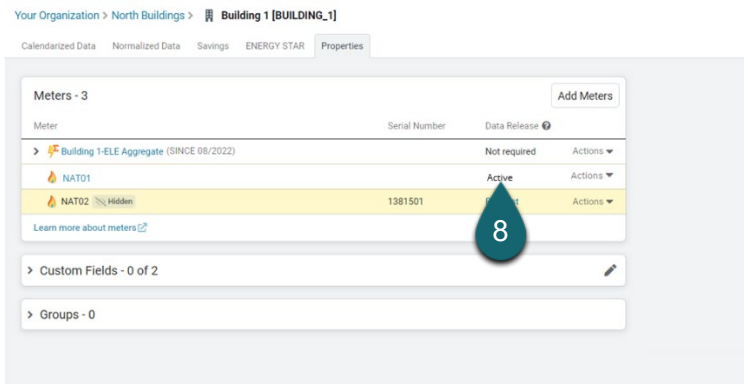
4 Add any personalization to the message that you would like.

5 Click **Send**.



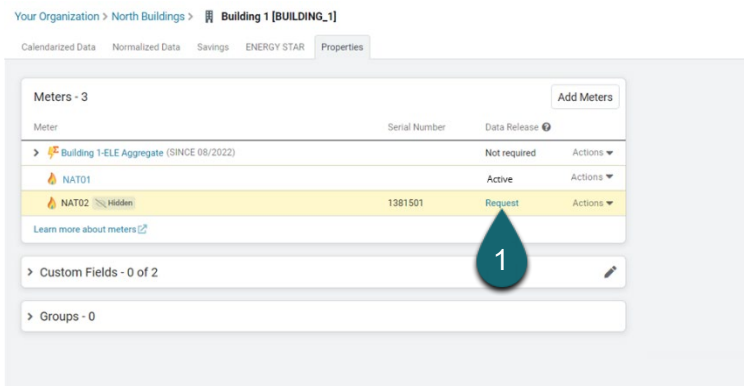
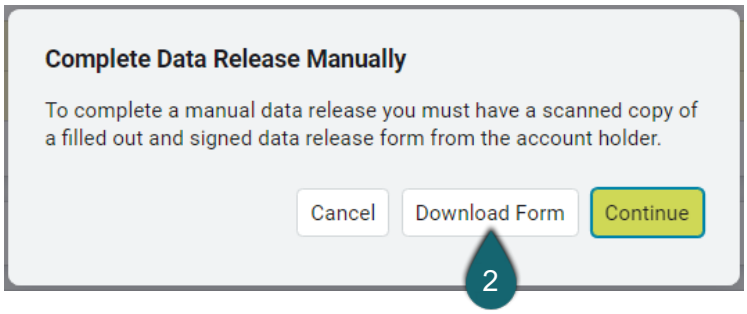
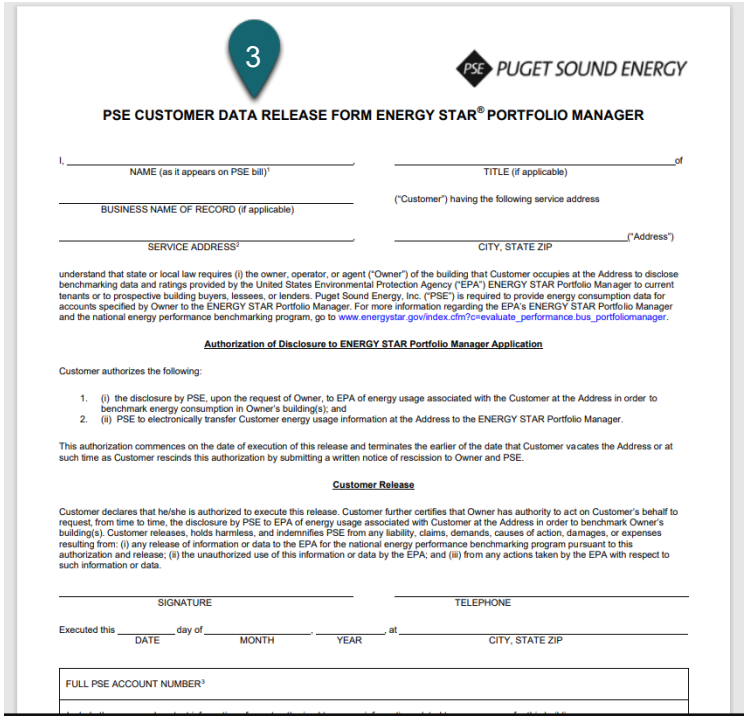
6 When the customer clicks to complete the release form, the PSE Customer Data Release Form will appear. The customer will then need to input the account number, their name, and service address exactly as it appears on their bill, as well as confirm authorization to execute the release and understand the terms in the Authorization of Disclosure to ENERGY STAR Portfolio Manager Application.

7 Click **Submit**.

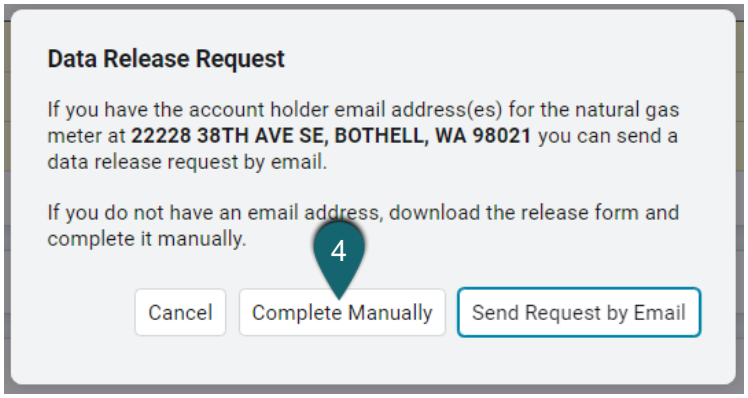


8 Result: The status of the Data Release for that meter should now be Active.

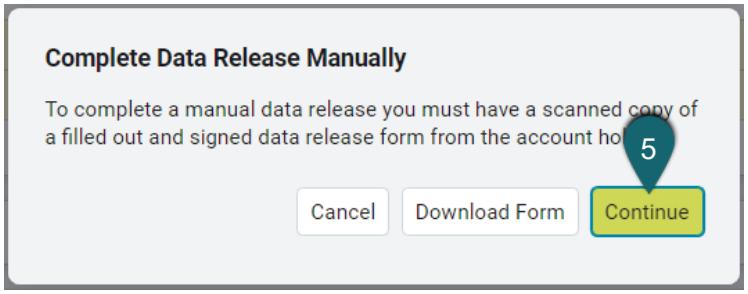
EnergyCAP: Complete a Data Release, continued

		Complete a Data Release Manually
	**1**	Click the **Request** button under the Data Release column for the meter of your choice.
	**2**	Click the **Download Form** button.
	**3**	The building owner will send a copy of the form to the tenant who will complete the form and return it to the building owner. Note: When requesting the tenant to fill out this form, you may want to request a copy of the tenant's bill to ensure the process can be completed without any issues.

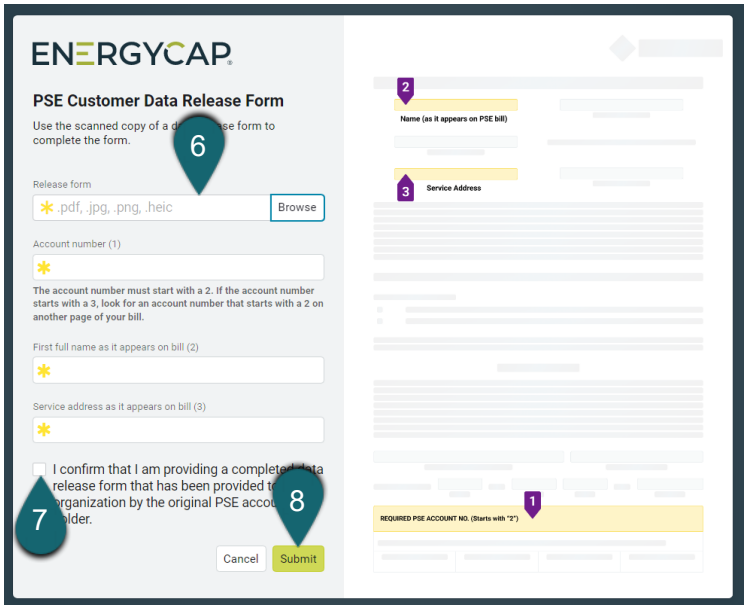
EnergyCAP: Add an Aggregate Meter and Complete a Data Release, continued



4 Click the **Complete Manually** button.



5 Click the **Continue** button.

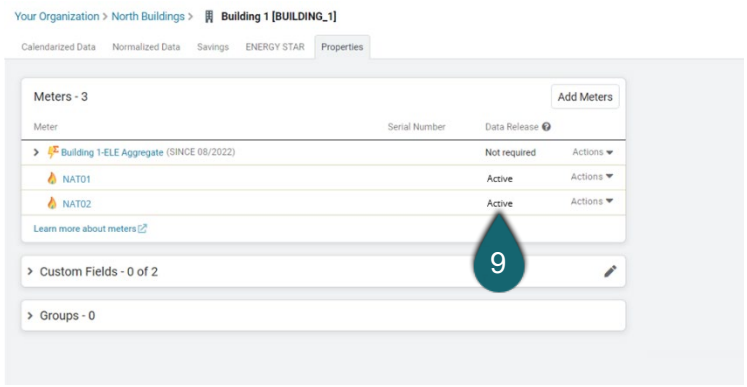


6 The building owner will then attach the release form, input the account number, full name and service address exactly as it appears on the bill.

7 Check the confirmation checkbox.

8 Click Submit.

EnergyCAP: Add an Aggregate Meter and Complete a Data Release, continued

	**9**	Result: The status of the Data Release for that meter should now be Active.