

ANNUAL UPDATE CHECKLIST

GET SUPPORT

- ☐ Help Desk energybenchmarking@seattle.gov OR 206-727-8484
- ☐ How to Guide
 See Instructions page at
 seattle.gov/energybenchmarking

COMPLIANCE DEADLINE

JULY 1st, 2022 for 2021 data

PSE stops MyData updates if your building has 4 or less tenants and a tenant(s) changes. You must upload a signed release from the new tenant to your MyData account.

Actual property use details, such as operating hours for office and number of units & bedrooms for multifamily, are required for compliance.

Click on Instructions at seattle.gov/energybenchmarking and see the Data Accuracy and Verification section for more information.

Annual Update Steps

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

- 1. Get Started
- ☐ Log into www.energystar.gov/benchmark.

For password help, go to: https://portfoliomanager.energystar.gov/pm/account/help/password

- 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 the end of December for the reporting year with no gaps or overlapping dates. Check automated update status (if enrolled):
 - ELECTRIC: If data is not updated through at least December 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 December, email mydata@pse.com or call at 425-424-6486. If not enrolled, go to to www.seattle. gov/energybenchmarking, click on How to Comply, Enroll in PSE MyData.
 - STEAM: If missing data, call CenTrio (Seattle Steam/Enwave) at 847-420-6432.
 - On the Energy tab, check that the number of "Meters-Used to Compute Metrics" equals the number 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."

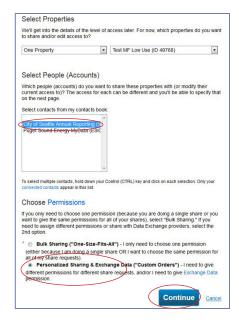
3. Update Property Details

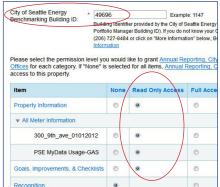
- On the Details tab, select the triangle next to each property use to show the square footage and other property details.
- Default or temporary values must be corrected with actual values. Select the Action menu and choose, "I want to... Correct Mistakes." In the History Log, enter the actual value 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 Information
 - ☐ In the upper right corner of Portfolio Manager, click Account Settings. If contact information has changed, update the name, email, and phone number. Click Make Changes.



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- 5. Check for EUI and ENERGY STAR Score
 - On the Summary tab, look for the building's Site EUI and make sure populates for December of the reporting year.
 - ☐ The ENERGY STAR score should also be listed (if available).
- 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).

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Test MF Low Use (ID 49768) (4126522)				(
City of Seattle Annual Reporting	0				● Edit

- ☐ 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:
 - o Property Information: Read Only
 - o All Meter Information: Read Only
 - o Goals, Improvements & Checklists: Read Only
 - o 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 and Accuracy
 - Go to <u>seattle.gov/energybenchmarking</u> and click Check Compliance for 2021 Reports to check your compliance 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 possible errors will be flagged for accuracy and required to make corrections.

