HOW TO GUIDE

Step-by-step instructions to use the U.S. EPA’s Portfolio Manager to comply with the City of Seattle’s Energy Benchmarking and Reporting requirements.

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www.seattle.gov/EnergyBenchmarking
What is Energy Benchmarking?

Benchmarking tracks the total electricity, natural gas, steam, or other utilities used in a building (often called energy or building performance). The U.S. EPA’s ENERGY STAR Portfolio Manager is the standard for benchmarking. This How to Guide shows how to benchmark a building to determine the building’s:

- **Energy Use Intensity** (EUI), which indicates the building’s energy use per square foot (kBtu/sq. ft.) per year. A lower score indicates a more efficient building.
- About 20 types of buildings will also receive a 1-100 **ENERGY STAR** rating. A higher score indicates a more efficient building.

See How Your Building’s Energy Use Stacks Up!

When you are finished benchmarking, compare your building’s energy use intensity (Site EUI), which is its annual energy use per square foot with other similar types of buildings in Seattle at [www.seattle.gov/EnergyBenchmarking](http://www.seattle.gov/EnergyBenchmarking). The information is based on data analyzed from buildings 20,000 SF or greater that had 2012 energy use reported to the City, as required by the Seattle Energy Benchmarking and Reporting law.

- The **Site EUI** is located on the building’s **Statement of Energy Performance**. See Step 4 to create one.
**STEP 1  Get Started**

- Confirm the accuracy of the information provided about the building on the notification and/or warning letter sent by the City of Seattle. This includes:
  1. building size
  2. building address
  3. year built
  4. building owner or property manager
To correct errors, please contact the Benchmarking Helpdesk at energybenchmarking@seattle.gov or (206) 727-8484.

- Obtain the following details about the building’s use:
  1. The primary use of the building. For example: multifamily, office, warehouse, etc.
  2. The gross floor area of the building, not including parking area.
  3. The floor area of parking that is metered with other building uses. For example: a garage with lights and ventilation energy use that is connected to the “house” meter, which may also serve common areas in the building.
  4. The floor area of any other uses of the building. For example: a multifamily building might have ground floor retail shop(s).
  5. For buildings eligible for an ENERGY STAR score, other details like operating hours, number of workers, etc. are required for benchmarking. Use the Property Use Details Worksheet for ENERGY STAR Eligible Buildings in the Appendix of this guide.

**Need help?**

For free help, e-mail energybenchmarking@seattle.gov or phone (206) 727-8484 (M–F, 8–5).
Visit the website to learn about in-person help and free workshops.

**Already benchmarking?** If you currently benchmark your building using Portfolio Manager, simply skip to Step 4 to confirm building’s Energy Use Intensity and then complete steps 5 and 6.

**Missing your letter?**

Contact the Help Desk for a copy or to find your building’s ID number.

**Prefer to use an outside service provider?**

Visit www.neec.net/benchmark for a list of benchmarking vendors.

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HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484
8:00–5:00 Monday–Friday
STEP 2  Set Up the Property in EPA Portfolio Manager

- Create a new account in Portfolio Manager at www.energystar.gov/benchmark.
  1. On the right side of the page, click the green Sign Up button.
  2. DO NOT use ANY special characters in your username (letters and numbers only).
  3. KEEP A RECORD of the username and password — it is not possible to change usernames and very difficult to recover a lost password!
  4. We recommend using one Portfolio Manager account per building, so buildings can be easily transferred to a new employee, manager or owner.

- Answer the basic questions about you and your organization.
  1. For Reporting Units, choose “Conventional EPA Units (e.g., kBtu/ft²).”
  2. For “Will you be using the web services API to develop software to exchange data with Portfolio Manager?”, choose No.

- After creating an account, log in. You will be prompted to set up a property.
  Or you can choose Add a Property.
  1. Select the primary function of the property.
  2. Select the number of buildings. Most people will select, “One: My property is a single building.” If the property is a campus (see right), please read the Campus Benchmarking Instructions in the appendix.
  3. For Your Property’s Construction Status, select Existing.
  4. Click Get Started!

A campus is a set of buildings on a shared energy meter or central heating plant (not including hospitals, senior care, or K-12 schools).

What if I don’t use a computer?
1. Call (206) 727-8484 and provide a mailing address.
2. Complete and return mailed forms and our staff will facilitate your computer process.

How does Portfolio Manager define a Property? Portfolio Manager calls buildings “properties” and in most cases one building = one property. In Portfolio Manager, “properties” mean a contiguous parcel, not all the properties that a person may own throughout a city.
Enter Basic Property Information including the building name, address, year built, occupancy and gross floor area (not including parking).

1. If parking IS served by an energy meter connected to the building it serves, SELECT “My property’s energy consumption includes parking areas”.

2. If parking IS NOT served by an energy meter connected to the building it serves (i.e. it is on a separate meter), DO NOT select “My property’s energy consumption includes parking areas”.

3. If unsure, you may click continue and add parking as a space type later.

Click Continue.

On the next page, enter details about the primary building use, and additional property uses, based on the boxes checked on the prior page.

The specific use details required will differ based on the property type selected. Refer to the Property Use Details Worksheet for ENERGY STAR Eligible Buildings in the Appendix of this guide.

1. Hover the computer mouse over each property use characteristic for definitions.

2. If you don’t have all the information, use Default/Temporary values. Please update this with real information later or your score will not be accurate.

3. The Gross Floor Area (GFA) that you entered when setting up your property will automatically populate into the GFA section.

**NOTE** If your property has multiple uses, you may want to adjust this number based on the actual GFA for the primary type of use. (Example: The building’s primary function is office and the total GFA of the whole building is 30,000 sf. It also has some retail stores totaling 10,000 sf.) When entering the attributes for the primary space type (office), change GFA to reflect JUST the office space: 20,000 sf. Next click “Add Another Type of Use” to enter the attributes and remaining square footage for the building’s retail space.

Additional Uses?

Add more space uses to your property by selecting an option in the drop down menu Add Another Type of Use, and then click “Add”. This will open up a different list of attributes for that particular space type.

Continue to Step 3 →
STEP 3  Obtain Energy Meter Usage Data

Data Exchange

Seattle City Light (SCL), Puget Sound Energy (PSE), and Seattle Steam can upload whole building data to your Portfolio Manager account every month via Portfolio Manager data exchange (web services). NOTE: This service was formerly called Automated Benchmarking or ABS.

Utility Contact Information

Seattle City Light - See page 7 for NEW instructions.
  Email  scl_portfolio_manager@seattle.gov
  Phone  (206) 684-7557
  Website  www.seattle.gov/light/accounts/energyusage

Puget Sound Energy - See page 11 for NEW instructions.
  Email  mydata@pse.com
  Phone  (425) 456-2494
  Website  http://mydata.pse.com

Seattle Steam - See page 17 for NEW instructions.
  Phone  (206) 623-6366 or (206) 658-2025
  Website  www.seattlesteam.com/energy-star-reporting.htm

Manual Meter Entry

If only few energy meters serve your building, or you want to track energy use closely by tenant or meter AND have access to all the bills, another option is to enter the monthly energy use by month into your Portfolio Manager account. Manual meter entry can be used for some or all of your utility services. For example, data exchange could be used for City Light electric, but Seattle Steam could be manually entered.

Manual Meter Entry instructions are in the appendix.
3A SEATTLE CITY LIGHT DATA EXCHANGE

1. Fill Out & Submit Consumption Request Form
   - Visit www.seattle.gov/light/accounts/energyusage to complete and send the Portfolio Manager Automated Benchmarking Consumption Request form and agree to the Terms and Conditions.
   - Your Request form will be processed within four business days. Look in your email for the Automated Benchmarking Authorization form from SCL.

2. Authorization and Connecting to SCL

   IMPORTANT: These screenshots supplement the instructions provided on SCL's Automated Benchmarking Authorization form, which you must have to proceed.

   - Log in to Portfolio Manager with the Authorized Portfolio Manager Username listed on your Seattle City Light Authorization form.
   - If you have not previously added SCL as a contact, you will need to add them:
     1. Click the contacts link in the upper right hand corner, then, leaving the search box empty, click the Search button.
     2. Under Your Search Criteria, enter SCL as Name. Enter or click Search.
     3. From the list of contacts, locate SCL Portfolio Manager.
     4. Click the Connect button to the right of the name.
     5. When prompted, enter your Portfolio Manager Username in all uppercase letters, check the Terms of Use and then Send Connection Request button.
     6. This connection request should be accepted in approximately 1 hour. Please wait before proceeding.

HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484
8:00–5:00 Monday–Friday
3. Connection Approval and Virtual Meter Setup

- In Portfolio Manager, on the MyPortfolio tab, under the My Properties section, click on the name of the building that has the meter you are setting up.

- Still on MyPortfolio tab, click the Meters tab, then click Add Another Meter.

- In the Get Started Setting Up Meters section, answer the questions:
  1. Under Sources of Your Property’s Energy check Electric and purchased from the grid.
  3. Scroll down below the Water Usage section and click Get Started!

- On the next page, in the Meter Name column, click on the words: Electric Grid Meter.
  1. Replace the words: Electric Grid Meter with the Virtual Meter Name that SCL provided on the authorization form.
  2. Under Units, select kWh (thousand kilowatt hours).
  3. Under Date Meter Became Active, type in: 01/01/2009. (Leave “Inactive” date blank and “Enter as Delivery” un-checked.)
  4. Click Continue.

Tip: Copy the Virtual Meter name directly from the SCL authorization form and paste it to reduce typos.
□ On the next page, click the **Finish Meter Set Up** button.

□ In the **Property Totals** section, under **Energy Meters**:
   1. Check all of the meters.
   2. Select: **These meter(s) account for the total energy consumption for this property**.
   3. At the bottom of the screen, click the **Apply Selections** button.

![Property Totals](image)

### 4. Share Property with Seattle City Light

□ Go to the **Sharing Tab** and click **Share (or Edit Access to) a Property**.
   1. Select **One Property** and then choose the building to connect to SCL.
   2. Select contact, **Portfolio_Manager, SCL**.
   3. Under **Choose Permissions**, select the second option: “I need to give different permissions for different share requests, and/or I need to give Exchange Data permissions.” Click **Continue**.

![Select Properties to Share](image)
On the next screen, select the **Exchange Data** button, which will pop-up the Access Permissions window.

1. In the pop-up window, enter the **Service Order number** found at the top of your SCL Authorization Form. You need to enter the Service Order number in **TWO** places as shown below.

2. **IMPORTANT:** Set the Access Permissions exactly as follows:
   - Property Information: **Read Only Access**
   - SCL Virtual Meter Name: **Full Access**
   - For any other meters listed: **None**
   - Goals, Improvements: **None**
   - Recognition: **None**

   **TIP:** You must provide “full access” to the SCL Virtual Meter, so that SCL can upload your energy data to your account. Make sure that is the only meter for which you have granted SCL “full access.”

3. Scroll down. For **Share Forward**, select “No”.

4. Scroll down the window and click **Apply Selections & Authorize Connection**.

   - This will open the Sharing window again. Click on the **Share Property(ies)** button to finish.
   - You should see data in your Virtual Meter in about four hours. **Thereafter, SCL will update this meter monthly.**
PSE CUSTOMERS: These instructions will show you how to enroll in PSE MyData to obtain your buildings natural gas usage history. MyData will also provide automated monthly uploads of gas usage thereafter once enrolled.

1. Add PSE as a Contact

☐ If you have not previously added PSE as a contact, you will need to add them:
   1. Click the Contacts link in the upper right hand corner.
   2. Click on Add Contact.

☐ Enter ESIOPERATOR as the Username. Click Search.

☐ From the list choose Puget Sound Energy MyData. Click the Connect button.

☐ Review Terms of Use, ‘check the box’ and click Send Connection Request.

☐ This connection request should be accepted in less than 1 hour.

2. Share Your Building with PSE

☐ Go to the Sharing Tab and click on Share (or Edit Access to a Property).

☐ Select the properties to share with Puget Sound Energy MyData.

☐ Under Choose Permissions, select the second option:
   “I need to give different permissions for different share requests, and/or I need to give Exchange Data permissions.” Click Continue.

☐ On the next screen, select the Exchange Data button, which will pop-up the Access Permissions window.

HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484 8:00-5:00 Monday-Friday
IMPORTANT: Select the Access Permissions as follows:

1. Property Information: Full Access (PSE requires Full Access so that they can create a new meter in your account.)
2. All Meter Information: Leave as None. (Choose None for access, even if old PSE meters are listed. Leave any meters numbers as is.)
3. Goals, Improvements: Leave as None
4. Recognition: Leave as None

CAUTION! Any non-PSE meters, such as City Light electric must be listed as None for access.

Scroll down. For Share Forward, select “No”.

Click Apply Selections & Authorize Connection.

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

IMPORTANT: Your sharing request should be accepted by PSE in approximately 1 hour. Do not start the next step until MyData, Puget Sound Energy is listed as having Exchange Data permissions in Portfolio Manager, as shown below.
3. Create a New Account in PSE’s MyData

☐ Go to mydata.pse.com

☐ Read the new user information and click the Register button.

☐ Answer Yes to both questions:
   1. Will you be reporting any usage data to EnergyStar’s Portfolio Manager?
   2. Do you have an EnergyStar Portfolio Manager account?

☐ Sign in with your existing Portfolio Manager Username and Password.
   1. If you connected to PSE and shared properties 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 make corrections.
   2. If it does not populate, stop and contact PSE at 425-456-2494 or email mydata@pse.com.

☐ After completing 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.

☐ Now in MyData, click the Next button.
   1. The properties shared from Portfolio Manager should all be listed on the Building Information page.
   2. If your properties are not listed, stop and contact PSE at 425-456-2494 or email mydata@pse.com. 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.
   1. Select Meter numbers and enter any meter numbers that are not listed.
   2. Alternatively, you may select Address(es) and enter the addresses or range of addresses for the building.
   3. If you need to go get information, you can click Save and come back later to finish.
When done entering the information, click **Submit**.

1. **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.

1. In the blue box, select **Whole Building, Monthly** and **Post to EnergyStar**. (These will likely be the default selections).
2. 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.**

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.
4. Configure New PSE Meter in Portfolio Manager

After MyData is set up, PSE should add a new gas meter to your Portfolio Manager account called MyData Usage - GAS meter. This step shows how to log into your Portfolio Manager account to make sure the new PSE MyData Usage - GAS meter is listed and configure it to obtain the building’s required EUI.

- Log back into Portfolio Manager and click on the property to open.
- On the Meters tab, look for a meter named PSE MyData Usage - GAS.
- Check that the Most Recent Bill Date lists a date within the last two months.

- On that same page, open View/Edit Configuration.
  1. Under Energy Meters, add a check mark to include PSE MyData Usage-GAS in the energy metrics. IMPORTANT: A check should also be next to the electric and any other energy meters currently serving the building. If there are other previously entered PSE meters that are now included in the new PSE MyData Meter, uncheck them. You may also consider deleting these “old” PSE meters.
  2. Select “These meter(s) account for the total energy consumption of this property.”
  3. Click Apply Selections.
☐ Go back to the **Meters** tab.

☐ In the row for the **PSE MyData Usage-GAS** meter, under the Action column, choose, “I want to...Edit Basic Meter Information.”

☐ On the **Basic Meter Information** page, change the **Units** for the gas meter listed to “Therms” if not already listed as Therms.

☐ Set the **Date Meter Became Active** to the date of the first bill, or earlier.

☐ Click **Save Changes**. As long as the date the meter became active is earlier than the first bill date, bypass the pop-up message by clicking **Continue**.

☐ When finished, continue to Step 4.

![Basic Meter Information](image-url)
STEAM CUSTOMERS: The instructions below are a summary of those available for download from your Seattle Steam Account. Please follow Steam’s complete instructions and use these for general guidance only.


☐ Create your steam meters listed on a current Seattle Steam bill.

☐ Establish a connection with Seattle Steam Company in your Portfolio Manager account by adding Seattle Steam Company as a “contact”. Steam will receive your request and complete the connection.

☐ Request Data Exchange services from Seattle Steam Company in your Portfolio Manager account by “sharing” your property and granting “Exchange Data” access to Seattle Steam. Set access permissions for each steam meter to “Full Access”.

☐ Steam will complete your setup and report the most-recent 2 years of usage data for each steam meter to your Portfolio Manager account. Monthly reporting will automatically continue; data updates will be completed by the 15th of each month after the billing cycle.
STEP 4  Print a Statement of Energy Performance and Confirm Energy Use Intensity (EUI)

An EUI ending December 31 for the required year must be available to report to the City. The EUI indicates the energy use per square foot per year (kBtu/sq. ft.) and can be used to compare the building’s energy use to other similar building types. The easiest way to learn the EUI is to generate a Statement of Energy Performance.

☐ Confirm that energy meters set up in Step 3 have entries for all 12 months of the required year ending in December. (If entering bills manually, enter the last bill that includes all of December. You may need to add a January bill.) Also confirm that the property’s Gross Floor Area was entered in Step 2.

☐ Go to the Reporting tab and choose Statement of Energy Performance.


☐ Select the property name.

☐ Select Timeframe: Single Year ending Dec of the required year.

☐ Select contacts (optional).

☐ Click Generate & Download Report(s) and a PDF of the report should appear. (If your web browser has pop-up blockers, disable them if the report does not appear.)

☐ Confirm that the Statement of Energy Performance lists a Site EUI for Year Ending: December 31, [required year]. (See next page for an example.)

☐ Save and print a copy for your records.

NOTE If the building does not have 12 months of utility data ending in that December, Portfolio Manager will generate an error message like this:

If you get an error, and are sure that all the energy meters have a full year of data ending December 31st, contact the Help Desk for assistance.
How to Read the Statement of Energy Performance

The Statement of Energy Performance is a quick reference for sharing your building’s energy use as indicated by the Site EUI—required by Seattle law of building owners if requested by current and future tenants, buyers or lenders. Although not required by Seattle, the document is also used to show ENERGY STAR-certified buildings when verified by a professional engineer.

Make sure the date is December 31 for the required reporting year.

Some types of buildings are eligible for this 1-100 score that compares the building’s energy efficiency to similar buildings nationwide. A higher score indicates a more efficient building. A 75 or higher may be eligible to apply for ENERGY STAR certification.

Buildings benchmarked correctly should have a Site EUI, which shows the building’s energy use per square foot per year. A lower score indicates a more efficient building.

Continue to Step 5 →
**Add the City of Seattle as a Contact**

- Click on the **Contacts** link in the upper right-hand corner of the screen.
- Click **Add a Contact** to search for users that you can connect with.
- In the **Username** field, type in “SEATTLE.GOV” and click search.
- From the **Search Results** page, select **City of Seattle Annual Reporting** and click connect.
- Fill in your Contact Name, Contact Email Address and Contact Phone Number.
- Agree to the Terms of Use and select **Send Connection Request**.
- **IMPORTANT** The City of Seattle processes new contact requests **hourly**. You will be sent a confirmation email when the City of Seattle accepts your request.

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**Once your request is accepted, continue to Step 5 →**
STEP 6 Share Building with the City of Seattle

☐ After you are connected to City of Seattle Annual Reporting, share your property and associated meters with the City of Seattle.

☐ Go to the Sharing Tab and click Share (or Edit Access to) a Property.

☐ Select the properties to share with Annual Reporting, City of Seattle.

☐ Under Choose Permissions, select the second option: “I need to give different permissions for different share requests, and/or I need to give Exchange Data permissions.” Click Continue.

☐ On the next screen, choose Exchange Data for each property.

HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484
8:00–5:00 Monday–Friday
On the Access Permissions page, enter the **City of Seattle Building ID** (this number is 1-5 digits and is not the Portfolio Manager Building ID). Find the number of the notification or warning letter. Contact the help desk if missing.

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

(You may need to scroll down to view all the information.)

- **Scroll down. For Share Forward, select “No”**.

**NOTE** If you have more than one building do the above steps for each building.

- **Click Apply Selections & Authorize Connection.**

- **When complete (for all buildings you are sharing), click Share Property(ies) again.**

- **Tomorrow**, look for a confirmation email from the City for each building shared.

**NOTE** If you do not get an email tomorrow, please check your “spam” or “junk” folder for it. If missing, contact the Help Desk.

**IMPORTANT** It is the responsibility of the building owner on record to confirm annual compliance with the City of Seattle Energy Benchmarking & Reporting ordinance.
Appendix A

Property Use Details Worksheet for ENERGY STAR Eligible Buildings

The property types on this worksheet are eligible to receive a 1 - 100 ENERGY STAR score, which is used to compare the property to similar properties nationwide and locally. If your building type is listed below and can receive a rating, the use details for it below are required for Seattle’s law and when applying for ENERGY STAR certification.

Please Note:
- Some buildings have multiple uses (e.g. office, data center, and parking). Complete the fields below for each major use in the building.
- Portfolio Manager “default values” will result in an approximate 1-100 score. Accurate data must be filled in later to accurately measure the building’s energy performance.
- If your building type is not listed below, it will receive an Energy Use Intensity (EUI) score, which is a measure of the energy use per square foot. These buildings are only required to list gross floor area.

<table>
<thead>
<tr>
<th>Bank Branch</th>
<th>Courthouse</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Gross Floor Area</td>
</tr>
<tr>
<td></td>
<td>Weekly Operating Hours</td>
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<td></td>
<td>Number of Computers</td>
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<tr>
<td></td>
<td>Number of Workers on Main Shift</td>
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<tr>
<td></td>
<td>Percent That Can Be Heated</td>
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<tr>
<td></td>
<td>Percent That Can Be Cooled</td>
</tr>
</tbody>
</table>

Data Center

<table>
<thead>
<tr>
<th>Gross Floor Area</th>
<th>IT Energy Configuration</th>
<th>UPS System Redundancy</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Cooling Equipment Redundancy</td>
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Financial Office

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<thead>
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<th>Gross Floor Area</th>
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<tr>
<td></td>
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<td>Percent That Can Be Heated</td>
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<td>Percent That Can Be Cooled</td>
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Hotel

<table>
<thead>
<tr>
<th>Gross Floor Area</th>
<th>Hours Per Day Guests On-Site</th>
<th>Number of Workers on Main Shift</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Number of Rooms</td>
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<tr>
<td></td>
<td>Number of Guest Meals Served Per Year</td>
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<tr>
<td></td>
<td>Cooking Facilities</td>
<td></td>
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<tr>
<td></td>
<td>Number of Computers</td>
<td></td>
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<td></td>
<td>Number of Commercial Refrigeration/Freezer Units</td>
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<td>Percent That Can Be Heated</td>
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<tr>
<td></td>
<td>Type of Laundry Facility</td>
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<tr>
<td></td>
<td>Amount of Laundry Processed On-Site Annually</td>
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<tr>
<td></td>
<td>Full Service Spa Floor Area</td>
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</tbody>
</table>

School District Name

Tip: For buildings with multiple tenants with the same use (i.e. several offices), enter the uses separately only when the total weekly operating hours among tenants differs by more than 10 hours.
<table>
<thead>
<tr>
<th>Medical Office</th>
<th>Non-Refrigerated Warehouse</th>
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<tr>
<td></td>
<td>Gross Floor Area</td>
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<td>Weekly Operating Hours</td>
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<td>Number of Walk-in Refrigeration/Freezer Units</td>
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<td></td>
<td>Percent That Can Be Heated</td>
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<tr>
<td></td>
<td>Percent That Can Be Cooled</td>
</tr>
<tr>
<td>Multifamily</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Gross Floor Area</td>
</tr>
<tr>
<td></td>
<td>Weekly Operating Hours</td>
</tr>
<tr>
<td></td>
<td>Number of Workers on Main Shift</td>
</tr>
<tr>
<td></td>
<td>Total Number of Residential Living Units (RLUs)</td>
</tr>
<tr>
<td></td>
<td>Number of RLUs in a Low-rise Setting (1-4 stories)</td>
</tr>
<tr>
<td></td>
<td>Number of RLUs in a Mid-rise Setting (5-9 stories)</td>
</tr>
<tr>
<td></td>
<td>Number of RLUs in a High-rise Setting (10+ stories)</td>
</tr>
<tr>
<td></td>
<td>Number of Bedrooms</td>
</tr>
<tr>
<td></td>
<td>Resident Population Type (None, Student, Military, Senior/Independent, Special, Other)</td>
</tr>
<tr>
<td></td>
<td>Government Subsidized Housing (Y or N)</td>
</tr>
<tr>
<td></td>
<td>Number of Laundry Hookups in All Units</td>
</tr>
<tr>
<td></td>
<td>Number of Laundry Hookups in Common Area(s)</td>
</tr>
<tr>
<td></td>
<td>Percent That Can Be Heated</td>
</tr>
<tr>
<td></td>
<td>Percent That Can Be Cooled</td>
</tr>
<tr>
<td>Office</td>
<td></td>
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<tr>
<td></td>
<td>Gross Floor Area</td>
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<tr>
<td></td>
<td>Weekly Operating Hours</td>
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<tr>
<td></td>
<td>Number of Computers</td>
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<tr>
<td></td>
<td>Number of Workers on Main Shift</td>
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<tr>
<td></td>
<td>Percent That Can Be Heated</td>
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<tr>
<td></td>
<td>Percent That Can Be Cooled</td>
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<tr>
<td>Senior Care Community</td>
<td></td>
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<tr>
<td></td>
<td>Gross Floor Area</td>
</tr>
<tr>
<td></td>
<td>Maximum Resident Capacity</td>
</tr>
<tr>
<td></td>
<td>Average Number of Residents</td>
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<tr>
<td></td>
<td>Number of Residential Living Units</td>
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<tr>
<td></td>
<td>Number of Workers on Main Shift</td>
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<tr>
<td></td>
<td>Number of Computers</td>
</tr>
<tr>
<td></td>
<td>Percent That Can Be Heated</td>
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<tr>
<td></td>
<td>Percent That Can Be Cooled</td>
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<tr>
<td></td>
<td></td>
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<tr>
<td>Supermarket/Grocery Store</td>
<td></td>
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<tr>
<td></td>
<td>Gross Floor Area</td>
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<tr>
<td></td>
<td>Weekly Operating Hours</td>
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<tr>
<td></td>
<td>Number of Workers on Main Shift</td>
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<tr>
<td></td>
<td>Number of Computers</td>
</tr>
<tr>
<td></td>
<td>Number of Cash Registers</td>
</tr>
<tr>
<td></td>
<td>Cooking Facilities</td>
</tr>
<tr>
<td></td>
<td>No. of Open or Closed Refrigeration/Freezer Units</td>
</tr>
<tr>
<td></td>
<td>No. of Walk-in Refrigeration/Freezer Units</td>
</tr>
<tr>
<td></td>
<td>Percent That Can Be Heated</td>
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<tr>
<td></td>
<td>Percent That Can Be Cooled</td>
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<tr>
<td>Wholesale Club/Supercenter</td>
<td></td>
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<tr>
<td></td>
<td>Gross Floor Area</td>
</tr>
<tr>
<td></td>
<td>Exterior Entrance to the Public</td>
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<tr>
<td></td>
<td>Weekly Operating Hours</td>
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<td></td>
<td>Number of Workers on Main Shift</td>
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<td>Number of Computers</td>
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<td></td>
<td>Number of Cash Registers</td>
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<tr>
<td></td>
<td>No. of Open or Closed Refrigeration/Freezer Units</td>
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<tr>
<td></td>
<td>Number of Walk-in Refrigeration/Freezer Units</td>
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<tr>
<td></td>
<td>Percent That Can Be Heated</td>
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<tr>
<td></td>
<td>Percent That Can Be Cooled</td>
</tr>
</tbody>
</table>
Appendix B
Entering Utility Data Manually into Portfolio Manager

If you only have a couple meters serving your building that you pay and don’t mind hand entering the data, this option may work. We don’t recommend it for multifamily or commercial with many tenants, as you would need to get permission from all tenants to collect their bills.

☐ Log in to your Portfolio Manager account and click on your property.

1. Add Energy Meters

☐ In your Property Profile page, click on the Meters tab and select Add Another Meter.

☐ Select the types of fuel in your facility. For each type, enter the number of meters for that type. Click Get Started.
On the **About Your Meters** section, click in the table to enter meter details.

- Select the **correct unit** for the fuel type:
  1. Seattle City Light Electric = KWH
  2. Puget Sound Energy Natural Gas = Therms
  3. Seattle Steam = kLbs

- **Enter the Date Meter Became Active.** This is the date that the first bill was issued for the meter. (Note: if you are unsure of the first bill date, use your best guess).

- Select **In Use** if the meter is currently in use.
  - Leave the **Date Meter Became Inactive** empty since meter is currently in use.
  - Only select **Enter as Delivery** if the energy source is delivered to you, such as fuel oil or propane from a truck, as opposed to metered usage.

- If you need to add another **meter**, select **Add Another Entry**.

- When done entering meters, click **Continue**.

---

**2. Enter Energy Usage**

- On the next page, click in the table to **enter the bill dates and usage** for each month (cost is optional). Click **Add Another Entry** to add more months.

- Once you have entered at least 12 consecutive months of data for the year required, click **Finish Meter Set Up**.

- On the next page, select the meter(s) to be included in the energy metrics.

- Then select “These meter(s) account for the total energy consumption for this property” and click **Apply Selections**.

- You will be taken back to the **Property Profile** page.

- **Continue with Steps 4–6** to finish benchmarking and report to the City of Seattle.
Appendix C

Resources

City of Seattle Energy Benchmarking Help Desk
EnergyBenchmarking@seattle.gov
(206) 727-8484

ENERGY STAR Portfolio Manager Login
www.energystar.gov/benchmark
*If account is locked, call ENERGY STAR at 888-782-7937 to reset password.*

Seattle Office of Sustainability and Environment (OSE)
Energy Benchmarking website
www.seattle.gov/EnergyBenchmarking

Utility Contact Information

**Seattle City Light**
*Email* scl_portfolio_manager@seattle.gov
*Phone* (206) 684-7557
*Website* www.seattle.gov/light/accounts/energyusage

**Puget Sound Energy**
*Email* mydata@pse.com
*Phone* (425) 456-2494
*Website* http://pse.com/accountsandservices/YourProperty/Pages/Automated-Benchmarking.aspx

**Seattle Steam**
*Phone* (206) 623-6366 or (206) 658-2025
*Website* www.seattlesteam.com/energy-star-reporting.htm