Utility Data Auto Upload User Guide

To ensure compliance with Columbus' Energy & Water Benchmarking Ordinance, covered building owners are required to benchmark their energy and water usage in ENERGY STAR® Portfolio Manager® and report it to the City. To streamline the process for building owners, the City of Columbus Department of Public Utilities is offering auto-upload of electric and water utility bills directly into users Portfolio Manager accounts. Once the connection is established, utility data will be automatically updated on a monthly basis and imported into the users Portfolio Manager account. Please follow the steps below to compete the setup process.

Section 1: ENERGY STAR Portfolio Manager
If you are already benchmarking your property in Portfolio Manager, you can skip to Step 3 below.

Step 1: Access ENERGY STAR Portfolio Manager

- Create an ENERGY STAR Portfolio Manager account or login to an existing account.
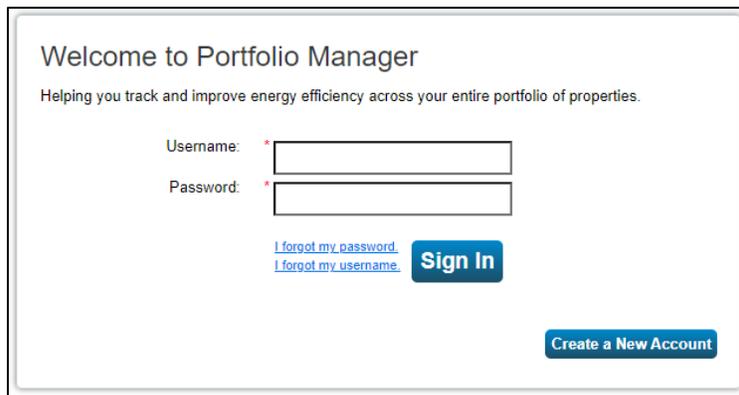
Step 2: Add a Property to Portfolio Manager

- Within the *MyPortfolio* tab click *Add a Property*.
- Choose Columbus Building ID from the *Standard IDs* dropdown menu.
    - Find your Building ID and input it to Portfolio Manager.
- After the property use details have been entered, click *Add Property.*

Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See this FAQ if you need help finding your Standard ID.

Standard ID(s):

| Columbus Building ID ⌄ | ID: [   ] |

➕ Add Another

Step 3: Create a Virtual Electric Meter in Portfolio Manager

- If you are an existing Portfolio Manager user and have a property that has more than one electric meter it is important to note that the new virtual meter for utility connection will be a singular aggregate meter and will replace what may have previously been multiple electricity meters. For example, 3 prior electric meters will be replaced with 1 new virtual meter for utility connection.
  - To avoid duplication of electricity records, it is recommended that you delete all of the existing electricity meters and follow the process below to create a new virtual electric meter. Please note that the new virtual electric meter will be able to provide historical data back to January 1, 2021.
- Navigate to the *Energy* tab and choose *Add A Meter.*

| Summary | Details | Energy | Water | Waste & Materials | Goals | Design |

Meters - Used to Compute Metrics (1)   **Add A Meter**

Change Meter Selections

🖧 View as a Diagram

- Select *Electric, purchased from the grid*, and *1*. Click *Get Started*.

- On the next page, select *kWh* from the *Units* column and enter the date the meter became active or, if unknown, choose January 1st of the year the building was built.

- Click *Create Meters*, skip the meter usage page, and click *Continue.*
- Select the radial button for "These meter(s) account for the total energy consumption for this property." Click Apply Selections to finalize the meter setup.

Note: The City of Columbus Department of Public Utilities also offers automated utility connection for water. Similar to the process for setting up a Virtual Electric Meter, please create a Virtual Water Meter by setting up a Water Meter in the Water tab of Portfolio Manager. Water meters should be set up to track consumption in ccf.

Section 2: Automated Utility Connection

Once your ENERGY STAR Portfolio Manager account has been setup and your property has meter(s) associated with it, please follow the steps below to complete the automated utility setup. This service is available for both single-tenant buildings as well as multi-tenant buildings where utility bills need to be aggregated.

Step 1: Connect and Sync with ENERGY STAR Portfolio Manager

- Register an account with the City of Columbus Department of Public Utilities.
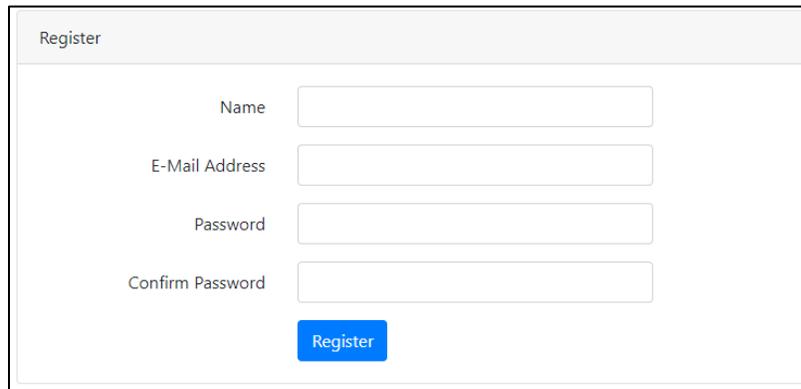
- Login to your account by entering your credentials from the prior step.
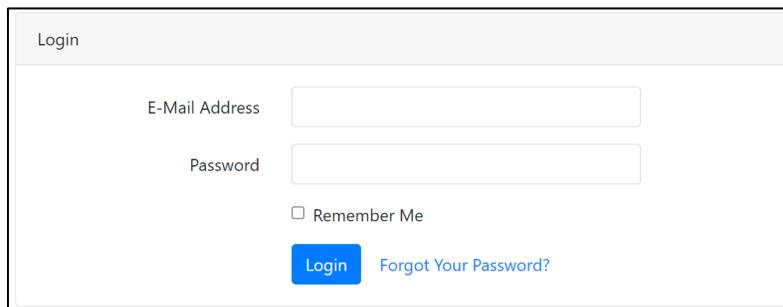
- Enter your **ENERGY STAR Portfolio Manager** credentials and click *Connect Account.*
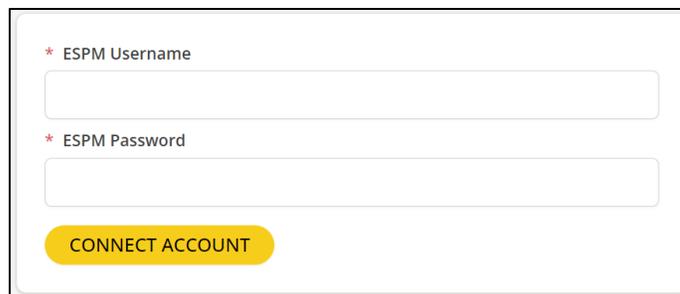
- Within the list of buildings, click *connect* on the building you would like to sync.

Step 2: Add Properties

- Type in the address of your building as it is documented on your utility bill and click the magnifying glass to search.

- Review the search results and select which unit(s) you want to automate utility data exchange for.
  - If you are connecting one utility account, find the specific account and click *Claim*.

- o Now, enter the utility bill account # and click the *Claim* button.

- o If you are connecting multiple accounts, choose *Select All* or *Select Multiple Units.*
- o At the bottom of the screen, choose *Claim Properties* to advance to the next step.

Step 3: Account Verification

In this section you will verify the accounts you want to connect. Due to utility data privacy measures, the next steps depend on how many accounts you are looking to connect.

PM BUILDING ID	REQUEST GROUP	STATUS	PROPERTY	ACCOUNT #	
CONNECT PROPERTY	Group #1	Pending	115 NOBLE ST APT 2 Columbus, OH 43215	VERIFY	REQUEST FROM TENANT
		Pending	115 NOBLE ST APT 3 Columbus, OH 43215	VERIFY	REQUEST FROM TENANT
		Pending	115 NOBLE ST APT 1 Columbus, OH 43215	VERIFY	REQUEST FROM TENANT

- *Connecting 2 or 3 accounts*: If you know the account #'s for the accounts, you can enter them within the *Verify* row of each unit. You will need to verify each of the accounts in order to complete the automated connection.
    - If you do not know the account #'s, select *Request from Tenant* in each applicable row.
    - Enter the email address of the tenant associated with each account and click *Send.*

- *Connecting 4 or more accounts*: Enter the account # for one of the accounts within the *Verify* row of one of the units. Only one account verification is needed but the account # entered needs to correlate with the unit being verified.
    - If you do not know the account #, select *Request from Tenant* in one of the rows.
    - Enter the email address of the tenant associated with the account and click *Send.*

- After a property has been verified, click *Connect Property* to finalize the automated utility connection.
    - Select the property and meters you would like to connect with the chosen group and click "CONNECT" to complete the auto-upload process.

Once the auto-upload connection has been established, building owners will receive updated electric and/or water data directly in their ENERGY STAR Portfolio Manager account on a monthly basis.

Section 3: Benchmarking Help Desk

If you'd like assistance with the steps outlined above, please reach out to us at:

Email: columbus.utilities@touchstoneiq.com
Web: Benchmarking Webpage