HOW TO GUIDE

For Non-Residential Buildings

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

Contents

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What is Benchmarking?

Benchmarking tracks the total electricity, natural gas, steam, and/or water used in a building. The U.S. EPA's ENERGY STAR Portfolio Manager is the standard tool 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.
- **ENERGY STAR** rating, which (for eligible buildings) compares your facility to similar buildings nationwide, adjusting for use, occupancy, weather, and other factors. These ratings are on a 1-100 scale, with a higher score indicates a more efficient building.
- **Overall water usage**.

See How Philadelphia's Largest Buildings Energy Use Stacks Up!

The City of Philadelphia has published benchmarking reports summarizing findings from energy and water usage data of non-residential buildings in past years. These reports are available at https://www.phila.gov/documents/energy-benchmarking-reports/.

Annual public disclosure of a subset of benchmarking energy and water data for all buildings 50,000 square feet or larger is required by the City's benchmarking law. Data from the past three years can be found on the Energy Benchmarking Visualization Tool, a web-based tool assist building owners and operators understand how their building stacks up to its peers around Philadelphia. The tool can be found at http://visualization.phillybuildingbenchmarking.com.
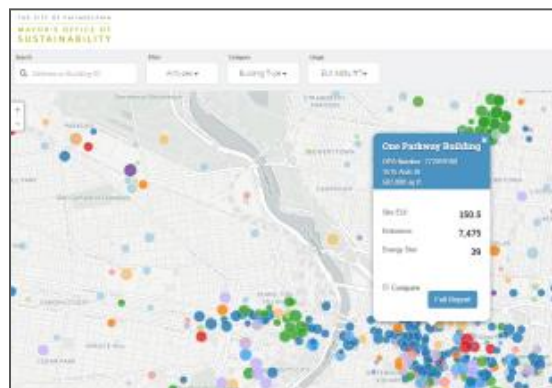
The guide below is for buildings that are new to compliance and do not have a Portfolio Manager account. If you currently benchmark your building using Portfolio Manager, visit http://www.phillybuildingbenchmarking.com/nonresidential/ for details on bringing your account into compliance for reporting of 2020 data.

Step 1 **Gather Building and Meter Information**

✓ Confirm the accuracy of the information provided about the building on the notification letter sent by the City of Philadelphia. This includes:

1. Official Building Address
2. Square Footage
3. Office of Property Assessment (OPA) Number

✓ Obtain the following details about the building's use

> **Need help?**
>
> Visit the benchmarking website at www.phila.gov/benchmarking or for Portfolio Manager help visit EPA's support website https://energystar-mesa.force.com/PortfolioManager/s/contactsupport
>
> If you still need assistance

1. The **primary use** of the building. For example: office, school, or house of worship.
2. The **gross floor area** of the building, not including parking area. *Please note: If property is an indoor parking garage then gross floor area includes the parking structure.*
3. Buildings eligible for ENERGY STAR scores (including offices, K-12 schools, and most warehouses) will need to fill in **additional fields** to earn this score. To confirm which space uses are eligible for ES certification, consult the EPA document at www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager/identify-your-property-type

✓ Obtain your bills for your energy and water meters from Jan 1 to Dec 31, 2020.

- **PECO** (Electric Meters)- PECO offers automatic transfer of aggregated electric usage data through its Smart Energy Usage Data Tool. Visit: http://www.peco.com/smartenergyusagedatatool
- **PGW** (Natural Gas Meters)- Customers should submit their data requests using completed data release authorization forms, and contact information (phone #) for the requestor via: PGWusage@pgworks.com; Fax: 215-684-6996 or Mail to Attn: Correspondence Department Philadelphia Gas Works P.O. Box 3500 Philadelphia, PA 19122
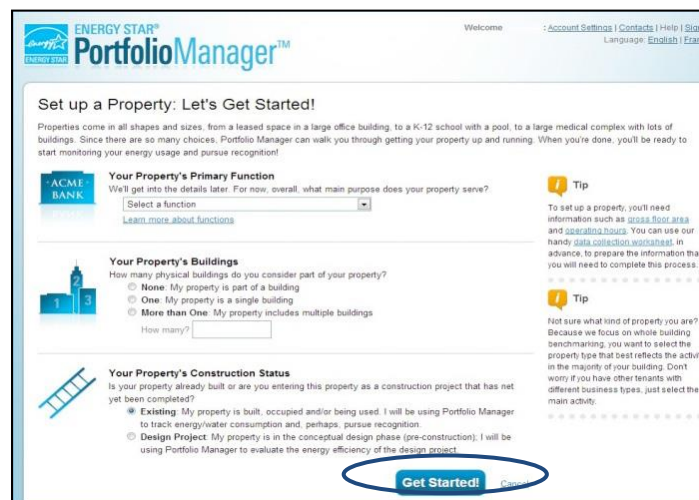
- **Philadelphia Water Department** (Water Meters)- Submit complete data authorization form to WaterBenchmarking@Phila.gov *if you do not have access to 2020 water bills*.
- **Vicinity Energy** (District Steam)- Vicinity offers automatic transfer of steam use information. Visit https://www.phillybuildingbenchmarking.com/wp-content/uploads/2022/01/Vicinity-Energy_Philadelphia-Benchmarking.pdf

Step 2 Setting up a Property in EPA Portfolio Manager

New Account
- ✓ Create a new account in Portfolio Manager at https://portfoliomanager.energystar.gov/pm/login.

    1. Click **Create New Account**.
    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!

- ✓ Answer the basic questions about you and your organization:

    1. For Reporting Units, choose "Conventional EPA Units (e.g., kBtu/ft²)."
    2. KEEP A RECORD of the Security Questions and Answers.

- ✓ After creating an account, log in. You will be prompted to set up a property. Answer questions on Set up a Property page and click **Get Started.**

✓ On the next page enter Basic Property Information including the building name, address (use official address), year built, occupancy, gross floor area (do not include parking) and check off any boxes that apply to your property, then click **Continue.**

Entering Building Use Details

✓ 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.

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

2. If you don't have all the information with you, use Default values. You can change these numbers later, but the defaults work well for "typical" buildings and are accepted by the City for benchmarking.

3. *Current As Of* date refers to the first day you'll be benchmarking the building. **This date must be on or before January 1, 2022.**

▼ Building Use   Edit Name

Office refers to buildings used for the conduct of commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area (GFA) should include all space within the building(s) including offices, conference rooms and auditoriums, break rooms, kitchens, lobbies, fitness areas, basements, storage areas, stairways, and elevator shafts.

If you have restaurants, retail, or services (dry cleaners) within the Office, you should most likely include this square footage and energy in the Office Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

- If it is a Property Use Type that can get an ENERGY STAR Score (note: Retail can only get a score if it is greater than 5,000 square feet)
- If it accounts for more than 25% of the property's GFA
- If it is a vacant/unoccupied Office
- If the Hours of Operation differ by more than 10 hours from the main Property Use

More on this rule.

Property Use	Value		Current As Of	mporary ue
★ Gross Floor Area	* 600,000	Sq. Ft. ▼	1/1/1980 📅	☐
★ Weekly Operating Hours		☐ Use a default	1/1/1980 📅	☐
★ Number of Workers on Main Shift		☐ Use a default	1/1/1980 📅	☐
★ Number of Computers		☐ Use a default	1/1/1980 📅	☐
★ Percent That Can Be Heated	▼	☐ Use a default	1/1/1980 📅	☐
★ Percent That Can Be Cooled	▼	☐ Use a default	1/1/1980 📅	☐

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

✓ If your building has multiple uses, add more space uses to your property by selecting an option in the drop down menu **Add Another Type of Use** at the **top of the screen**, and then click "Add". This will open up a different list of attributes for that particular space type. **For more information on when to create a separate Property Use, please see** *https://energystar-mesa.force.com/PortfolioManager/s/article/When-should-I-create-separate-Property-Uses-1600088548691*

✓ When you have finished adding uses and details, click **Add Property** at the bottom of the page.
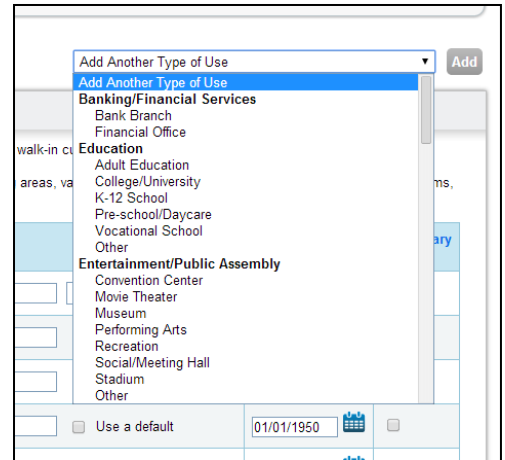
Need to Make Building Use Changes?

To edit building use details later, select **Correct Mistakes** from Action drop-down in the *Building Details* tab.
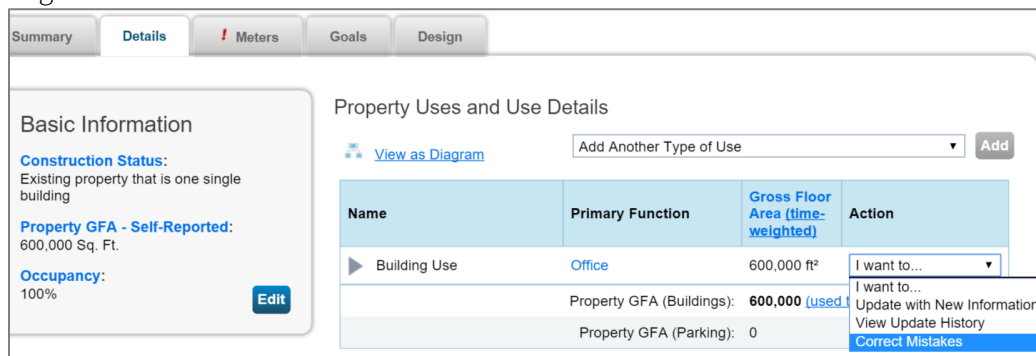
Step 3 Enter Energy and Water Usage Data

Adding Energy Meters

✓ In your Property Profile page, click on the Energy tab and select **Add A Meter**.

Need Access to your Utility Data?
Go to Page 4 & 5 of this Guide

✓ Select the types of fuel in your facility. For each type, enter the number of meters for that particular fuel type. Then click **Get Started**.
  • All of the property's Energy Meters are required including Electric, Natural Gas, Fuel Oil and Steam.

✓ On the About Your Meters section, **click in the table** to enter data for each meter:
  1. Select **Units** for each meter based on your bill.
  2. Enter **Date Meter became Active**. *Date must be on or before January 1, 2022.*
  3. Make sure **In Use** box is checked.

✓ Then click **Create Meters**.

If you would like to enter your bills later, you can page 9 and continue to page 10. Instructions on how to add data after your meters are created go to
https://www.phillybuildingbenchmarking.com/wp-content/uploads/2022/01/2022-Update-Guide.pdf.

or

https://energystar-mesa.force.com/PortfolioManager/s/article/How-do-I-add-energy-meter-data-bills-1600088544349.

✓ One the next screen, **Click to Add an Entry** in the table to begin entering the bill start and end date and usage for each month. *Cost is optional, and will not be shared with the City.*

✓ To add another bill date, click **Add Another Entry** located underneath the table.

You can now copy and paste from Excel right into the meter table. To learn more: https://energystar-mesa.force.com/PortfolioManager/s/article/How-do-I-Copy-and-Paste-Data-into-my-Meter-1600088526075

Be sure to enter data encompassing every day of 2022, from January 1 through December 31. Depending on your bill cycle, this may require you to enter usage for bills that begin in 2021 or end in 2023.

✓ Once you have entered 2022 data for your first energy meter, click on the **grey arrow** next to the meter below the data you have entered to add data for another meter:

✓ Once you have finished entering data for all energy meters on this page, click **Continue**.

✓ On the next page, click the **check boxes** next to each of your meters, then select the **"These meter(s) account for the total energy consumption for this property"** button and click **Apply Selections**.

✓ You will be taken back to the Property Profile page where you can begin to analyze your results.

Adding Water Meters

✓ In your Property Profile page, click on the Water tab and select **Add A Meter**.

Need Access to your Utility Data?
Go to Page 4 & 5 of this Guide

✓ Select "Municipally Supplied Potable Water" then the appropriate type of meter and number of meters for your facility. For each type, enter the number of meters for that particular fuel type. Then click **Get Started**.
Water usage, if applicable, is required by law.

✓ Repeat steps for filling out the "About your meters," "Adding meter entries" and "Select Meters to Include in Metrics" for water as you did for Energy Meters.

Step 4 Add Office of Property Assessment (OPA) Number

✓ Your **OPA number**, also known as Philadelphia Building ID in Portfolio Manager, should have been mailed to you as part of your initial compliance notice. **If you don't have the OPA Number for your property**, you can obtain it by searching the OPA site at http://property.phila.gov/ or https://atlas.phila.gov/. If you have trouble finding the number contact the Office of Sustainability at benchmarkinghelp@phila.gov.

Your OPA/ Philadelphia Building ID number is REQUIRED by law to be in your benchmarking report.

✓ Click on a property and enter the Details tab. There, you will see a box that says *Unique Identifiers (IDs).* Click **Edit.**

✓ On the next page, scroll to the bottom to the box that says **"Standard IDs."** In the drop-down box on the left, find **Philadelphia Building ID.** Select this, and enter your OPA number in the box to the right. Then click Save.

> *Tip* Multiple OPA numbers? You can add them all on this screen! Just separate each unique OPA number with a semicolon.

Step 5 Check for Data Errors and Confirm Energy Use Intensity (EUI)/ENERGY STAR Score

✓ On the **My Portfolio/ Summary** page of your property, click on **Check for Possible Errors**.

✓ You will now be able to run the Data Quality Checker for your property. In the box titled "Select Timeframe & Run Check", select **Dec 31 and 2022** for **Year Ending** and then click **Run Checker**.

> ⚠ **There is not 12 full months of meter data.**
>
> **Problem**: The following meters do not have 12 full calendar months of energy bills for the year selected (01/01/2015 - 12/31/2015).
>
> - Potable Indoor Meter (missing bills for 01/01/2015 - 01/01/2016)
>
> **What to do**:
>
> - If you think this is a mistake, click the links above to review the energy bills entered for each meter and make corrections if necessary.

You may IGNORE the waste meter alert. Waste is not required.

MyPortfolio	Sharing	Planning	Reporting	Recognition

Data Quality Checker for Test Office Building 2016

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your ye links to view or correct your data as needed.

Select Timeframe & Run Checker

We check data for a full year (12 months) of meter consumption and Property Use Details (called a Metric Year). Select a Year Ending Date and click "run checker" to see possible data issues.

Year Ending: * [Dec 31 ▾] [2015 ▾]   **Run Checker**

Cancel

✓ On the next screen Portfolio Manager will indicate whether or not you have errors and where the possible errors might be. *Please follow instructions on the screen in order to resolve these issues then re-run the checker by following steps above to see if the errors are resolved.* If you are still receiving an error, please visit: http://www.phillybuildingbenchmarking.com/support or contact benchmarkinghelp@phila.gov for assistance.

✓ If you receive no errors or have resolved your errors, to **Confirm** that you have entered all information correctly by viewing the box in the top-right corner of the **Summary** tab of your building's profile. Completed building profiles will include a number in either the Source EUI or ENERGY STAR Score fields:
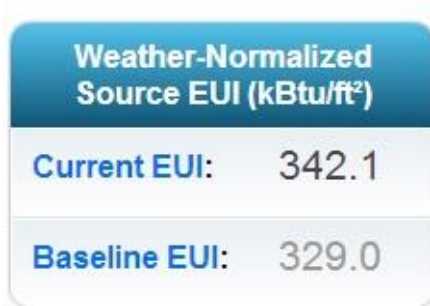
If you do not see a number for either Source EUI or ENERGY STAR, you are able click on N/A to see where the errors are and how to solve them. If you still cannot resolve the error, please contact the Office of Sustainability at benchmarkinghelp@phila.gov for assistance.

Step 6 Report Your Data to the City of Philadelphia

Accessing the Philadelphia Custom Reporting Template 2022

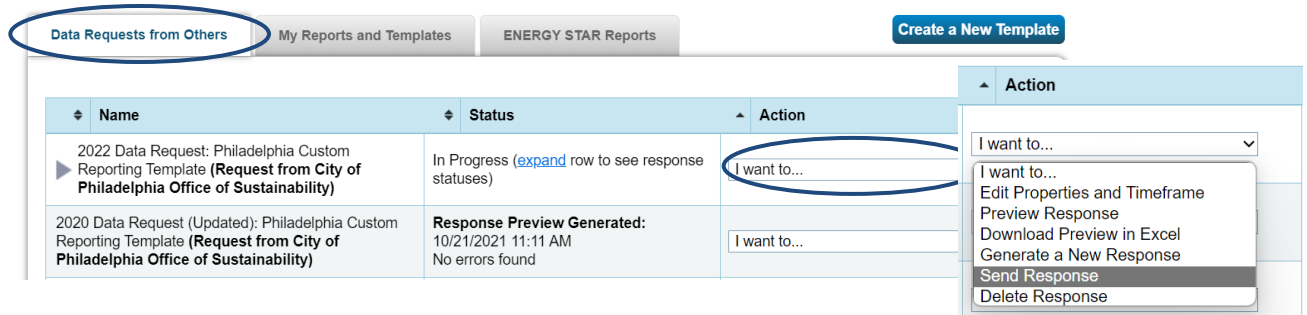✓ Go to www.phila.gov/benchmarking and click on **Report Data** located at the top menu bar.
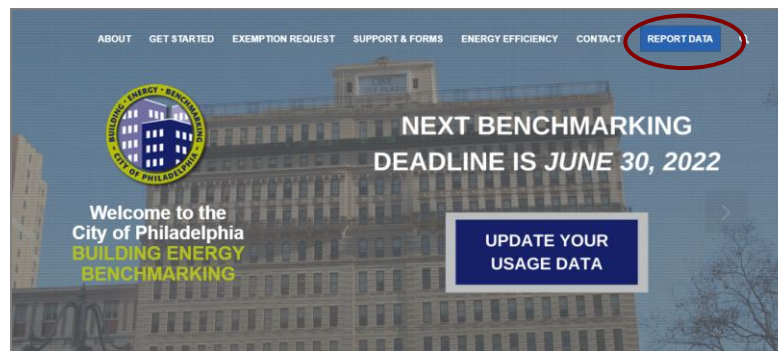
Preparing a Response

✓ You will be taken to the Respond to Data Request page. You may have to login to Portfolio Manager.

✓ Scroll down to the bottom of the screen and select your **property(s)** in the drop-down boxes next to Properties and click on **Generate Response Preview**.

Submitting a Response

✓ You will be taken to Reporting tab. Scroll down and select "Data Requests from Others"

Data Quality Error: If the data or account has any issues an alert message will pop-up above the table. Please click "read more" to fix the issue before sending or contact benchmarkinghelp@phila.gov if you are not able to resolve the issue and then repeat steps above.
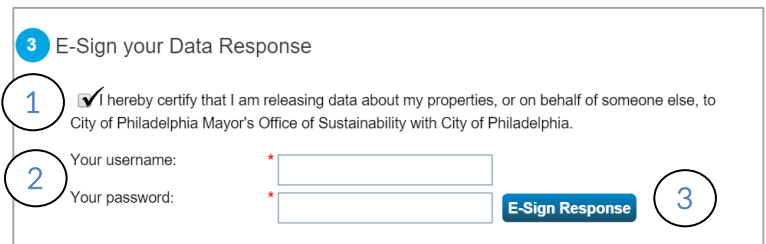
✓ If there are no data quality alerts, scroll down and select Data Requests from Others. Find the item that says **"Philadelphia Custom Reporting Template for 2022"**. Select **Send Response** from the Action drop-down list next to the report name.

✓ One next screen, scroll down to **#3 E-Sign Your Data Response:**

1. Check the box **"I hereby certify…"**
2. Enter your **Login Information**
3. Click **E-Sign Response**

✓ The screen will refresh then scroll down to the bottom (you will see a green text that says "Signed"), then click **Send Data.** You will receive a confirmation email informing you that your data has been submitted to the City of Philadelphia.