



## Updating Your Account for 2022 Compliance

The following pages will walk you through the process of updating your Portfolio Manager account to report energy and water usage for 2022. If this is your first time complying with the City's benchmarking law, please consult the How-To Guide at [phillybuildingbenchmarking.com](http://phillybuildingbenchmarking.com) for detailed instructions on setting up an account.

**The deadline for 2022 reporting is June 30, 2023.**

### Need help?

If you need help with Portfolio Manager go to <https://portfoliomanager.zendesk.com/hc/en-us/> or visit the benchmarking website at [www.phila.gov/benchmarking/support](http://www.phila.gov/benchmarking/support)

If you need further assistance, email [benchmarkinghelp@phila.gov](mailto:benchmarkinghelp@phila.gov)

## Step 1 Gather 2022 Energy and Water Usage

- ✓ Gather monthly aggregated **whole-building** energy (i.e. electricity, natural gas, steam, fuel oil #2) and water usage from bills covering January 1 to December 31, 2022.
- ✓ If you need aggregated whole-building energy or water usage or do not have access to the bills, you can request it from utilities directly. Visit [www.phillybuildingbenchmarking.com/utility-data-access/](http://www.phillybuildingbenchmarking.com/utility-data-access/) for more information.




### Please note:

- Buildings are required to report whole-building monthly usage data even if your tenants/ condo owners are responsible for their energy bills. If you do not have access to your tenants/ condo owners usage, visit [www.phillybuildingbenchmarking.com/utility-data-access/](http://www.phillybuildingbenchmarking.com/utility-data-access/) to find out how to obtain that data.
- For PECO's Smart Energy Usage Data Tool users (free online access to whole-building electricity usage data) *you must request data using the online tool annually*. For more information see [www.peco.com/WaysToSave/ForYourBusiness/Pages/EnergyUsageDataTool.aspx](http://www.peco.com/WaysToSave/ForYourBusiness/Pages/EnergyUsageDataTool.aspx).

## Step 2 Login to Portfolio Manager

- ✓ Go to [phillybuildingbenchmarking.com](http://phillybuildingbenchmarking.com) and click on **LEARN MORE** under Non-Residential or Multifamily.

Reporting Deadline for Submitting Calendar-Year 2015 Energy and Water Data is June 30, 2016.

 <b>NON-RESIDENTIAL</b> Find out more information on how to benchmark your non-residential building and to login into ENERGY STAR Portfolio Manager. <a href="#">LEARN MORE &gt;</a>	 <b>MULTIFAMILY</b> Find out more information on how to benchmark your residential building and to login into ENERGY STAR Portfolio Manager. <a href="#">LEARN MORE &gt;</a>	 <b>REPORT</b> Updated energy-and water-meter data in Portfolio Manager? REPORT your data to the City of Philadelphia. <a href="#">MANAGE &amp; REPORT &gt;</a>
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- ✓ On the next page scroll down the page and click on **LOGIN or SIGN UP** button. Then enter your username and password on the next page.

**ALREADY BENCHMARKING?**  
View the guide below to update 2015 energy and water data to your account.  
[DOWNLOAD PDF](#)

**NEW TO BENCHMARKING?**  
Click below to get started.  
[DOWNLOAD PDF](#)

**NEED TO SIGN UP OR LOGIN TO PORTFOLIO MANAGER?**  
Click below for Portfolio Manager's website.  
[LOGIN OR SIGN UP](#)

**READY TO SUBMIT DATA?**  
Find out how to report your data to the City of Philadelphia below.  
[DOWNLOAD PDF](#)

Growing Stronger:  
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Philadelphia Farmers' Markets

Measuring Philadelphia's Carbon Footprint

Search

For LOST Portfolio Manager Usernames or Passwords, on the login page click on

[I FORGOT MY PASSWORD](#)

or

[I FORGOT MY USERNAME](#)

Welcome to Portfolio Manager

Helping you track and improve energy efficiency across your entire portfolio of properties.

Username: \*

Password: \*

[I forgot my password.](#)

[I forgot my username.](#)

[Sign In](#)

## Step 3 Update Your Meter Information/ Meter Bills

### Updating Energy Meters

- ✓ Find your property on the **My Portfolio** tab and click on the property name to enter its profile.
- ✓ On the next page select the **Energy** tab, then click **Enter Your Bills**.

Summary Details **Energy** Water Goals Design

Meter Summary

1 Energy Meters Total

1 - Used to Compute Metrics

[Add A Meter](#)

Current Energy Date Not Available

[Enter Your Bills](#)

Four Ways to Enter Bill Data

1. Manually
2. Use our [simple spreadsheet](#) (one meter) to upload or Copy/Paste
3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)
4. Find an organization to electronically enter your data into Portfolio Manager

Your Property is: [Edit](#)

A Single Building

Energy Use by Calendar Month

Site Energy (kBtu)

Jan-15 Feb-15 Mar-15 Apr-15 May-15 Jun-15 Jul-15 Aug-15 Sep-15 Oct-15 Nov-15

Electric - Grid

Export Data by Calendar Month

Meters - Used to Compute Metrics (1)

[Change Meter Selections](#)

[View as a Diagram](#)

Name	Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter	18494717	Electric - Grid	12/01/2015	Yes

[Add A Meter](#)

[Download Annual Totals by Meter](#)





- ✓ On the next page, next to **Meter Selection**, select the first meter for which you wish to enter 2022 data.

Manage Bills (Meter Entries) for

Meter Selection: Electric Grid Meter [Delete Meter](#)

Basic Meter

Monthly Entry

- ✓ Scroll to the bottom of the following page and select **Add Another Entry** to begin entering information for 2022.

<input type="checkbox"/>	8/1/2014	9/1/2014	1,000		<input type="checkbox"/>	<input type="checkbox"/>	9/15/2014 City of Philadelphia Benchmarking
<input type="checkbox"/>	9/1/2014	10/1/2014	1,000		<input type="checkbox"/>	<input type="checkbox"/>	9/15/2014 City of Philadelphia Benchmarking

[Delete Selected Entries](#) [Add Another Entry](#) [Learn how to copy/paste](#) [Download to Green Button XML](#) [Download to Excel](#)

Upload data in bulk for this meter:

You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

*For each energy and water meter, you must enter 12 months of data encompassing **EVERYDAY** in 2022, Jan 1 to Dec 31, 2022.*

- ✓ Once you have completed entering 12 months of 2022 data for your first meter, click **Save Bills**.

[Delete Selected Entries](#) [Add Another Entry](#) [Learn how to copy/paste](#) [Download to Green Button XML](#) [Download to Excel](#)

Upload data in bulk for this meter:

You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

[Cancel](#)

- ✓ Then select your next meter by scrolling to the top screen under Meter Selection and repeat steps above for each of your energy meters.

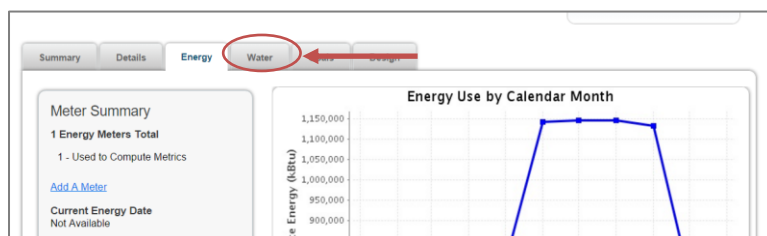


## Updating Water Meters

- ✓ After you are finished entering your energy meters, scroll to top of the Manage Bill page and click on **Meter Selection**, select your water meter. The name of the meter will typically be **Potable Indoor Meter**.

Or

If you are on in your property's profile page click on **Water** tab



- ✓ Scroll to the bottom of the following page and select **Add Another Entry** to begin entering information for 2022.
- ✓ Once you have completed entering 12 months of 2022 data for your meter, click **Save Bills**.
- ✓ If you have multiple water meters, then select your next meter at the top of the screen and repeat steps above for each of your water meters.

Still having trouble updating your meter bill entries?

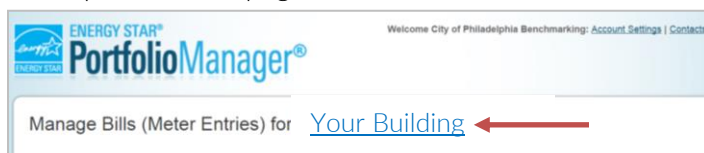
Visit <https://portfoliomanager.zendesk.com/hc/en-us/categories/201357937-Meters> for assistance.

### PECO and/or Vicinity Customer?

These utilities now offer **automated data transfer** for all customers. Visit <http://www.peco.com/smartenergyusagedatatool> or [Vicinity Energy Philadelphia Benchmarking.pdf](#) ([phillybuildingbenchmarking.com](http://phillybuildingbenchmarking.com)) for details!

## Step 4 Check for Data Errors

- ✓ Once you are finished entering and saving your meter bills and are in the Manage Bills page, click on **your property's name** at the top of the webpage.



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

The screenshot shows the 'Summary' tab of the 'My Portfolio' page. It includes sections for Notifications, Property Profile, Source EUI Trend, and a Metrics Summary table. The 'Check for Possible Data Errors' button is located in the 'Check for Possible Data Errors' section and is highlighted with a red arrow.

Metric	Baseline (Dec 2012)	Current (Sep 2014)	Change
ENERGY STAR score (1-100)	100	100	0.0 (0%)
Source EUI (kBtu/ft²)	2.8	4.5	1.700 (7%)
Site EUI (kBtu/ft²)	0.9	3.3	2.400 (7%)
Energy Cost (\$)	0.00	Not Available	N/A
Total GHG Emissions (Metric Tons CO2e)	5.9	13.9	8.0 (135.8%)

- ✓ In the box on the next page, select **Dec 31 and 2022** for **Year Ending** and then click **Run Checker**.

The screenshot shows the 'Data Quality Checker for School Test 2013' page. It includes a 'Select Timeframe & Run Checker' section with a 'Year Ending' dropdown set to 'Dec 31' and a 'Run Checker' button. The 'About Timeframes' section explains that the checker needs one full calendar year of Property Use Details and meter information.

- ✓ 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 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](mailto:benchmarkinghelp@phila.gov) for assistance.

The screenshot shows the 'Data Quality Checker' results page. It includes a 'Select Timeframe & Run Checker' section with a 'Year Ending' dropdown set to 'Dec 31' and a 'Re-Run Checker' button. The 'About Timeframes' section explains that the checker needs one full calendar year of Property Use Details and meter information. The 'About Alerts' section explains that the checker will show you basic alerts to let you know what's missing. A red circle highlights the error message: 'There is not 12 full months of meter data.'

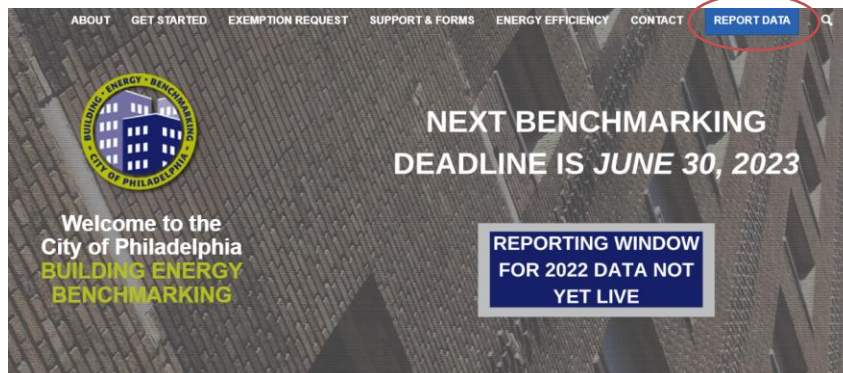
You may IGNORE the waste meter alert. Waste is not required.

- ✓ If you do not have any data errors, you are now ready to submit your data through Philadelphia's Benchmarking Website by following the steps below.



## Step 5 Submit Your Data to the City of Philadelphia

- ✓ Go to [www.phillybuildingbenchmarking.com](http://www.phillybuildingbenchmarking.com) and click on **REPORT DATA** located at the menu bar.



- ✓ 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**.

**Your Response**

Select information to include:

Timeframe: \* Single Year Sep 30 2014

If the data requestor has specified a timeframe for the request, you will not be able to change it.

Properties: \* One Property Test Building

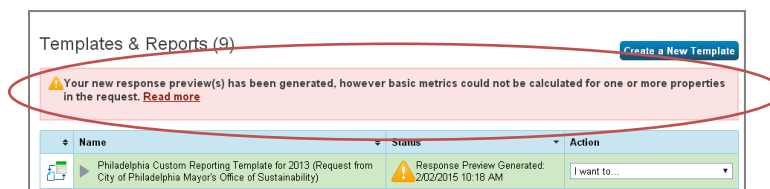
The data requestor may have asked for one or more standard IDs to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response.

**Generate Response Preview** Cancel

**Preview**

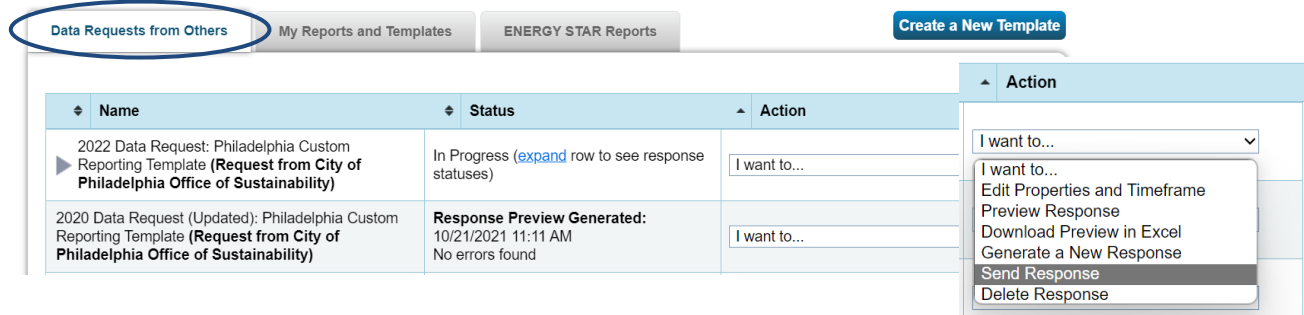
Making selections specific properties your response. You response before Portfolio Manager the preview in ord Large responses prepare. Your res available from the Reports" section when it is ready.

Data Quality Note: If the data or account has any issues an alert message will pop-up after this step. Please click "read more" to fix the issue and repeat reporting instructions to submit or contact [benchmarkinghelp@phila.gov](mailto:benchmarkinghelp@phila.gov) if you are not able to resolve the issue.

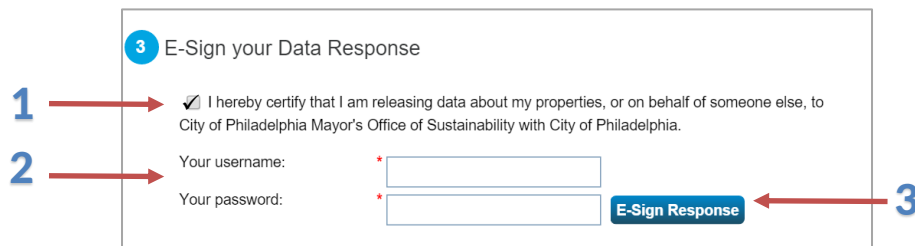




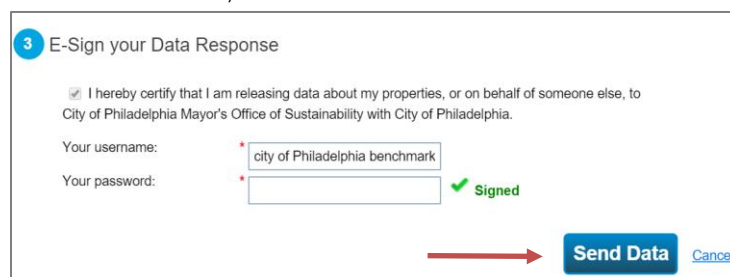
- ✓ If there are no error messages scroll down to Data Requests from Others and find the item titled **“Philadelphia Custom Reporting Template for 2022”** and select **Send Response** from the Action drop-down list next to the report name.



- ✓ One next screen, scroll down to #3 E-Sign Your Data Response, **1 check the box**, enter your **2 login information** and then click **3 E-Sign Response**.



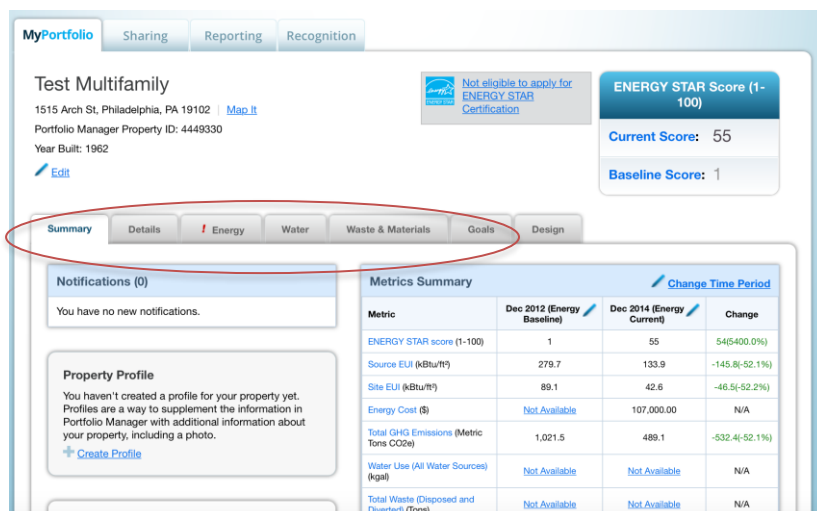
- ✓ The screen will refresh then scroll down to the bottom (you will see a green text that says “Signed”) and then click **Send Data** to the City. You will receive an email confirmation from Portfolio Manager.





## Step 6 Review the Results

- ✓ The goal of the City's benchmarking law is to help building owners and operators track their utility usage over time. You can monitor changes in your facility's usage by tracking the EUI (which measures energy intensity by square footage) or, in certain buildings, ENERGY STAR score under the **Summary**, **Energy**, **Water** or **Goals** tabs.



- ✓ Contact the Office of Sustainability at [benchmarkinghelp@phila.gov](mailto:benchmarkinghelp@phila.gov) for help to understand your results.

## Interested in improving your building's performance?

Visit <http://www.phillybuildingbenchmarking.com/incentives/> for free and low-cost programs that can help you improve energy performance and save you money.

