EVERSOURCE ENERGY

Eversource Integration With Energy Star Portfolio Manager

Configuring Automatic Data Transfer for Your Energy Benchmarking Needs

Updated March 29, 2017

107 Selden Street
Berlin, CT 06037

The goal of this manual is to assist you, the customer, in setting up the automatic transfer of billing data from your Eversource electric and natural gas accounts into your account with the ENERGY STAR® Portfolio Manager® program. Eversource has developed a process to integrate your energy usage and cost data with the ENERGY STAR® Portfolio Manager® program in order to better assist in tracking energy and cost reductions.

This process has been developed in compliance with State of Connecticut General Statutes 16a-37t (Benchmarking energy and water consumption in state buildings) and 16-245ii (Energy consumption data of Nonresidential buildings). The statutes describe an interface to make energy consumption data available for State of Connecticut buildings via direct Electronic Data Interchange (EDI). Environmental Protection Agency (EPA) has requested direct electronic transfer of data to the U.S. Department of ENERGY STAR Portfolio Manager (ESPM) benchmarking application.
Through the EPA PM interface, the building owners (customers) can sign up and create Property & Meter details and establish the building's profile. Then, customer will choose the share portfolio option to initiate the process of automated data transfer from the energy service organization. In this case the Energy Consumption information will be exchanged from Eversource Energy to ENERGY STAR Portfolio Manager (ESPM).

To begin:

- If you are starting without a Portfolio Manager® account, proceed to **Part 1** (page 2)
- If you have a current account set up, but no meters entered, proceed to **Part 2** (page 8)
- If you already have a fully operational account, and just need to connect to Eversource, proceed to **Part 3** (page 15)

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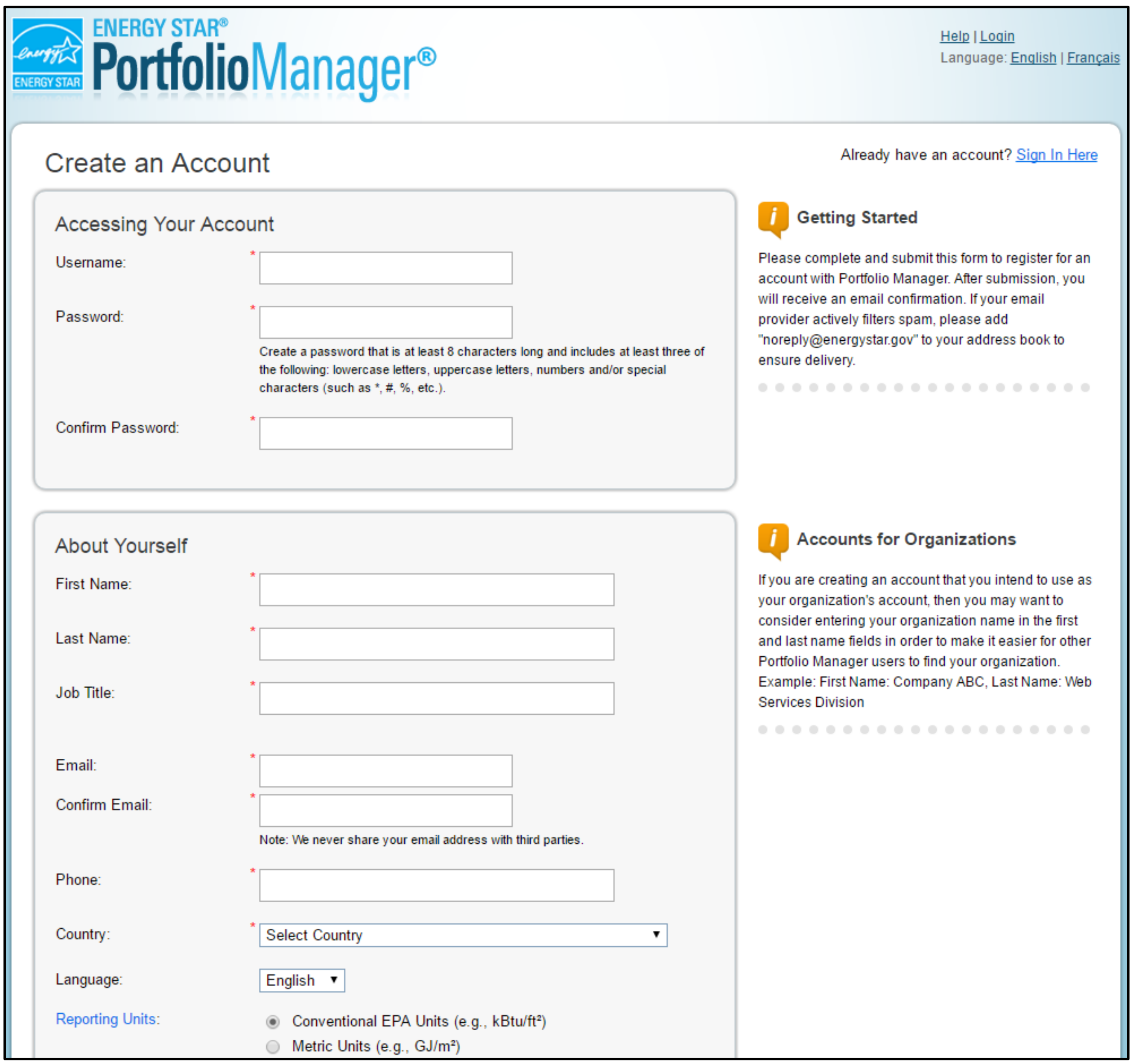
Part 1 – Account Creation & Initial Setup

1. Create an account by registering on the ENERGY STAR® Portfolio Manager® website: https://portfoliomanager.energystar.gov/pm/signup



ENERGY STAR® Portfolio Manager®

Help | Login
Language: English | Français

Create an Account

Already have an account? Sign In Here

Accessing Your Account

Username: *

Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

Confirm Password: *

Getting Started

Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: * Select Country

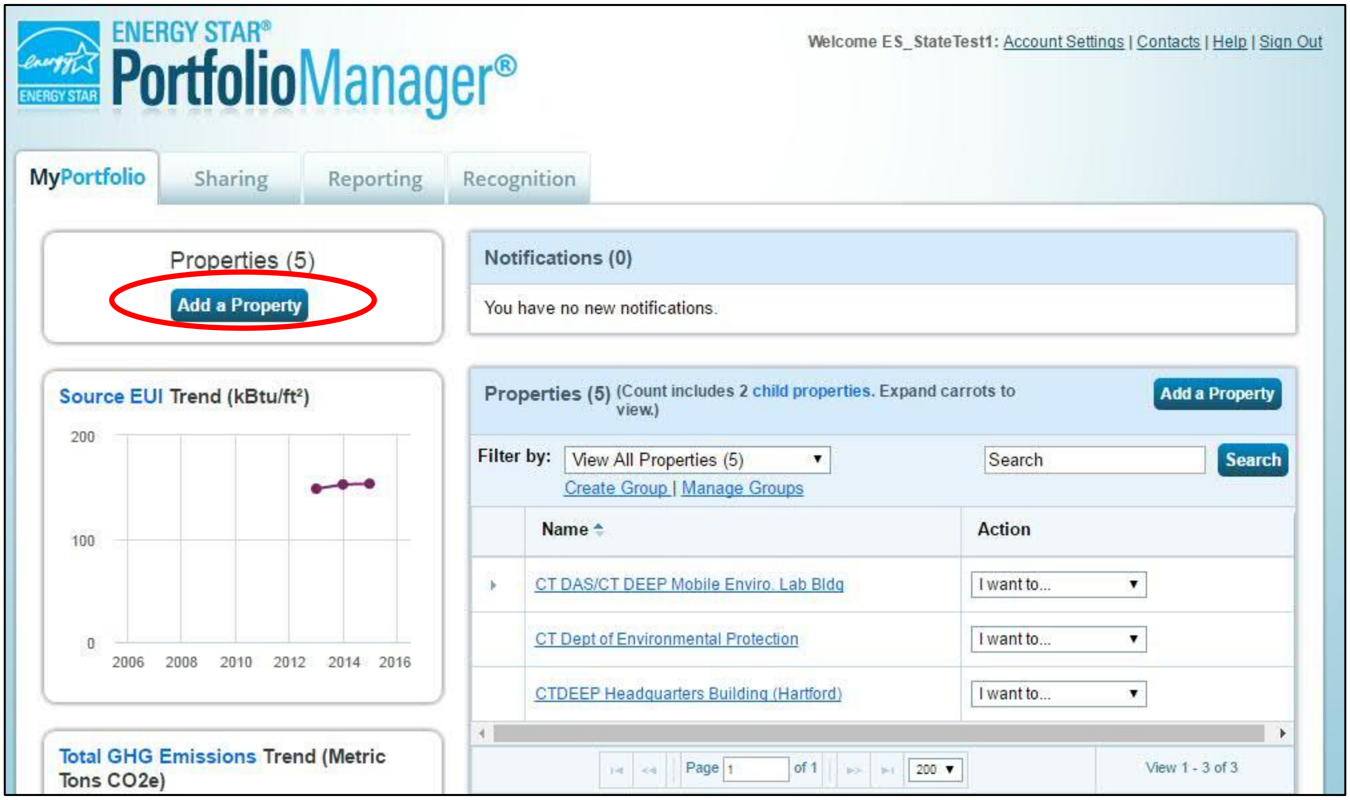
Language: English

Reporting Units: Conventional EPA Units (e.g., kBtu/ft²) / Metric Units (e.g., GJ/m²)

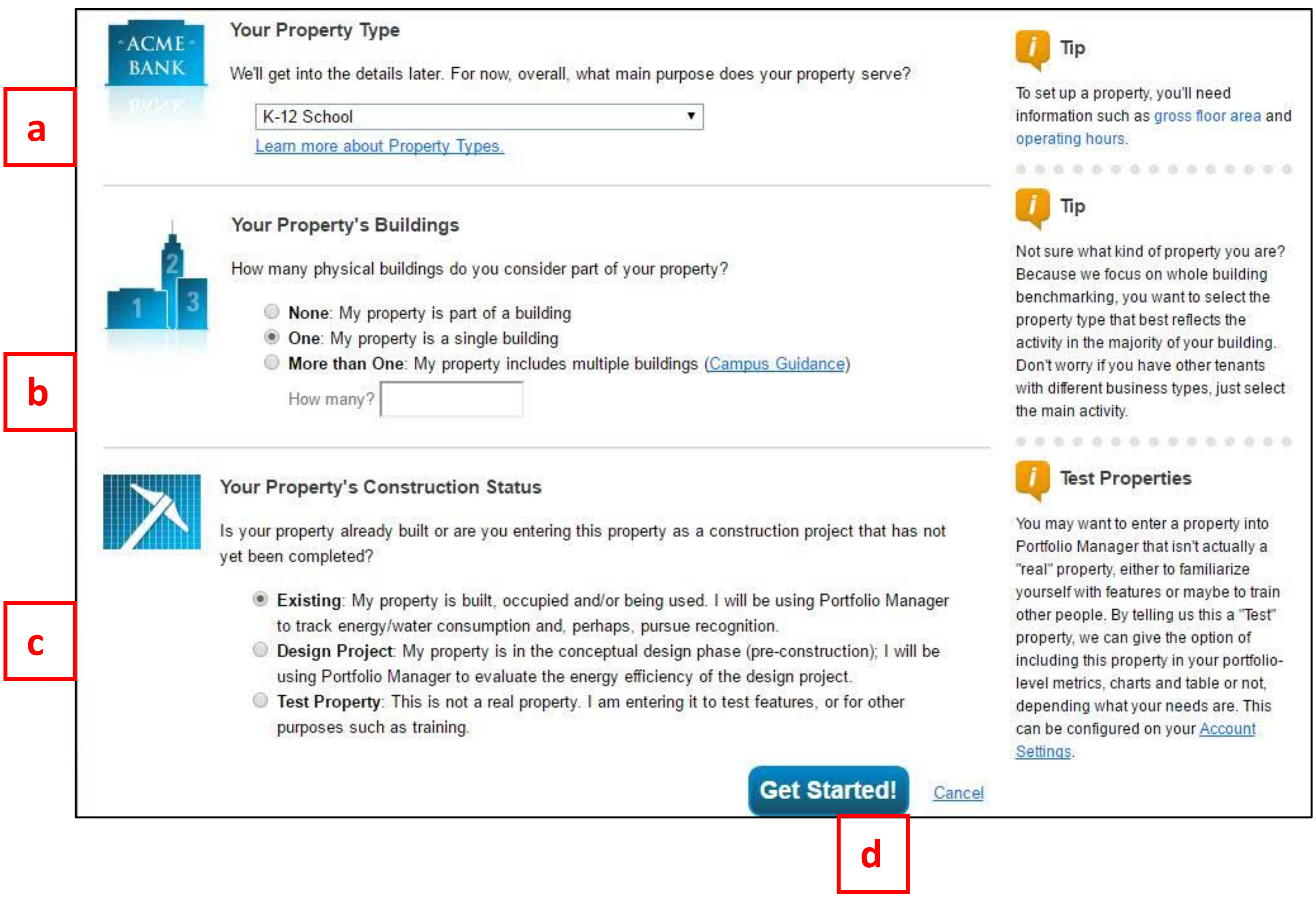
Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

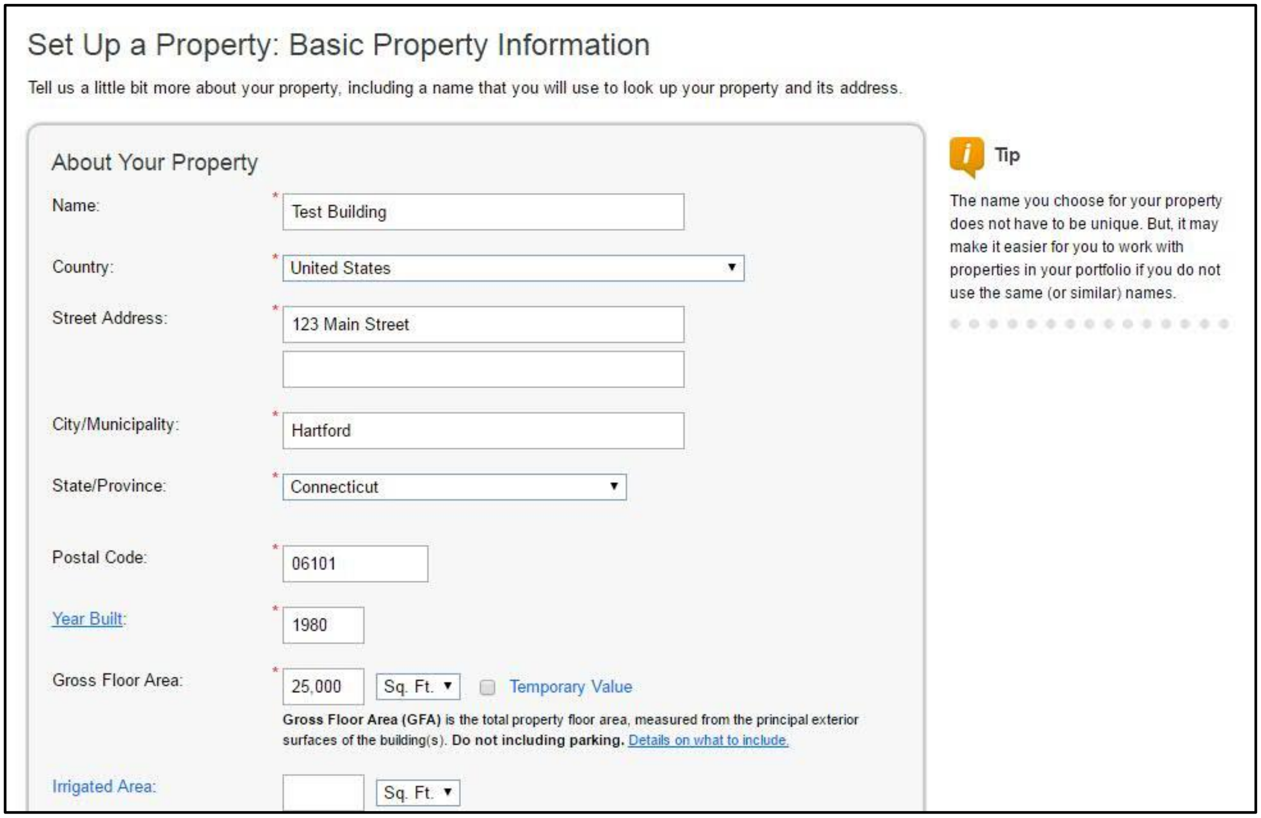
2. After signing into your newly created account, click on the "Add a Property" button.



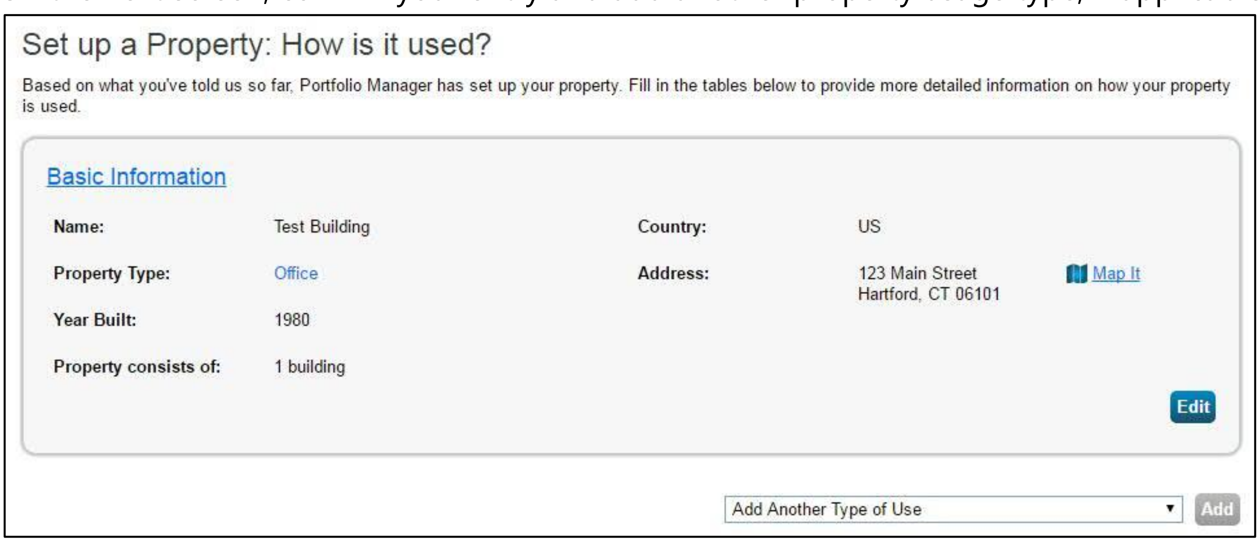
3. Follow the instructions on screen to set up your property.
    a. Choose your property type (Office, K-12 School, Police Station, etc.)
    b. Select whether your property is part of a building (such as a single floor), a single building, or a campus consisting of multiple buildings
    c. Select whether your property is already existing, in the design phase, or simply a test property
    d. Click “Get Started!”



4. On the “Basic Property Information” screen, fill out the required fields with information relevant to the property you will be benchmarking.

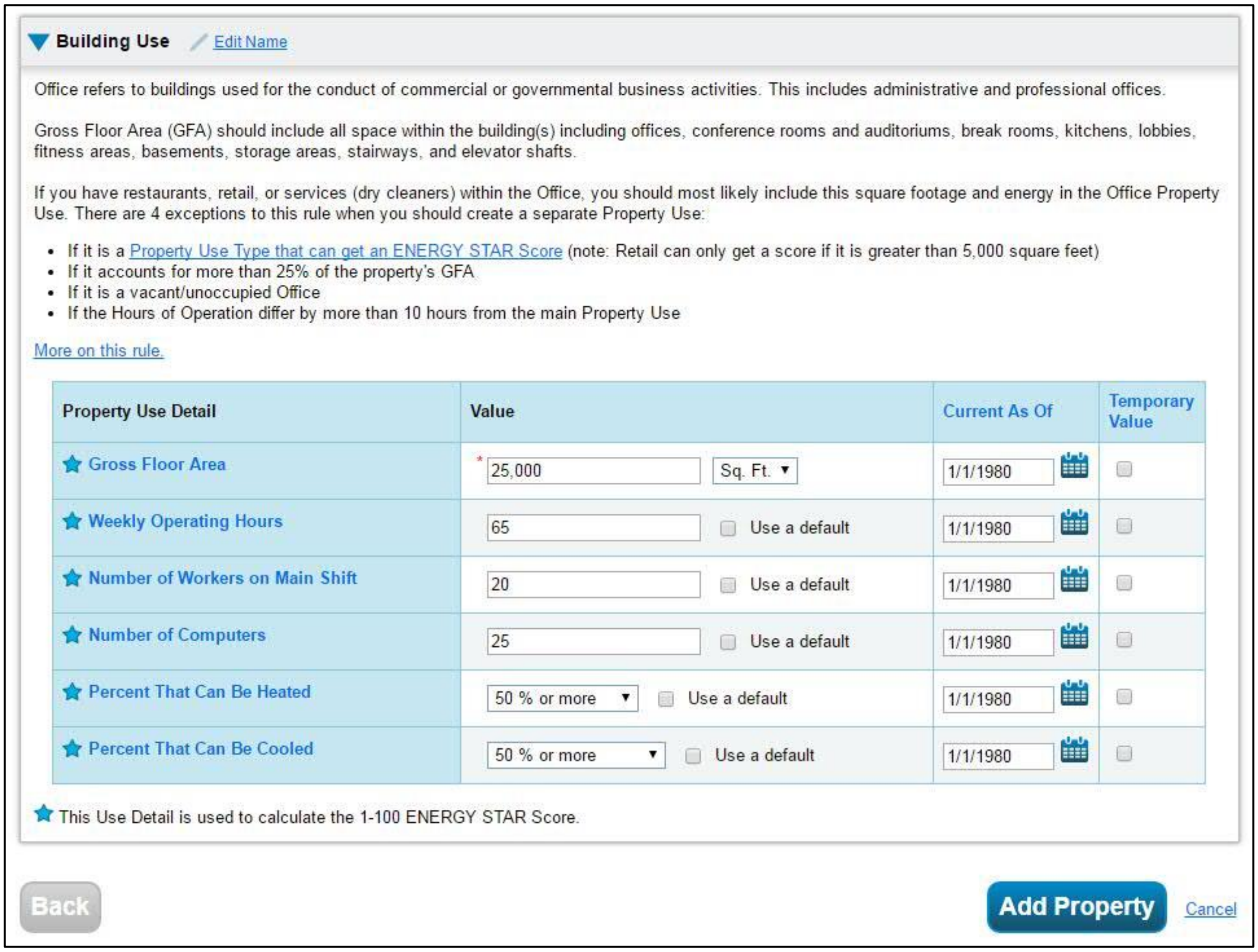


On the next screen, confirm your entry and add another property usage type, if applicable.



5. Next add operation details specific to your property usage type, or select "use a default" if you want to use an estimation. Click "Add Property" once you are finished.

Note: If you plan to apply for Energy Star certification for your building, you must use an accurate value, not an estimation.



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

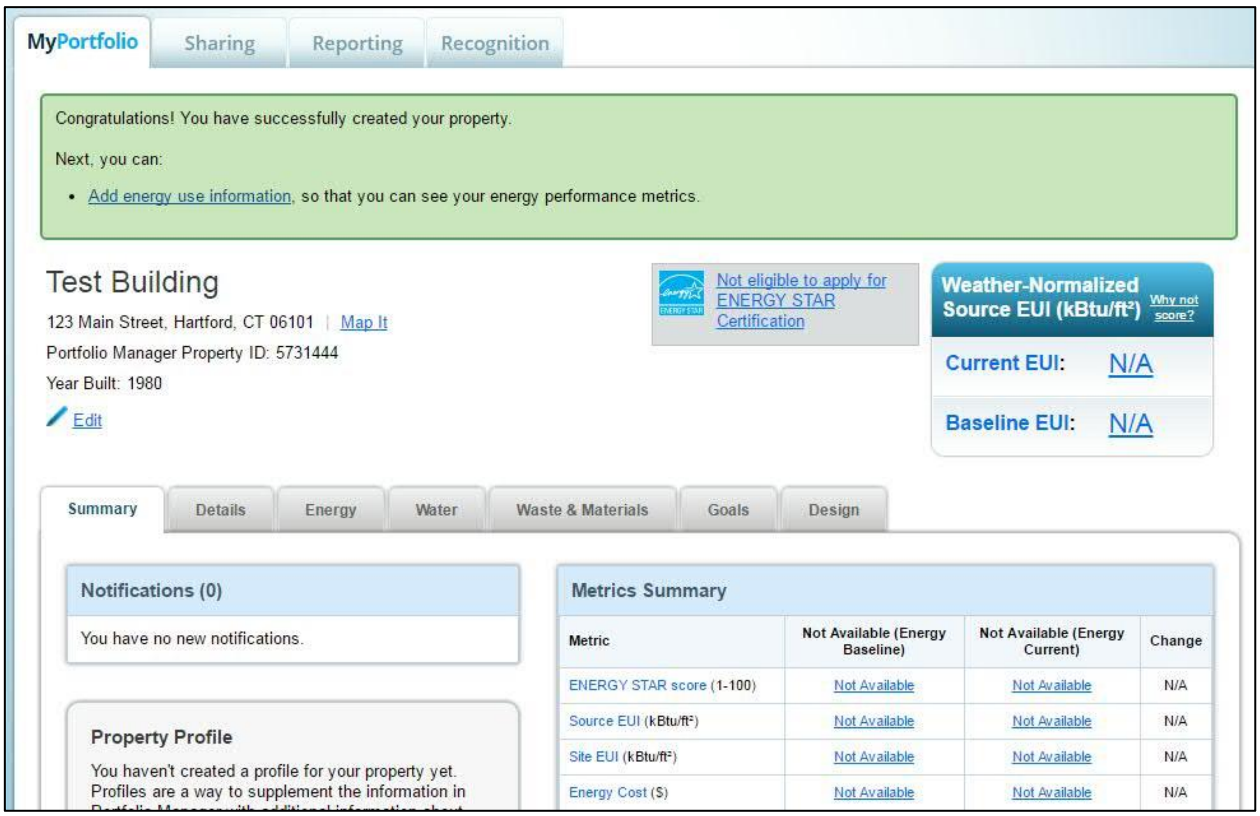
More on this rule.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 25,000 Sq. Ft.	1/1/1980	
★ Weekly Operating Hours	65 Use a default	1/1/1980	
★ Number of Workers on Main Shift	20 Use a default	1/1/1980	
★ Number of Computers	25 Use a default	1/1/1980	
★ Percent That Can Be Heated	50 % or more Use a default	1/1/1980	
★ Percent That Can Be Cooled	50 % or more Use a default	1/1/1980	

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

Back Add Property Cancel

6. After you finish adding the property, you will return to the My Portfolio view and see a confirmation dialogue.
   Congratulations! You have added your first property!



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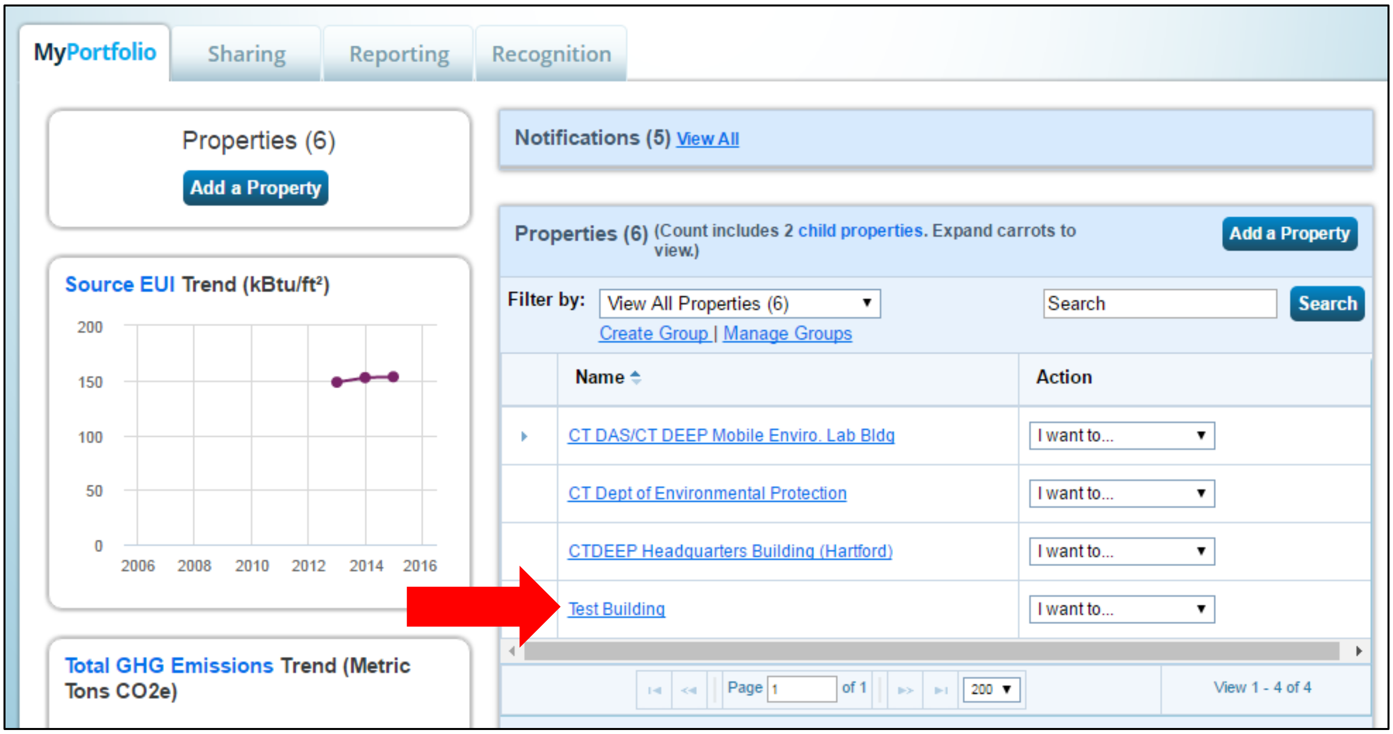
Part 2 – Entering Meter Information

1. From your Portfolio overview page, select the building for which you are entering meter information



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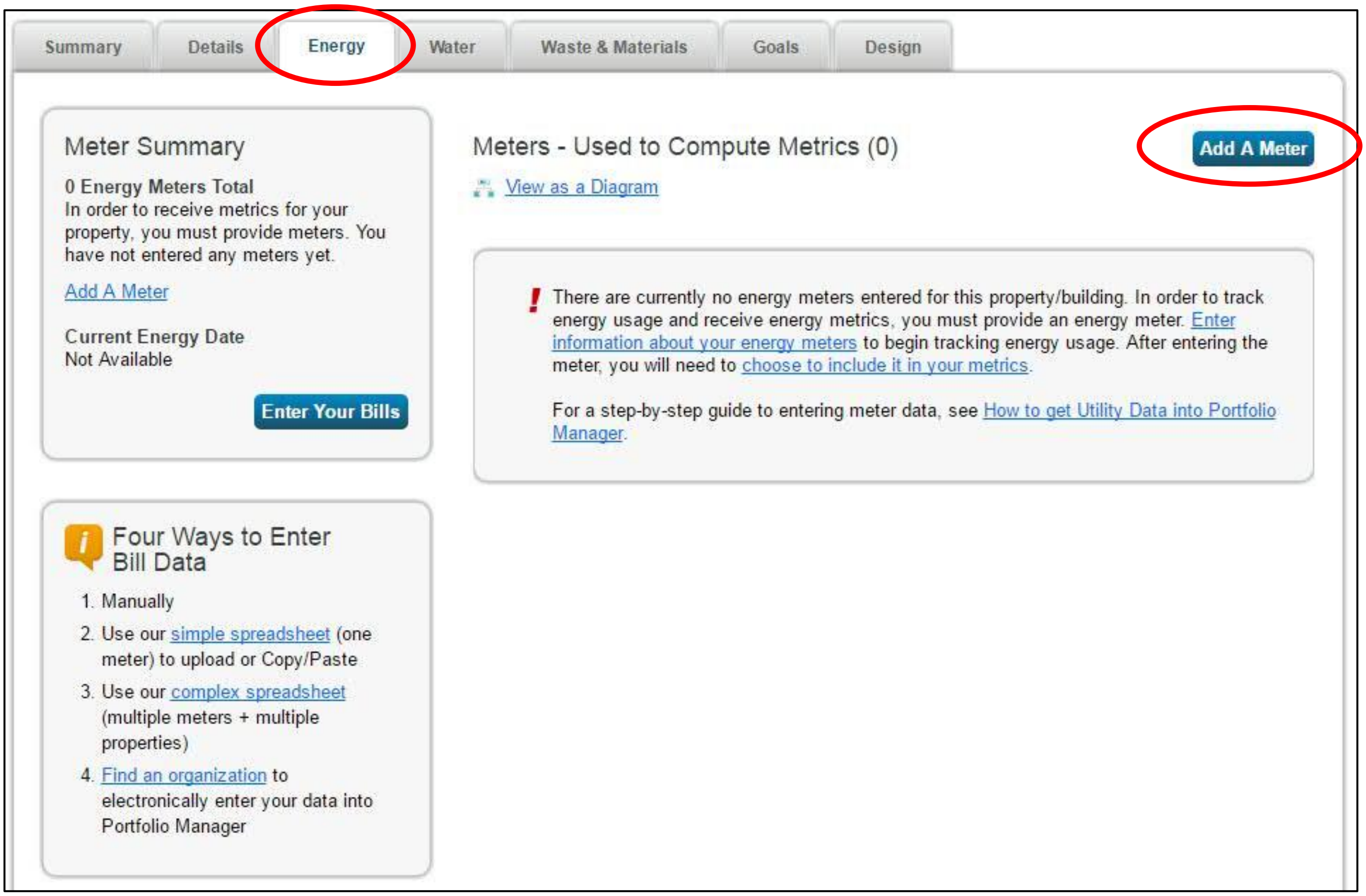
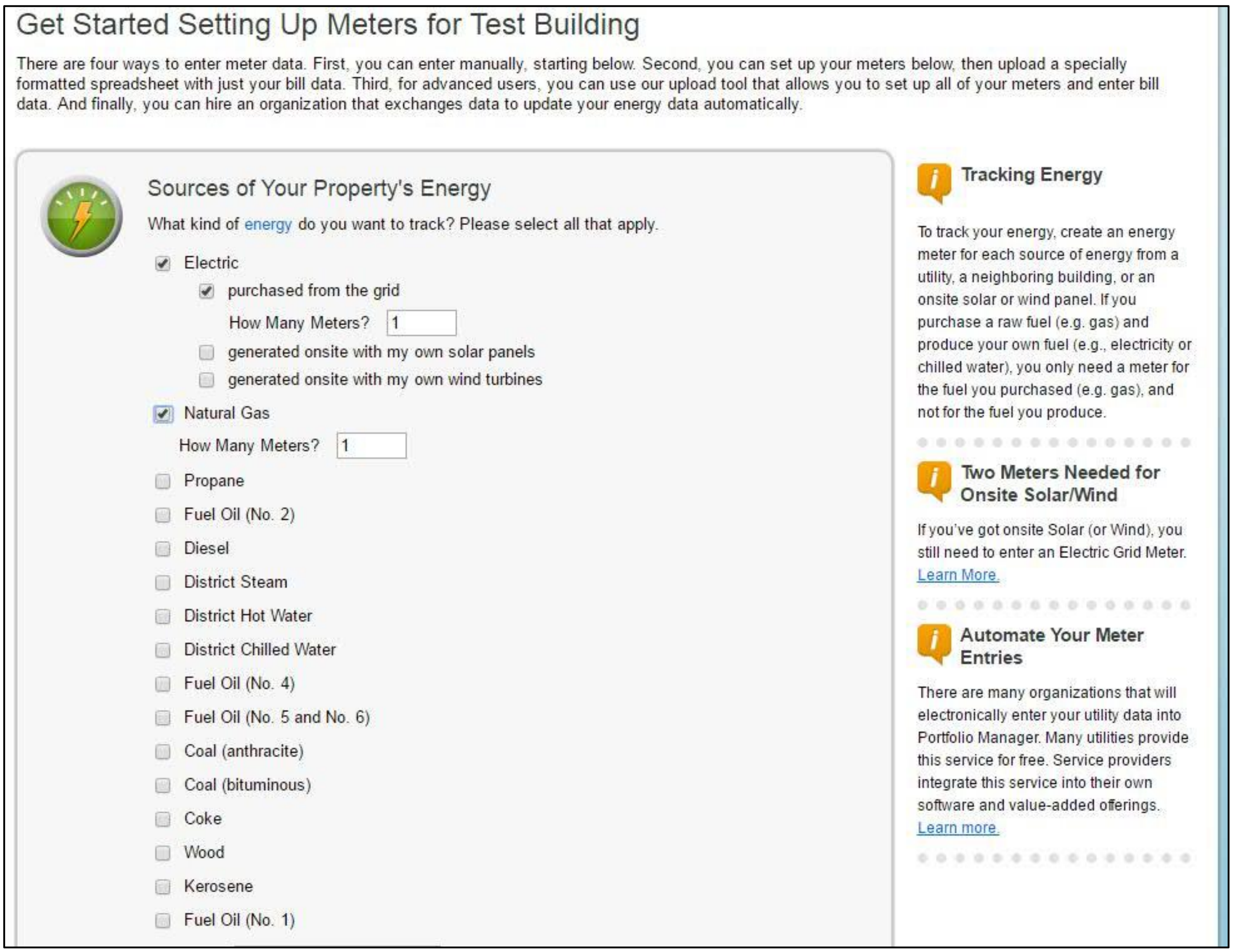
2. Click on the “Energy” tab on your property overview. Once on the “Energy” tab, click on “Add A Meter”



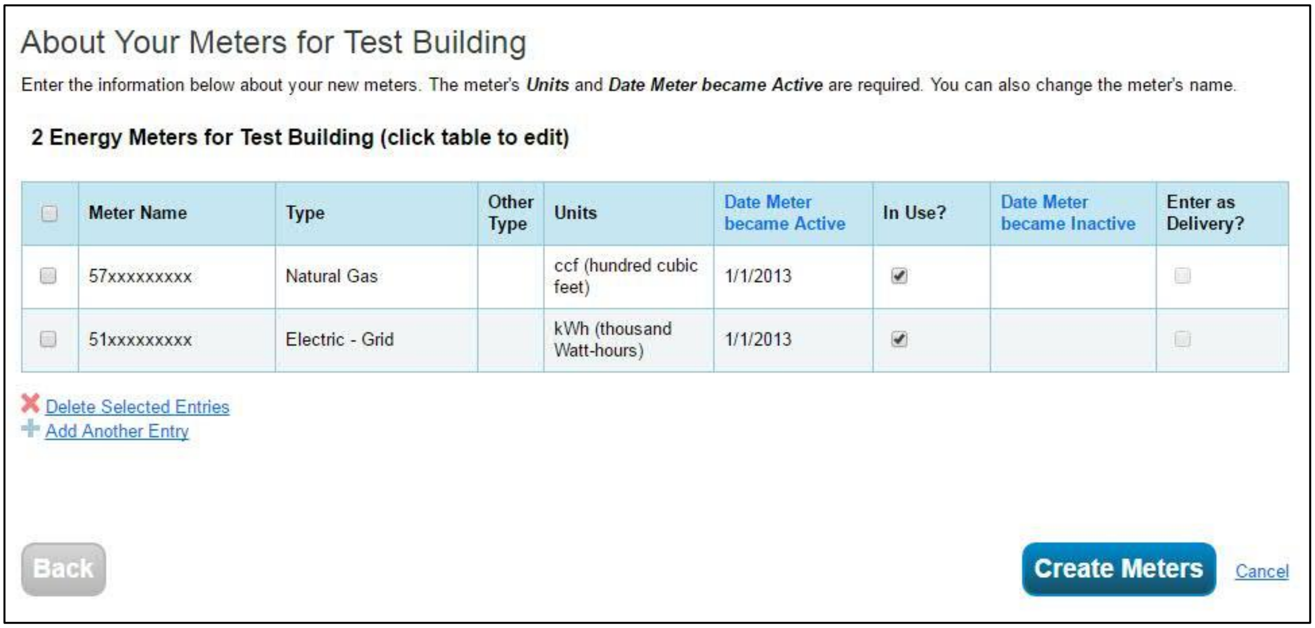
3. Select the types of meters your property has, including those not provided by Eversource.

   If applicable, check any additional options for details about your meter.

   Click "Continue" once completed.



4. Complete meter information for your entry types, and click "Create Meters" when finished.



Required fields for data transfer:

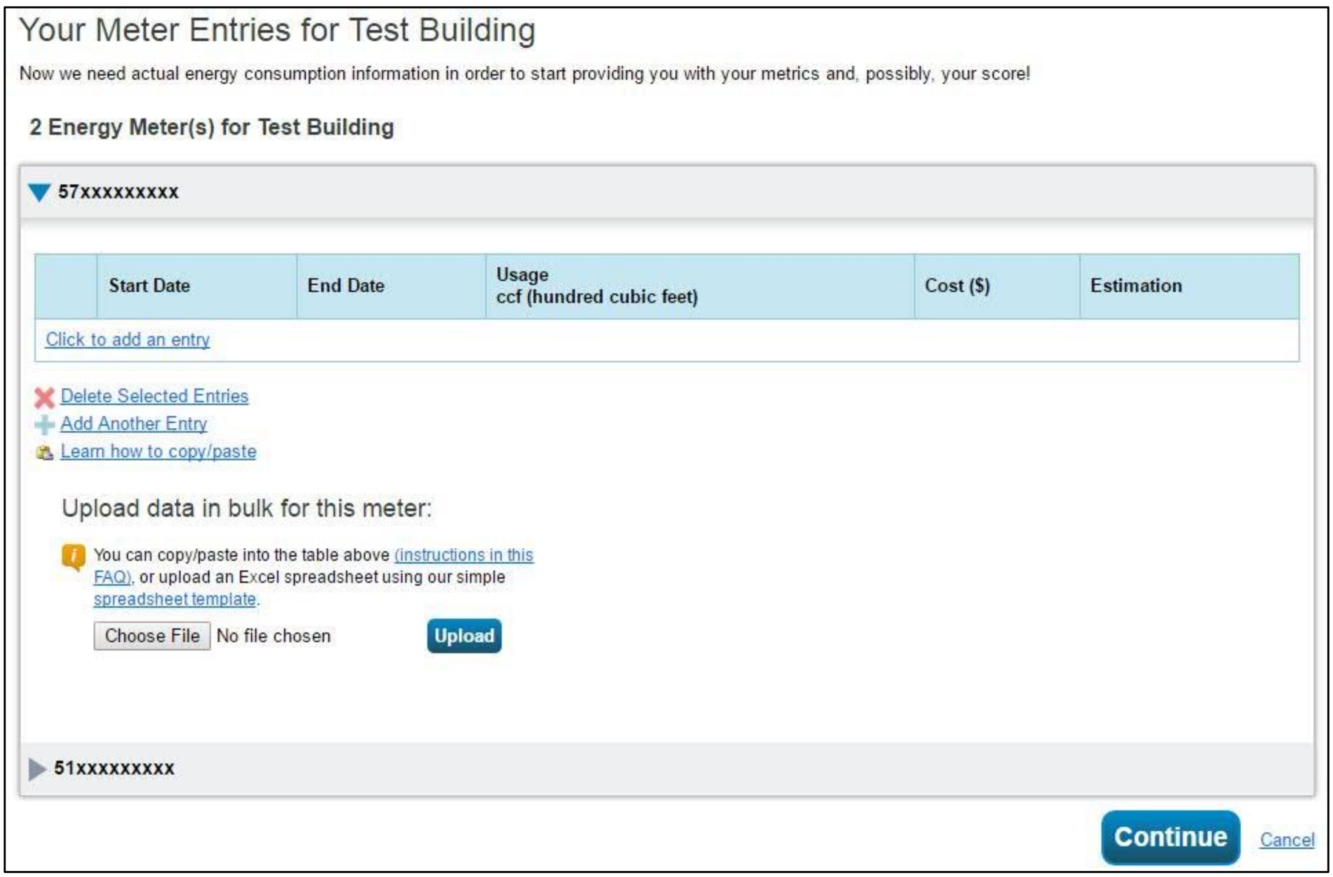
<u>Meter Name</u> – Be sure to enter your full 11-digit electric or natural gas account number

<u>Units</u> – Select the correct units from the drop down menu. Eversource bills in kWh (thousand Watt-hours) for electric and ccf (hundred cubic feet) for natural gas.

<u>Date Meter became Active</u> – You may enter the actual date of meter activation, however Eversource will only transmit data from 1/1/2013 to current date.

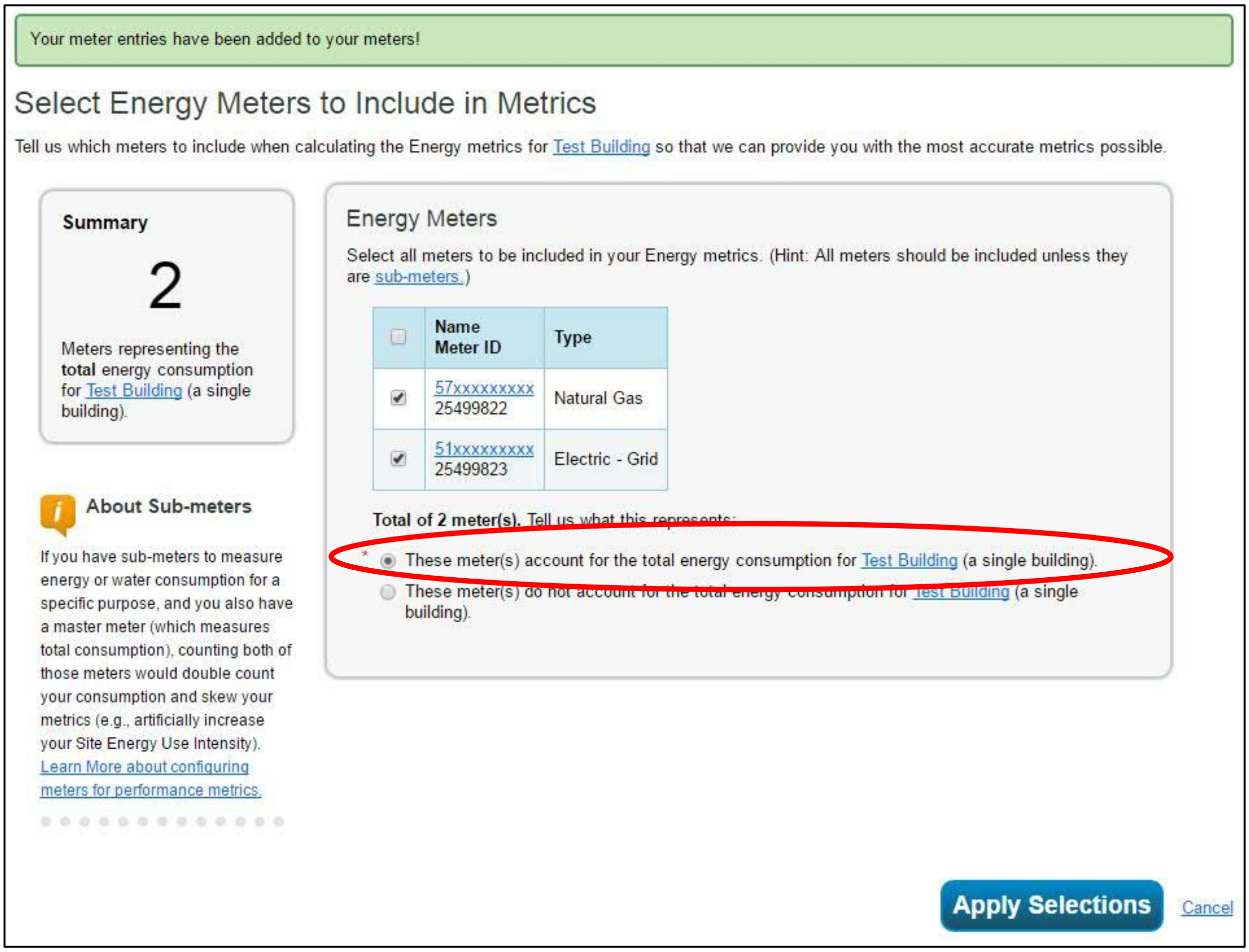
**You must still fill in these fields relevant to any non-Eversource meters, such as fuel oil or propane*

5. The following screen is for manually entering billing usage entries. This screen may be skipped if you are only interested in having Eversource accounts automatically filled in going back to 1/1/2013.
   However, if you would like to fill in billing information for electric/natural gas meters prior to 1/1/2013, or any billing usage for third-party fuel types, you may enter data here below, or return to it later. Click "Continue" to move to the next page.

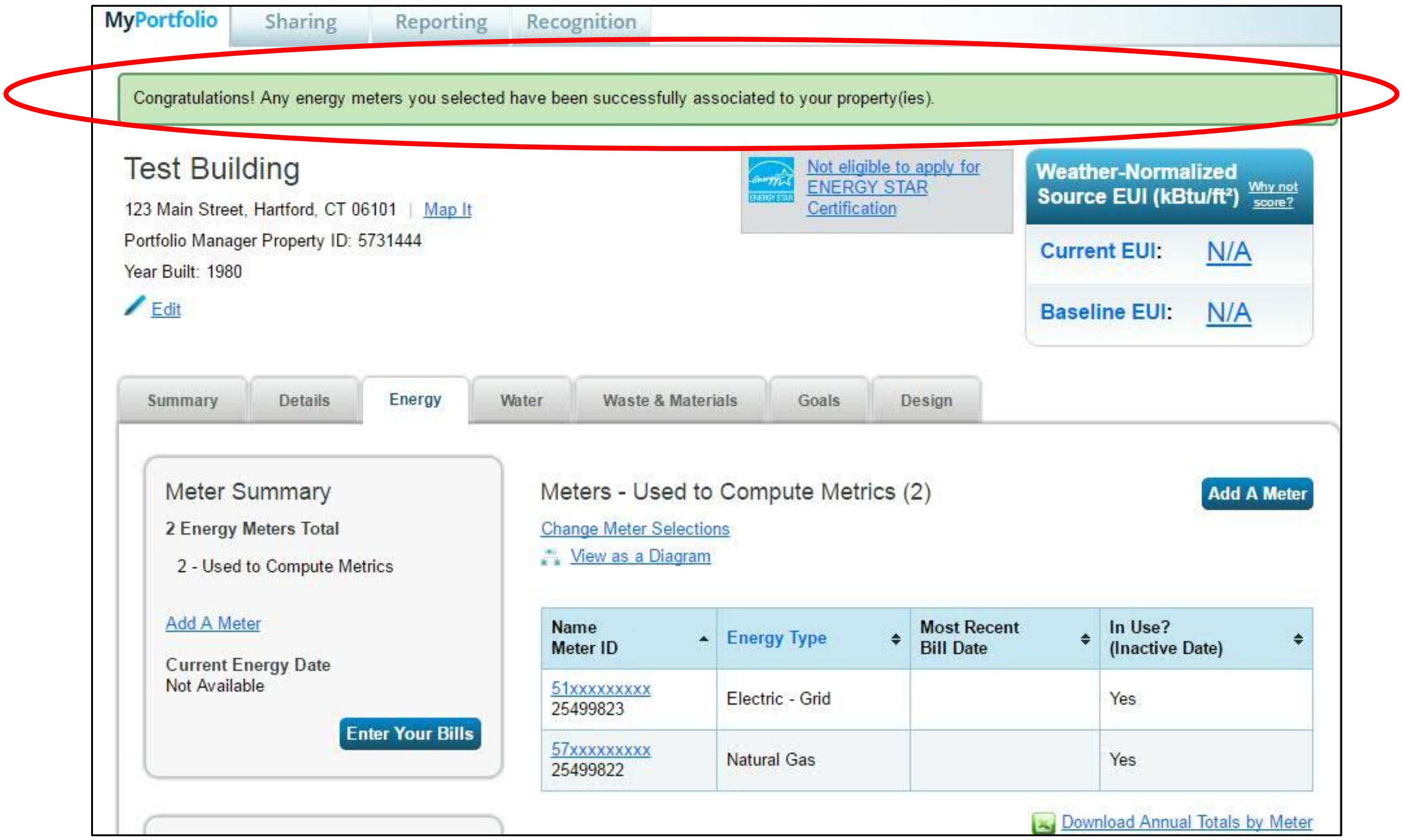


**If you plan to apply for Energy Star certification, all third-party fuel types must be entered accurately.*

6. On this screen, verify that the meters selected represent the total energy usage for your property, then select the bubble confirming so. Click "Apply Selections" when finished.



7. You will see the following confirmation notice stating the meters have been added properly to your account.



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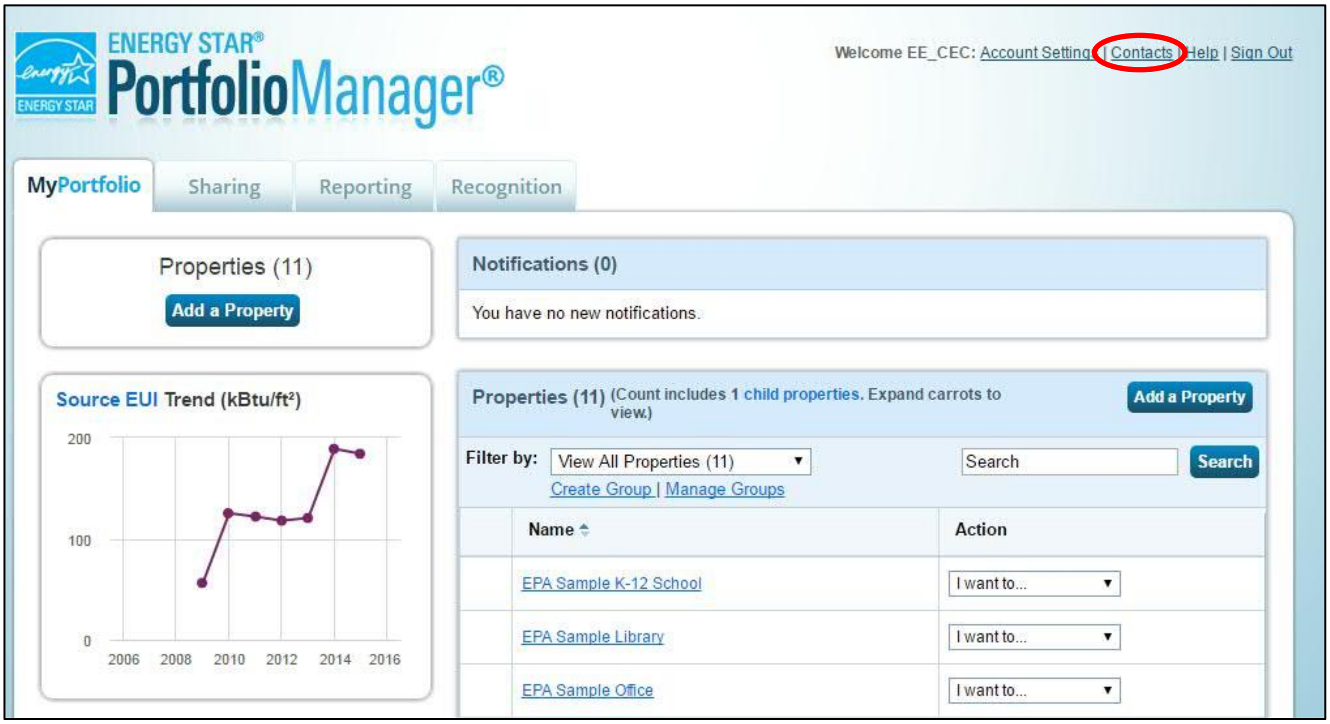
Part 3 – Creating a Share Request for Automatic Bill Transfer

1. From the Portfolio Manager home screen, click on the “Contacts” link at the top of the screen.



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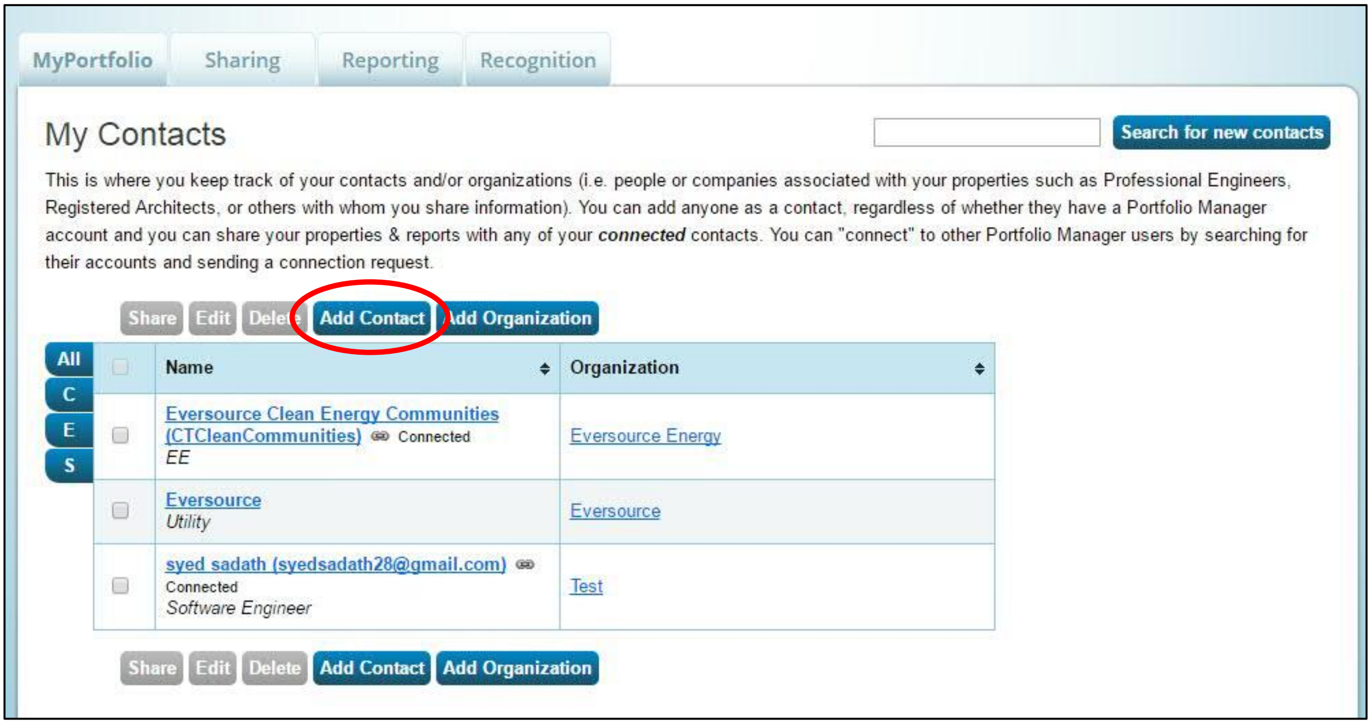
2. From the “My Contacts” screen, click on either of the “Add Contact” buttons.



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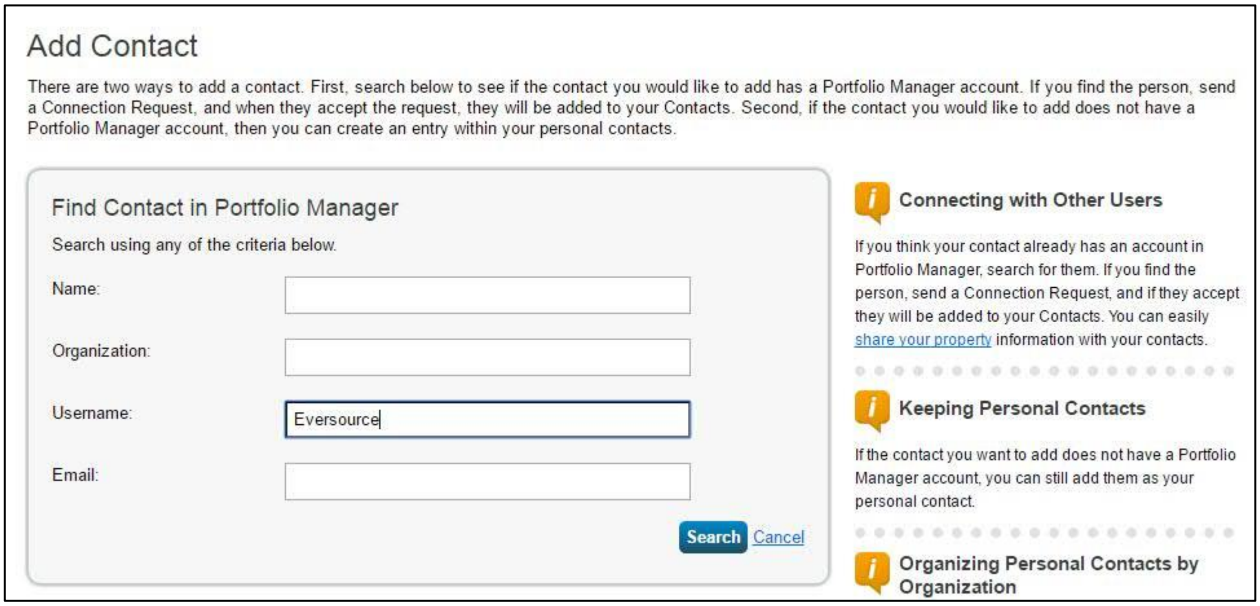
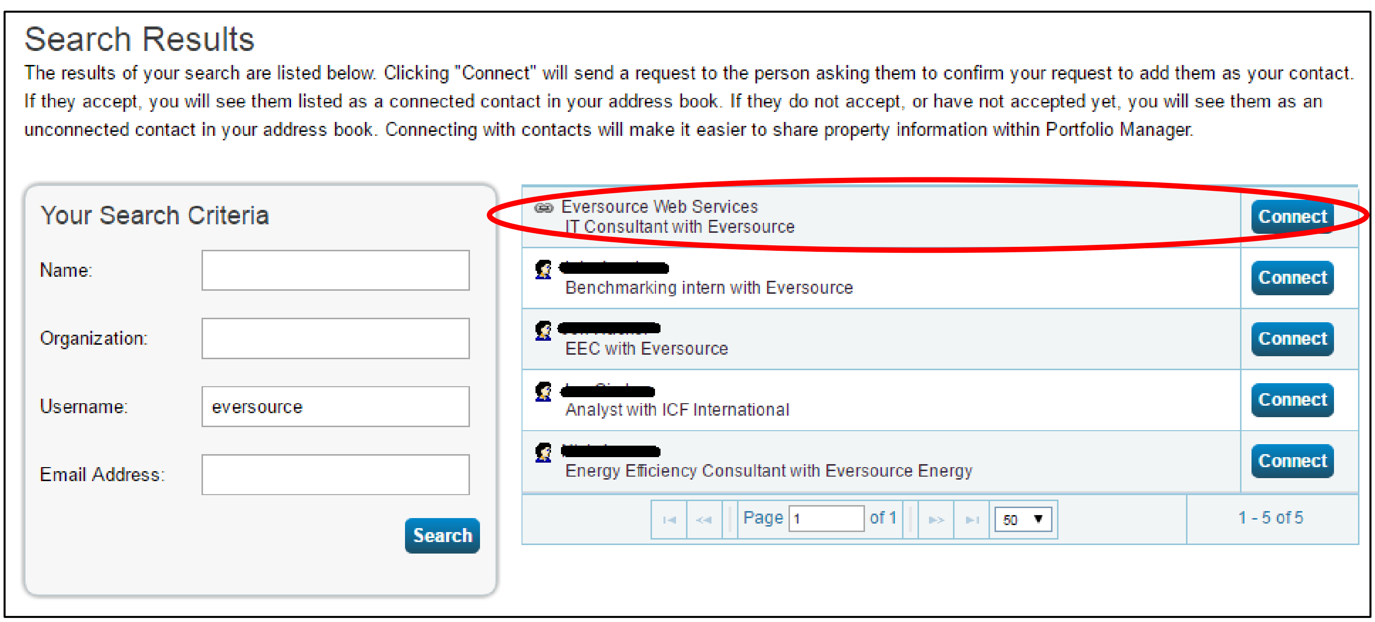
3. On the “Add Contact” screen, type “Eversource” into the username search field, then click “Search”



Click “Connect” only on the account “Eversource Web Services”



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4. Next you will have to authenticate ownership of your account by filling in the appropriate fields with information from your most recent bill from any building. Be careful to enter the data in the format shown to avoid errors.

Send a Connection Request to Eversource Web Services to Begin Exchanging Data

Eversource Web Services requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact Eversource Web Services. Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Relationship : *	1 Enter 1 if you are owner, 2 if you are agent of an owner; 1 - 1 Characters	Example: 1
Your Name : *	John Matthew Length; 1 - 50 Characters	Example: John Mathew
Billing account # : *	51123123456 Length; 8 - 11 Characters	Example: 51123123456
Bill Start Date : *	20160121 Enter the date Format as YYYYMMDD; 8 - 8 Characters	Example: 20160121
Bill End Date : *	20160121 Enter the date Format as YYYYMMDD; 8 - 8 Characters	Example: 20160121
Individual Month Energy Usage Amount on Bill (kWh or CCF) : *	7332 Length; 1 - 15 Characters	Example: 73.32
Email : *	John@abc.com Length; 1 - 50 Characters	Example: John@abc.com
Phone # : *	781-321-0000 Length; 1 - 20 Characters	Example: 781-321-0000

Then read the Terms of Use and check the box to verify you agree to them before proceeding.

Terms of Use:

By submitting this request I understand that Eversource will provide my Portfolio Manager account with energy usage and billing data. Once approved, Eversource will have access to facility data from your listed properties. Eversource may use this data to recommend energy saving services. Eversource will not share your information or data with non-Eversource entities. Check the below box to agree to the aforementioned terms of use

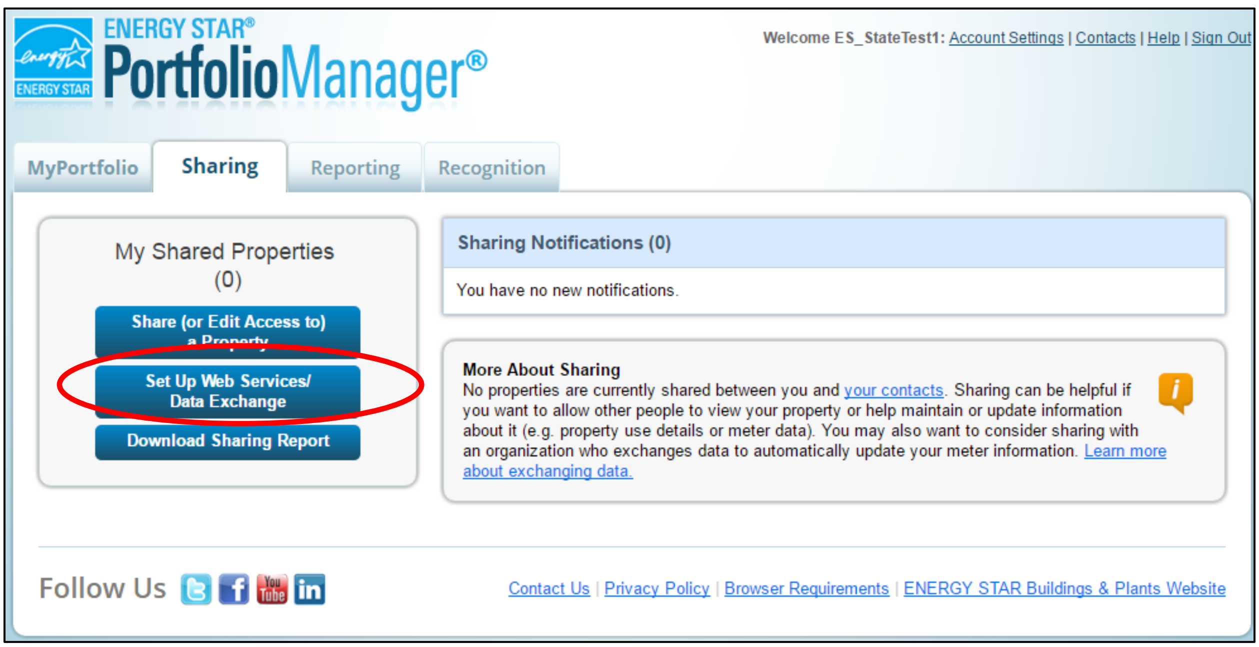
Agreement: * ☑ I agree to my provider's (Eversource Web Services) Terms of Use.

Send Connection Request Cancel

A confirmation of successful verification will be processed overnight and appear on the next business day.

5. Sharing your properties
****This step can only be performed after a successful verification of the previous step***

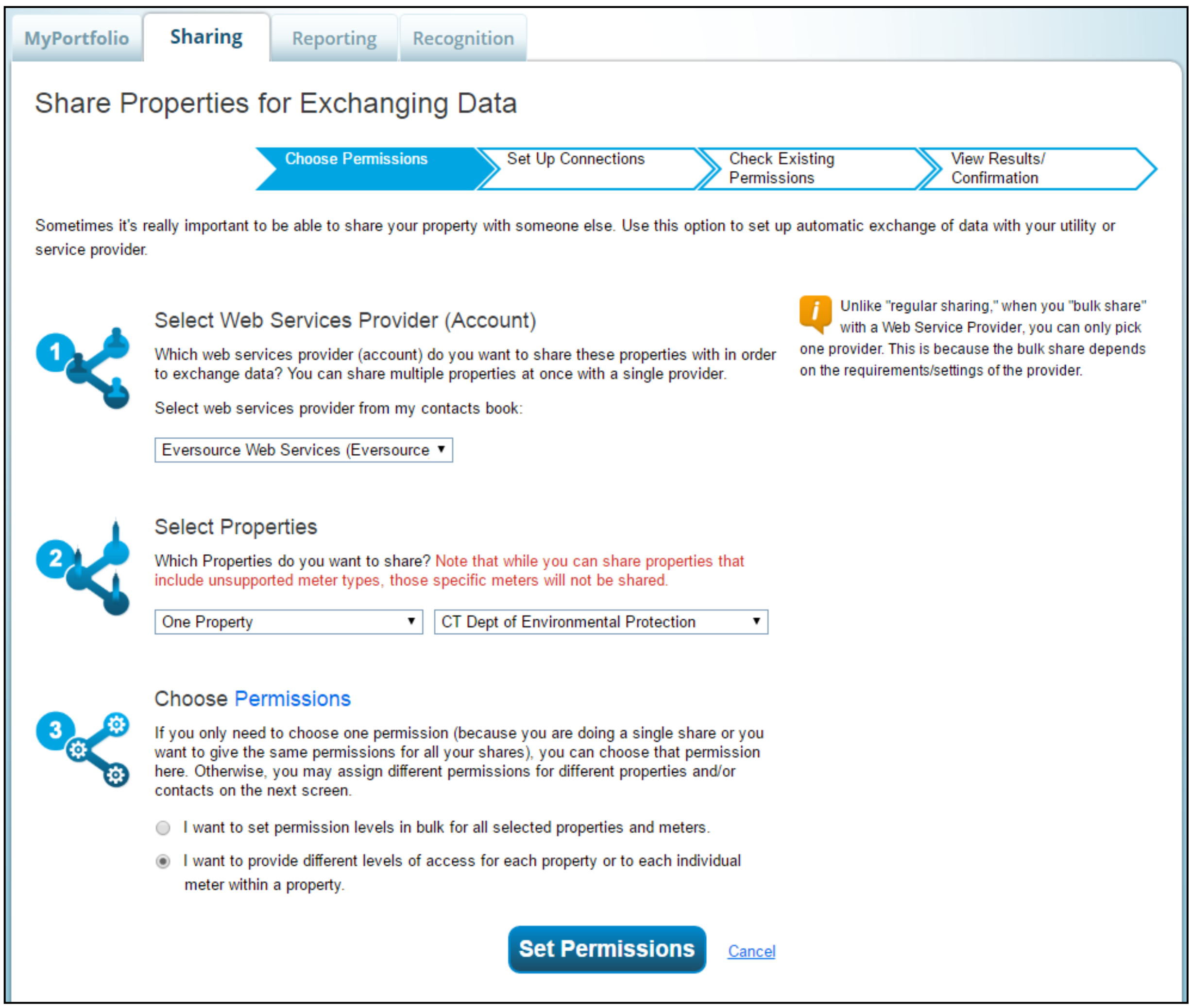
Click on the “Sharing” tab, then click on the button labeled “Set Up Web Services/Data Exchange”



6. In Step 1, select the "Eversource Web Services" account

   In Step 2, select number of properties you want to set up the data exchange for (in this example, one)

   In Step 3, select "I want to provide different levels of access for each property to each individual meter on a property" before clicking "continue"



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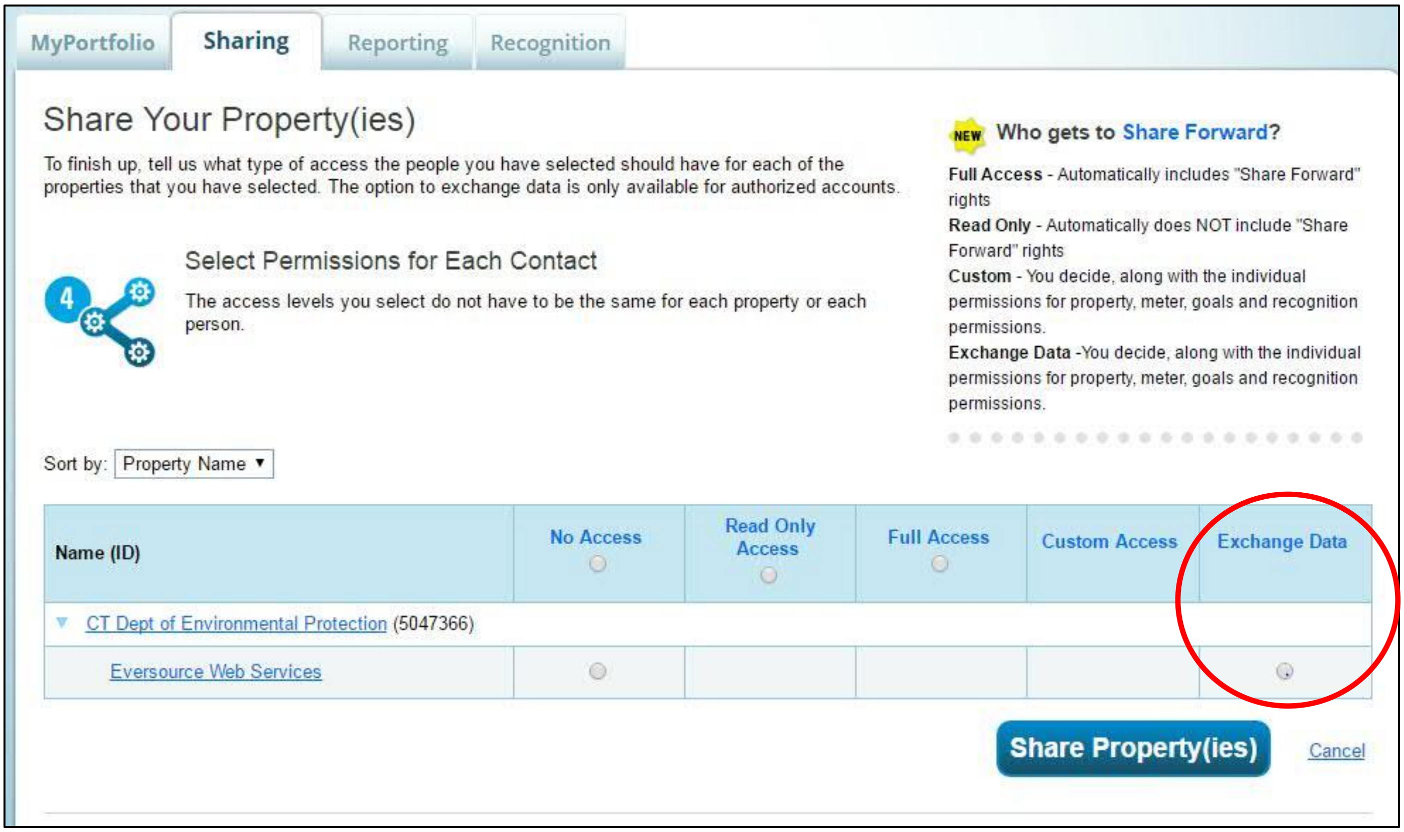
7. Select the “Exchange Data” option for the property to begin setting up the account verification. Read the instructions on the Access Permissions screen which pops up next.



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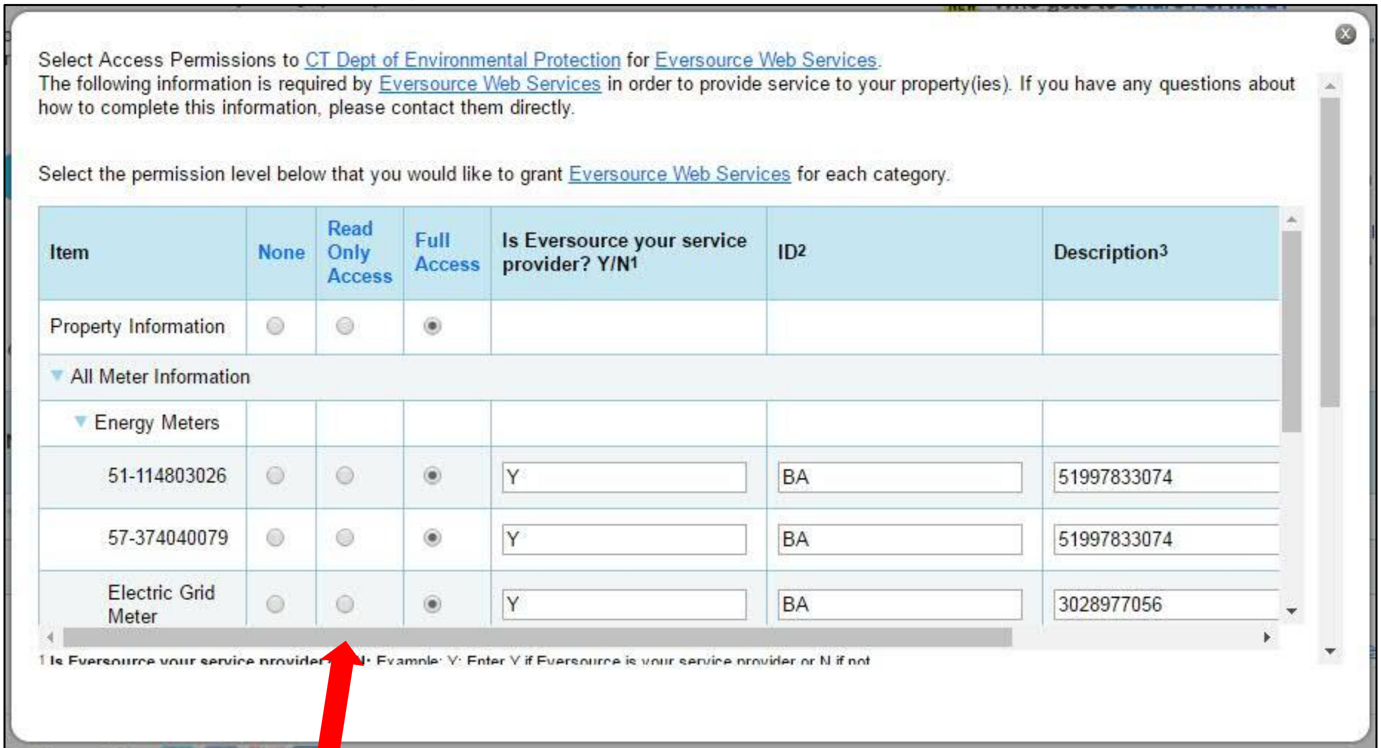
8. On the Access Permissions screen, you will have to enter information valid to each meter to authorize Eversource's ability to read and exchange data. Meters which are not provided by Eversource will still have to be authorized on this screen.

See the next page for explanations of what to enter for each field.


Select Access Permissions to CT Dept of Environmental Protection for Eversource Web Services.
The following information is required by Eversource Web Services in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Select the permission level below that you would like to grant Eversource Web Services for each category.

Item	None	Read Only Access	Full Access	Is Eversource your service provider? Y/N[1]	ID[2]	Description[3]
Property Information	○	○	◉			
▼ All Meter Information						
▼ Energy Meters						
51-114803026	○	○	◉	Y	BA	51997833074
57-374040079	○	○	◉	Y	BA	51997833074
Electric Grid Meter	○	○	◉	Y	BA	3028977056

[1] Is Eversource your service provider ... N: Example: Y: Enter Y if Eversource is your service provider or N if not

*Note, you will have to use the horizontal scroll bar to see all entry fields

For each meter you have created on your property, you will have to provide Eversource account information to ensure you are actually the owner of this meter. You will have to authorize using the Billing Account number, Service Account number, or Meter Number.

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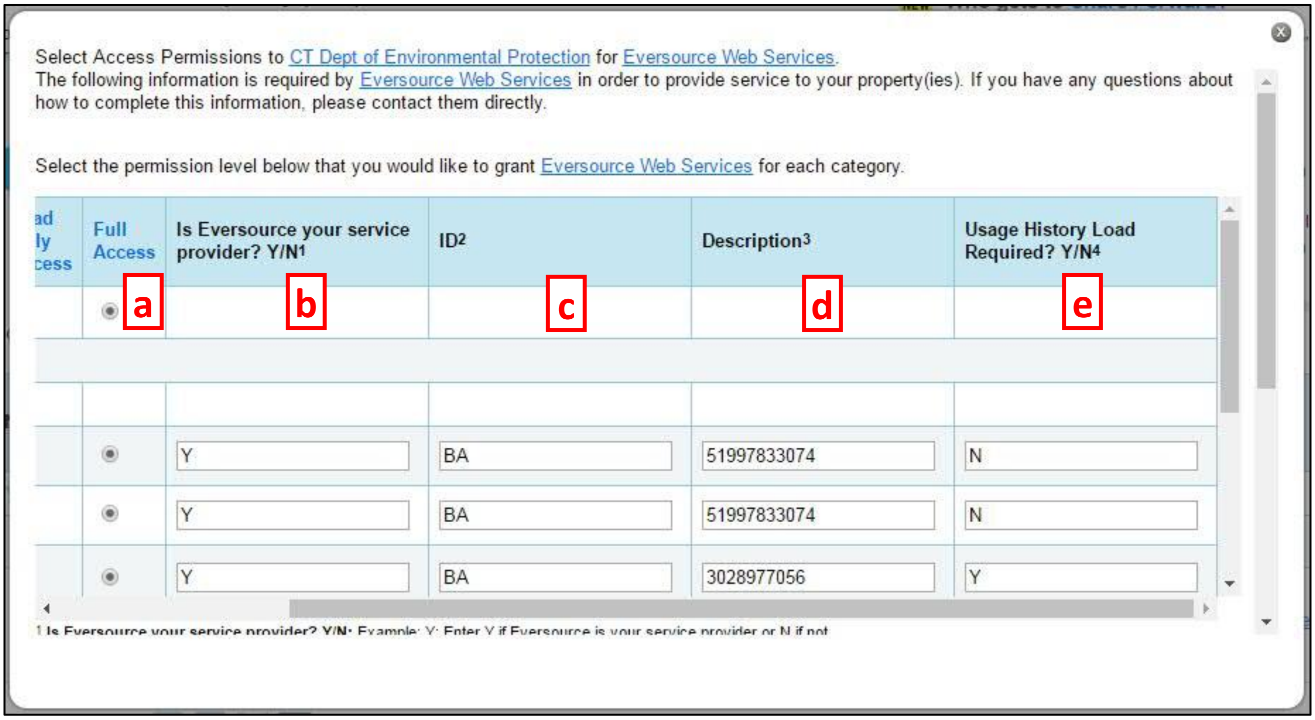


Select Access Permissions to CT Dept of Environmental Protection for Eversource Web Services.
The following information is required by Eversource Web Services in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Select the permission level below that you would like to grant Eversource Web Services for each category.

ad ly cess	Full Access	Is Eversource your service provider? Y/N[1]	ID[2]	Description[3]	Usage History Load Required? Y/N[4]
	a	b	c	d	e
		Y	BA	51997833074	N
		Y	BA	51997833074	N
		Y	BA	3028977056	Y

1 Is Eversource your service provider? Y/N: Example: Y; Enter Y if Eversource is your service provider or N if not

a) Select **Full Access** to allow for automatic transfer

b) **Is Eversource your service provider?** Y=Yes

c) **ID** can be Billing Account number (BA), Service Account Number (SA), or Meter Number (MN)

d) **Description** enter the chosen ID exactly as it appears on your bill

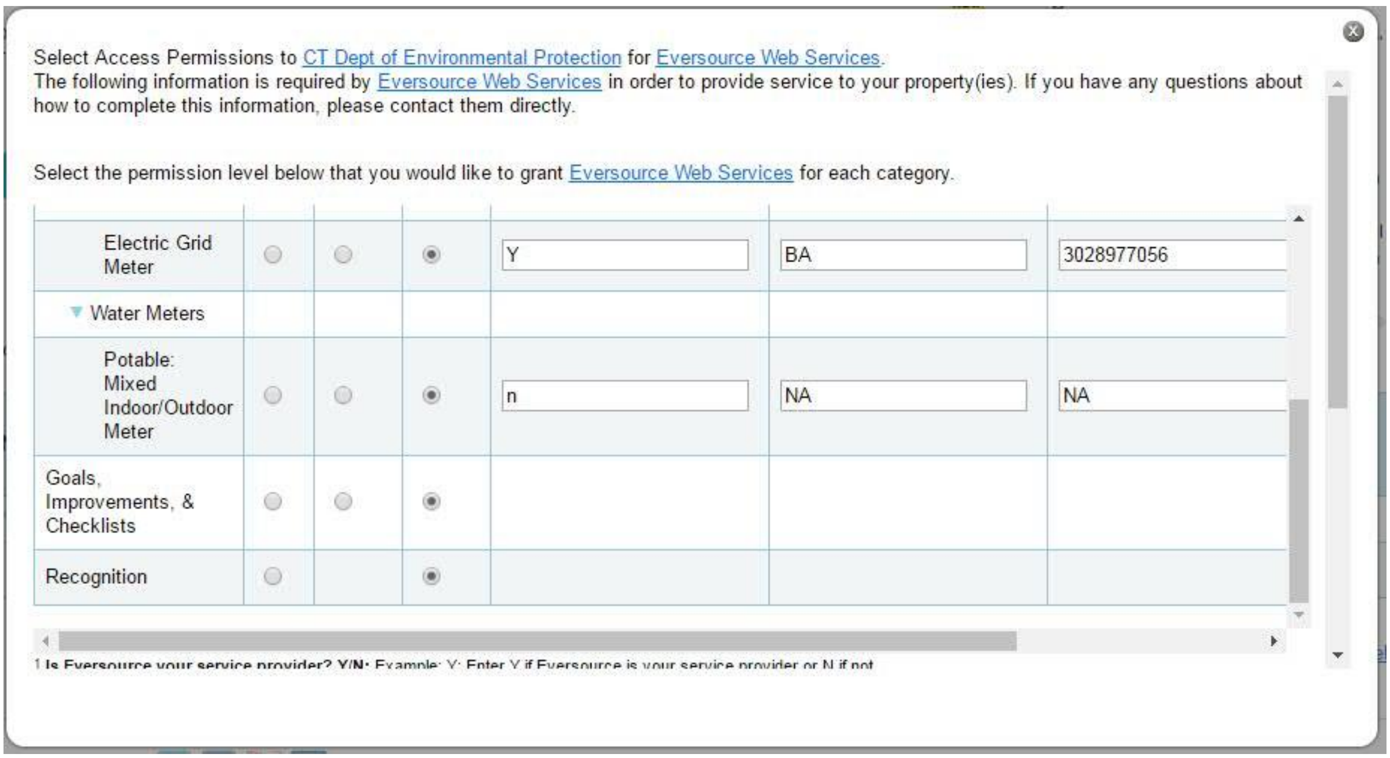
e) **Usage History Load Required? Y/N**. Generally, if you are setting up a meter for the first time, you will select **Y** for having a history load input. If you have an existing meter with information already in it, you will enter **N** for only allowing data to be entered from the present date forward (this prevents duplicates)

Please note:

- *For the history load input, Eversource provides data back to 1/1/2013 before transmitting monthly data going forward*
- *If you have been manually entering your usage data in an existing meter, you may experience a gap on the initial incremental load. This gap is due to the Eversource billing system transfer protocol. Eversource can provide any gap information you need upon request*
- *Incremental data transfer will occur after the billing postdate of that account or meter*
- *Incremental data transfer will continue uninterrupted on an automatic monthly basis until the account owner opts to un-share that account or meter with Eversource*

For **non-Eversource meters** on your property, you will have to enter the following values for fields, or you will receive an error on the share request:

a) **Full Access** for information access, this is still required to retrieve property info.
b) **N** for a non-Eversource account
c) **NA** for the ID field
d) **NA** for Description
e) **N** for history data load



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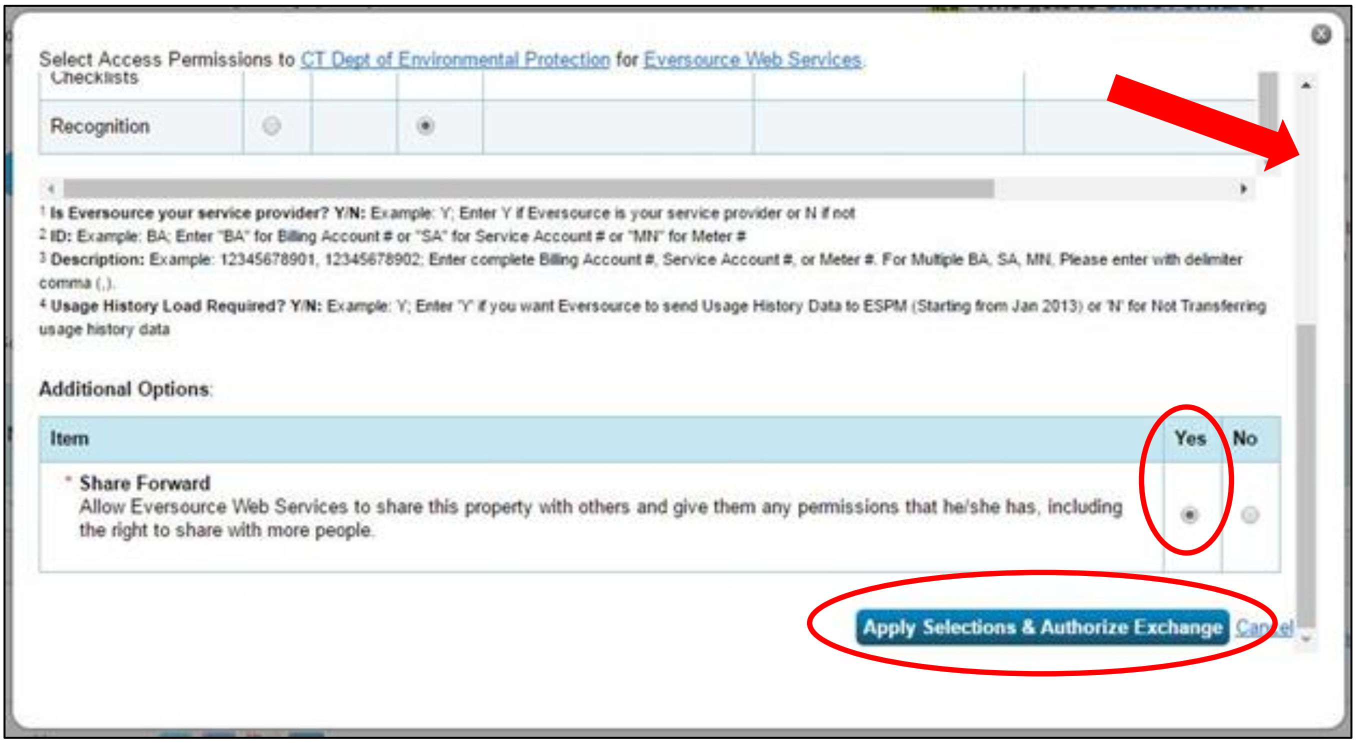
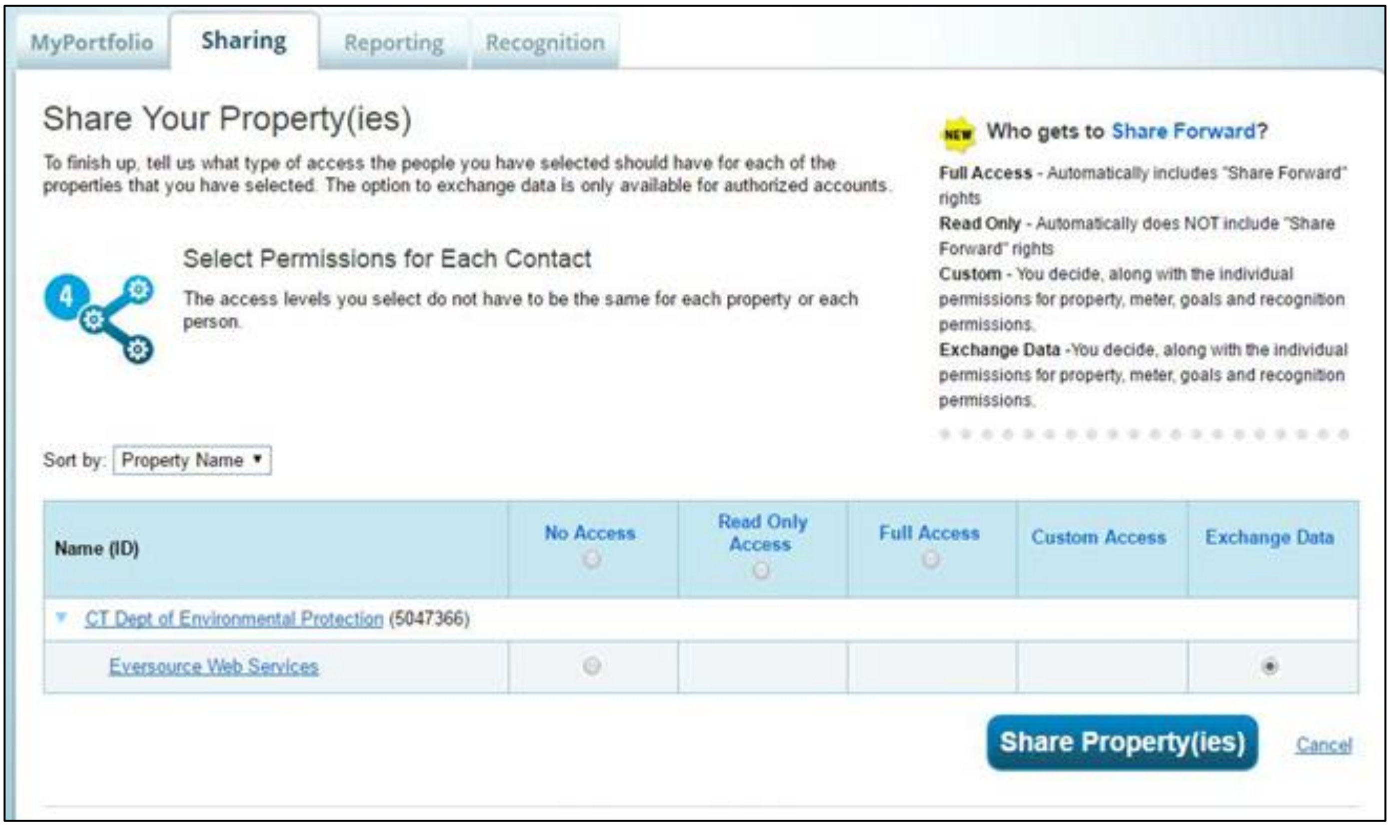
Finally, use the outside scroll bar to access the bottom of the Access Permissions screen. Select **Yes** for the "Share Forward" option. This allows Eversource to share your meter information into other internal accounts in the future. This data will not leave Eversource systems or be shared to vendors outside of Eversource.



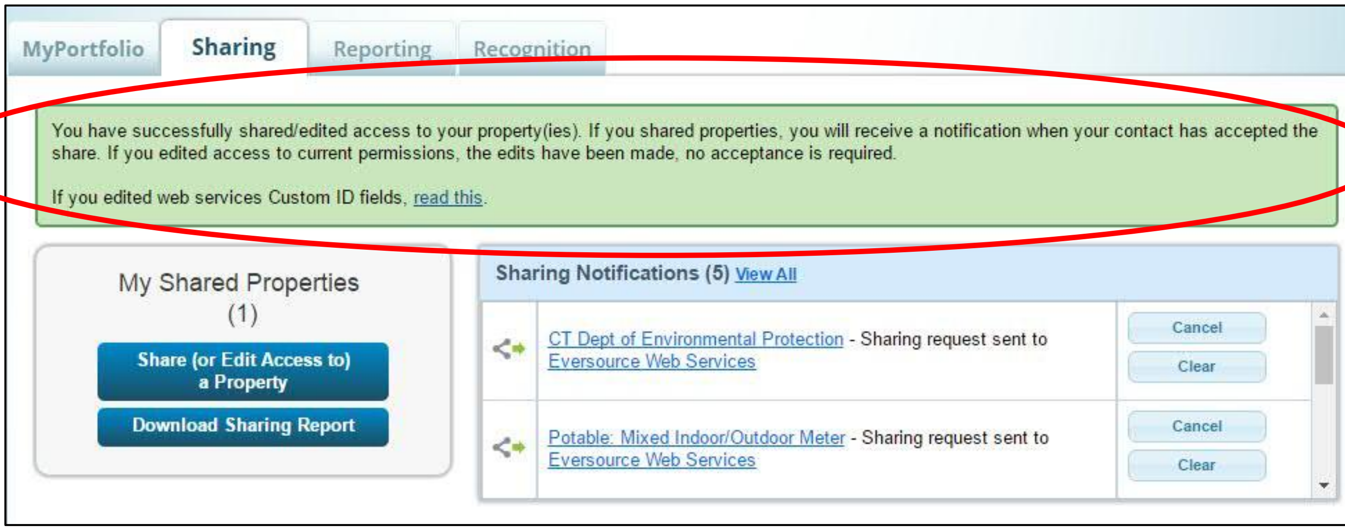
Click "Apply Selections & Authorize Exchange"

9. After you return to the “Share Your Property(ies)” screen, the “Exchange Data” option will be checked, indicating you filled out the authorization.
   If you have any other properties you are authorizing for data exchange, you will have to repeat Step 8 for those as well.



Click “Share Property(ies)” to finalize the authorization request.

10. You will receive following notification confirming the request went through.
You will receive another notification in one business day confirming or denying that the request was processed.



From now on, your Portfolio Manager account will be set up to receive automatic usage and cost information from Eversource!
If you have difficulty with any of the steps or would like additional assistance, please contact us at Eversource_ESPM_Support@eversource.com.