

# Submitting Data through Portfolio Manager for Ontario's Energy and Water Reporting and Benchmarking Initiative

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Ministry of Energy  
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Similarly, if you need accessibility assistance using Portfolio Manager, please contact us.

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## About Ontario's Energy and Water Reporting and Benchmarking (EWRB) Initiative

Energy and water usage can represent some of the largest operating costs in your building, but Ontario's Energy and Water Reporting and Benchmarking (EWRB) initiative can help you:

- Save money by tracking your energy and water usage
- Identify energy and water efficiency opportunities
- Compare your building's performance to similar buildings

Under the [Reporting of Energy Consumption and Water Use regulation](#), if a building is 50,000 square feet or larger, the owner needs to report the building's energy and water use once a year to the Ministry of Energy. The initiative is being phased in as follows:

- Buildings 100,000 square feet and larger must start reporting by **July 1, 2019**.
- Buildings 50,000 square feet and larger must start reporting by **July 1, 2023**.

## The Portfolio Manager Guide and Other Resources

This document will guide you through the process of entering your energy and water consumption data into Portfolio Manager specifically for EWRB reporting.

On the next page, there is a reporting checklist that describes the major steps to reporting.

**Here are some other resources that may help you with future questions about reporting:**

- The [EWRB homepage](#) provides an overview of the initiative, reporting requirements and benefits of reporting
- The [Guide to Energy and Water Reporting](#) provides detail on the EWRB reporting steps and requirements, including building types, collecting usage data and exemptions
- The [Portfolio Manager training website](#) provides training content, demonstration videos and how-to FAQs on a wide variety of Portfolio Manager features

### Stay informed

The best way to stay informed about EWRB is to update your organization's EWRB Reporting Lead contact information. The EWRB reporting lead is the person who will receive EWRB emails for each of the buildings which a corporation owns. You can update the information any time the contact information for your corporation's reporting lead changes.

To update your EWRB Reporting Lead contact information, please complete this [form](#).

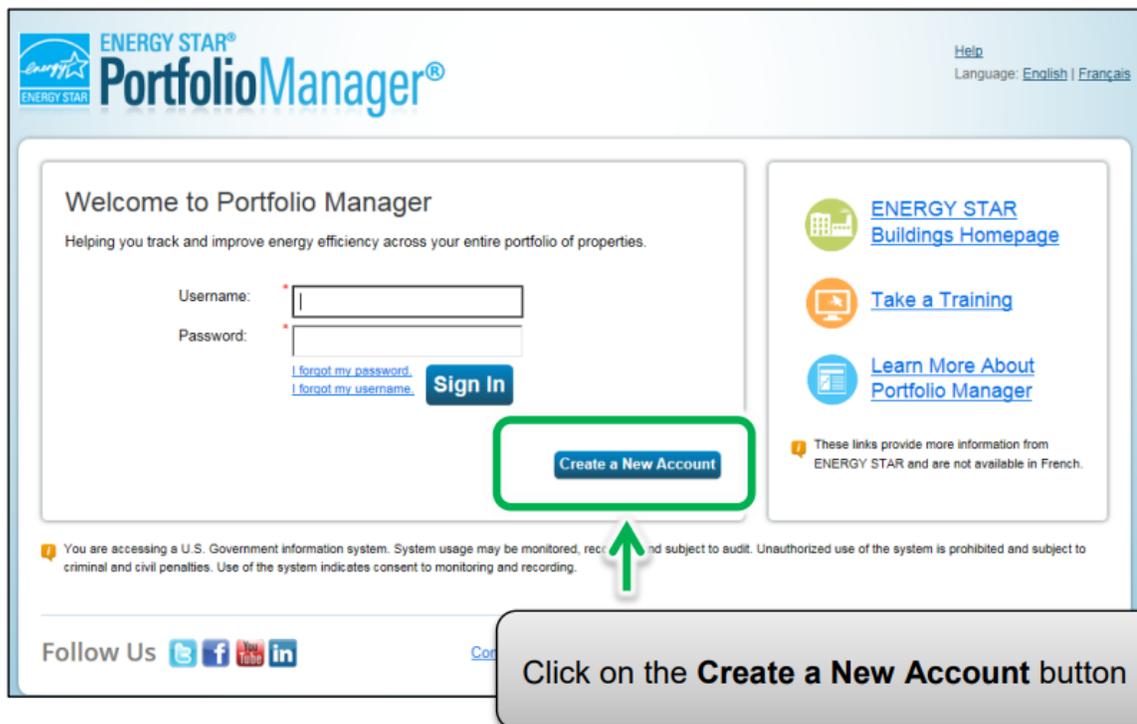
### Contact us

If you have a question, please contact **EWRB Support** at 1-844-274-0689 or [ewrbsupport@ontario.ca](mailto:ewrbsupport@ontario.ca).

# 1 – Creating a Portfolio Manager Account

The following are the steps to create a Portfolio Manager account.

1. Open your web browser and go to the Portfolio Manager log-in page at <https://portfoliomanager.energystar.gov/pm/login.html>.
2. Click on the **Create a New Account** button.



- The screen will reload to show the **Create an Account** page. Enter the required information. Fields marked with a red asterisk are mandatory.

**ENERGY STAR®**  
**PortfolioManager®**

[Help | Login](#)  
Language: [English](#) | [Français](#)

**Create an Account** Already have an account? [Sign In Here](#)

#### Accessing Your Account

Username: \*  ✔ Name Available!

Password: \*  ✔ Secure  
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: \*  ✔ Passwords Match

#### 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: \*

#### 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.

4. Under the **About Yourself** section, for the **Reporting Units** field, select the **Conventional EPA Units (e.g., kBtu/ft<sup>2</sup>)** option.

The screenshot shows a form titled "About Yourself" with the following fields: First Name (John), Last Name (Smith), Job Title (ACME Property Administrator), Email (jsmith@acme.ca), Confirm Email (jsmith@acme.ca), Phone (4165551234), Country (Canada), and Language (English). The "Reporting Units" field is highlighted with a green box and contains two radio button options: "Conventional EPA Units (e.g., kBtu/ft<sup>2</sup>)" (selected) and "Metric Units (e.g., GJ/m<sup>2</sup>)". A grey callout box with a green arrow points to the "Conventional EPA Units" option, containing the text "Select the **Conventional EPA Units (e.g., kBtu/ft<sup>2</sup>)** option".

**Searchability in Portfolio Manager** section of the form, select the **Yes** option.

The screenshot shows a form titled "Searchability in Portfolio Manager" with a single question: "Can other people search for you and send you a [connection request](#)?" The question is highlighted with a green box. To the right of the question are two radio button options: "Yes" (selected) and "No". A grey callout box with a green arrow points to the "Yes" option, containing the text "Select the **Yes** option".

6. Once you have entered all the requested information, click on the **Create Account** button to create the account.
  
7. You will receive an email message from Energy Star to activate your new Portfolio Manager account. Within 24 hours, follow the instructions in the email to complete the account creation process.

## 2 – Entering Data

Once you have created an account and are logged in, you can start adding your data. There are three different methods to add your data, listed below. This guide shows you how to enter data using the web form.

1. **Web Form:** This method allows you to enter your data manually — one building at a time — both for initial data entry and data updates.
2. **Microsoft Excel** - If you're already using Excel to track data or you have several buildings, you may want to import your data straight from Excel. This method is faster for large numbers of buildings.

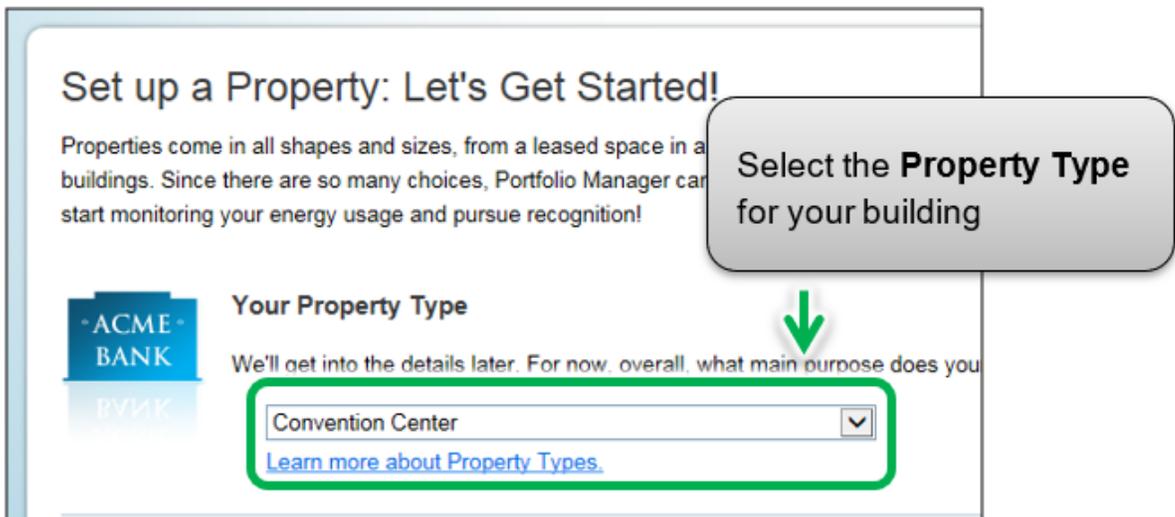
This method is not recommended unless you have a good understanding of Excel. **This method does not automatically cover all the data requirements needed to report for EWRB**, so you will need to first use the web form method described above for at least one property to understand which fields are required for EWRB.

3. **Web Services** - Many leading energy services companies exchange data directly with Portfolio Manager. These companies can upload your energy and water data for you. If you decide to use web services provided by a third party, you are responsible for ensuring the quality and accuracy of the data submitted.

## 2.1 – Adding and Setting Up a Property

The following are the steps to add and set up a property.

1. Click on the **Add a Property** button under the **MyPortfolio** tab.



3. In the **Your Property's Buildings** section, indicate the number of buildings included on the property.

Indicate the number of buildings on the property



### Your Property's Buildings

How many physical buildings do you consider part of your property?

- None: My property is part of a building
- One: My property is a single building
- More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?



### Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

- Existing:** My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.  
using Portfolio Manager to evaluate the energy efficiency of the design project.
- Test Property:** not a real property. I am entering it to test features, or for other purposes such as ing.

Select **Existing** for your property's construction status

**Get Started!** [Cancel](#)

5. Click on the **Get Started!** button to confirm your choices.

**Your Property's Construction Status**

Is your property already built or are you entering this property as a construction project that has not yet been completed?

- Existing:** My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
- Design Project:** My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
- Test Property:** This is not a real property. I am entering it to test features, or for other

Click on the **Get Started!** button

**Get Started!** [Cancel](#)

**Note:** Gross Floor Area is different than Gross Leasable Area. The EWRB initiative requires property owners to report a building's Gross Floor Area. See more on calculating Gross Floor Area on the [EWRB Guide page](#).

**Note:** Occupancy is the percentage of your property's Gross Floor Area that is occupied and operational. See more on calculating Occupancy on [Energy Star's Website](#).

**Set Up a Property: Basic Property Information**

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

**About Your Property**

Name:  \*

Country:  \*

Street Address:  \*

City/Municipality:  \*

County:  \*

State/Province:  \*

Postal Code:  \*

Year Built:  \*

Gross Floor Area:  Sq. Ft.  Temporary Value \*

Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. [Details on what to include.](#)

Irrigated Area:  Sq. Ft. \*

Occupancy:  % \*

Property Photo (optional):  No file chosen

Select an image file on your computer with the format type of .jpg, .jpeg, .png or .gif; photos will be resized to fit a space of 2.78 inches wide x 2 inches tall.

*Note: A callout box with a green arrow points to the form fields, stating: "Fields marked with a red asterisk are mandatory".*

- The screen will reload to show the **How is it used?** page. If your property has multiple building uses, select the desired type of use option from the **Add Another Type of Use** drop-down list and click on the **Add** button. For example, a property may have an “office” and a “restaurant/bar” on the same property.

**Set up a Property: How is it used?**

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

Basic Information

|                              |                     |                 |   |
|------------------------------|---------------------|-----------------|---|
| <b>Name:</b>                 | Brambleberry Towers | <b>Country:</b> | CA  |
| <b>Property Type:</b>        | Office              | <b>Address:</b> | 55 Elm Street<br>Sudbury, ON P3C 1S2 <a href="#">Map It</a> |
| <b>Year Built:</b>           | 1992                |                 |   |
| <b>Property consists of:</b> | 1 building          |                 |   |

[Edit](#)

If applicable, select the additional **Type of Use** from the drop-down list and then click on the **Add** button

Restaurant/Bar [Add](#)  
More Specifically? Restaurant

business activities. This includes administrative and professional offices.

**Gross Floor Area** – If you specified multiple building uses for your property, the combined **Gross Floor Area** for each type of use must be equal to the total **Gross Floor Area** that you specified for the overall property in step 6.

**Office Use** / [Edit Name](#) Delete

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                | 59,340 Sq. Ft.                             | 1/1/1992      | <input type="checkbox"/> |
| ★ Weekly Operating Hours          | 112 <input type="checkbox"/> Use a default | 1/1/2017      | <input type="checkbox"/> |
| ★ Number of Workers on Main Shift | 50 <input type="checkbox"/> Use a default  | 1/1/2017      | <input type="checkbox"/> |
| ★ Number of Computers             | 50 <input type="checkbox"/> Use a default  | 1/1/2017      | <input type="checkbox"/> |
| ★ Percent That Can Be Heated      | 50 % or more                               |               |                          |
| ★ Percent That Can Be Cooled      | 50 % or more                               |               |                          |

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

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**Restaurant Use** / [Edit Name](#)

Restaurant refers to buildings used for preparation and sale of ready-to-eat food and beverages, but which do not fit in the fast food property type. Examples include fast casual, casual, and fine dining restaurants.

Gross Floor Area should include all space within the building(s), including kitchens, sales areas, dining areas, offices, staff break rooms, and storage areas. Gross Floor Area should not include any outdoor/interior seating areas, but the energy use of those floor areas should be reported on your energy meters.

| Property Use Detail    | Value         | Current As Of | Temporary Value          |
|------------------------|---------------|---------------|--------------------------|
| Gross Floor Area       | 5,000 Sq. Ft. | 01/01/1992    | <input type="checkbox"/> |
| Weekly Operating Hours | 98            | 01/01/2017    | <input type="checkbox"/> |

Total combined **Gross Floor Area** must equal total **Gross Floor Area** specified for the overall property

- b. **Weekly Operating Hours, Number of Workers on Main Shift, Number of Computers, Percent That Can Be Heated, and Percent That Can Be Cooled** are not required under the EWRB initiative. If you choose not to enter these, Portfolio Manager will automatically assign default values for the building.

10. Scroll to the **Parking Use** section and, if applicable, enter the Parking Use **Property Use Details**. Portfolio Manager tracks area entered in the **Parking Use** section separately from property **Gross Floor Area**, so you should **NOT** include parking area in the total Gross Floor Area for the overall property.

▼ Parking Use / Edit Name Delete

Parking refers to buildings and lots used for parking vehicles. This includes [open parking lots](#), [partially enclosed parking structures](#), and [completely enclosed \(or underground\) parking structures](#). Parking structures may be free standing or physically connected to the property.

| Property Use Detail                     | Value   | Current As Of | Temporary Value          |
|---|---|---------------|--------------------------|
| Open Parking Lot Size                   | <input type="text"/> Sq. Ft. ▼                              | 01/01/2018    | <input type="checkbox"/> |
| Partially Enclosed Parking Garage Size  | <input type="text"/> Sq. Ft. ▼                              | 01/01/2018    | <input type="checkbox"/> |
| Completely Enclosed Parking Garage Size | <input type="text"/> Sq. Ft. ▼                              | 01/01/2018    | <input type="checkbox"/> |
| Supplemental Heating                    | <input type="text"/> <input type="checkbox"/> Use a default | 01/01/2018    | <input type="checkbox"/> |



If applicable, enter property use details in the **Parking Use** section

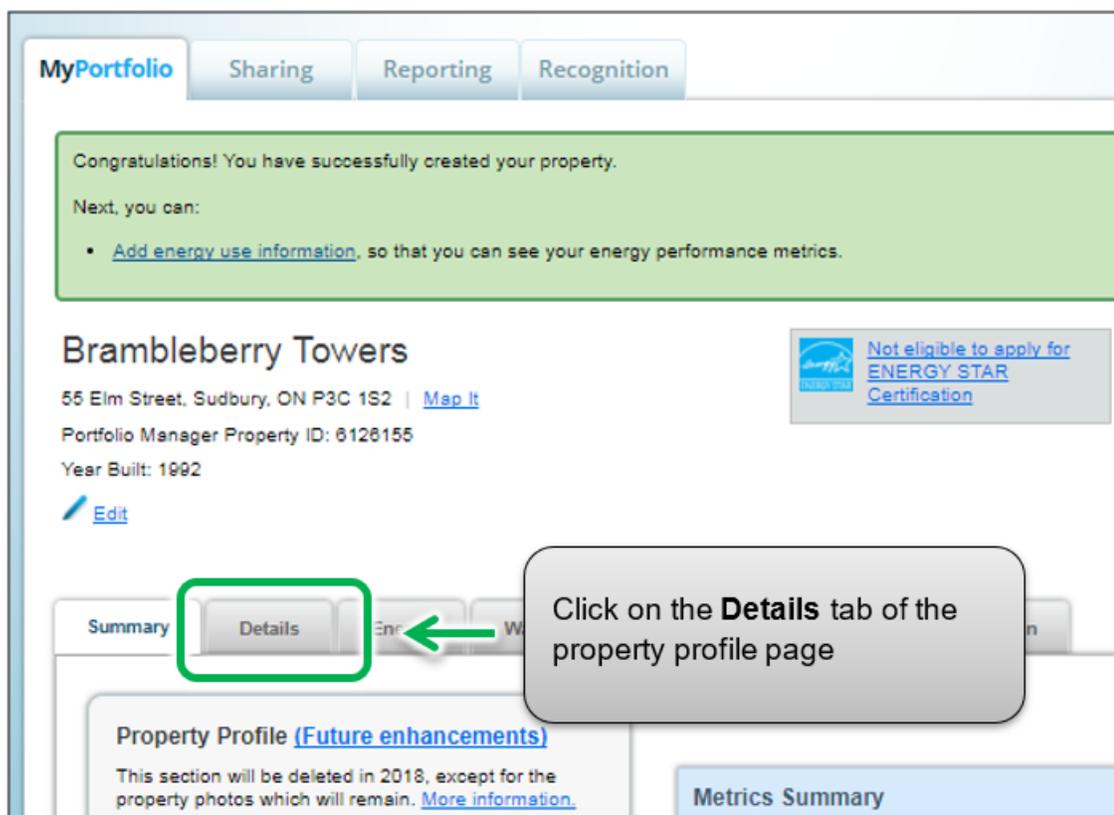
## 2.2 – Adding Your Building's EWRB ID

Once you have completed adding and setting up a property in Portfolio Manager, you will be presented with the property's profile page. From this page you can view summary information, enter the property's details, energy, and water usage, and more.

To successfully submit your report, **it is essential that you enter your building's Ontario EWRB ID information in the Details tab of the property's profile page.**

**The following are the steps to add your building's EWRB ID to the property profile.**

1. Continuing from where we left off in the previous section, click on the **Details** tab of the property profile page.



- The page will refresh to show the **Details** section. Scroll down the page to view the **Unique Identifiers (IDs)** section and click on the **Edit** button found in the section.

The screenshot shows a software interface with a navigation bar at the top containing tabs for Summary, Details, Energy, Water, Waste & Materials, Goals, and Design. The 'Details' tab is active.

**Basic Information**

- Construction Status:** Test property that is one single building
- Property GFA - Self-Reported:** 64,340 Sq. Ft.
- Occupancy:** 80%
- Edit** button

**Property Uses and Use Details**

[View as Diagram](#)

| Name                    | Property Use Type | GFA |
|-------------------------|-------------------|-----|
| ▶ Convention Center Use | Convention Center | 59  |
| ▶ Restaurant Use        | Restaurant        | 5   |

Property GFA (Buildings): 64  
Property GFA (Parking): 0

**Unique Identifiers (IDs)**

- Portfolio Manager ID:** 6023547
- Custom IDs:** None
- Standard IDs:** None
- Edit** button

**Property GFA by Use**

Restaurant: 7.77 %

**Click on the **Edit** button**

- The screen will reload to show the **Edit Property Identifiers (IDs)** page. Scroll to the **Standard IDs** box. From the Standard IDs drop-down list, select the **Ontario EWRB ID** option. In the “ID” field, enter the unique six-digit Ontario **EWRB ID** number for your property. For more information on getting the Ontario EWRB ID for your property, see page 7 of this document.



**Important: Your data will be rejected if you do not enter the correct Ontario EWRB ID for your property.**

### Standard IDs

Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

Standard ID(s):

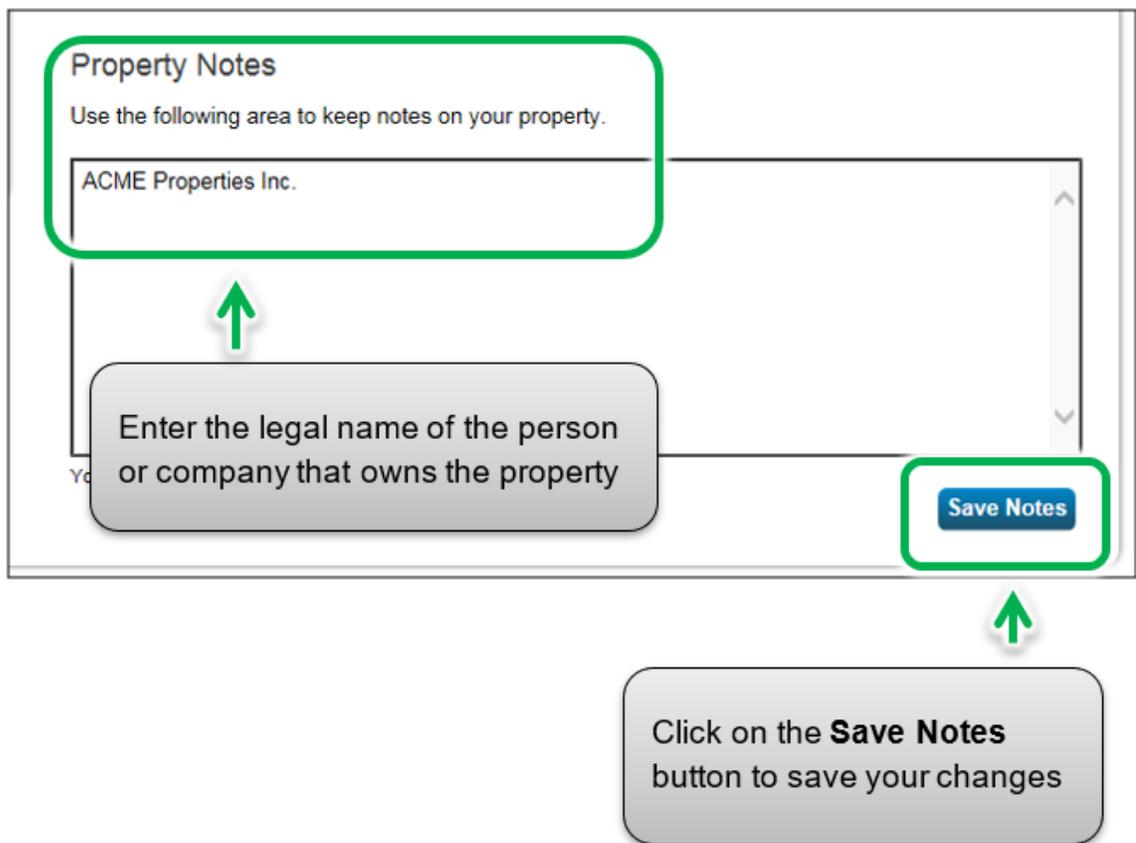
|  |   |
|--|---|
| <input type="text" value="Ontario EWRB ID"/> | ID: <input type="text" value="123456"/> |
|  | <a href="#">+ Add Another</a>           |

Select the **Ontario EWRB ID** option from the drop-down list, and then enter the **EWRB ID**. The number here is an example only.

## 2.3 – Adding Property Notes

The following are the steps to add property notes to the property profile. This section is optional.

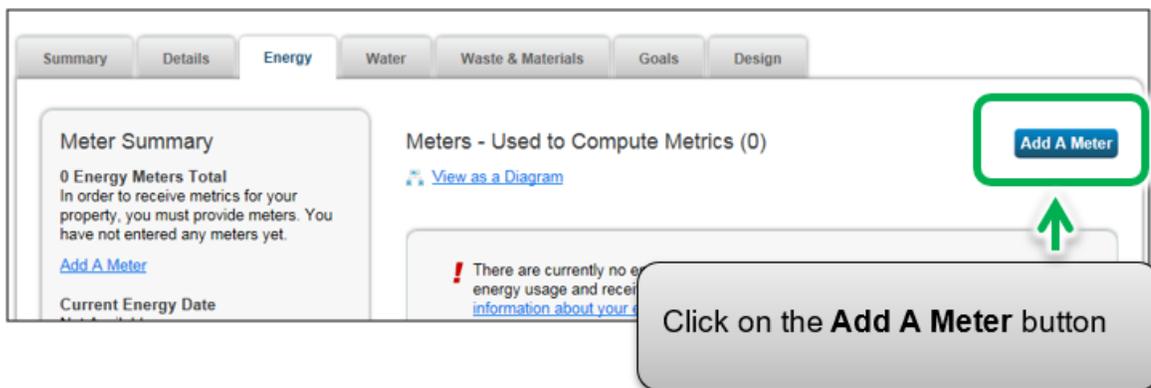
1. Once you have entered your Ontario EWRB ID and saved your changes, you will be returned to the **Details** tab page. Scroll to the lower part of the page and locate the **Property Notes** section. Click in the **Property Notes** field and enter the legal name of the person or company that owns the property, then click on the **Save Notes** button just below the field to save your changes.



## 2.4 – Adding Energy Meters and Energy Consumption Data

The following are the steps to add an energy meter to the property profile.

1. Continuing from the previous section, scroll to the top of the property profile page and click on the **Energy** tab.



3. The screen will reload to show the **Sources of Your Property's Energy** page. You will be presented with a list of energy source types – some are normally metered (e.g., electricity and natural gas) while others are often measured another way (e.g., propane and wood). Select all of the types that apply to your property. Depending on the type of meter selected, you will be prompted to select additional related options.

The screenshot shows a web form titled "Sources of Your Property's Energy" with a lightning bolt icon. The instruction reads: "What kind of energy do you want to track? Please select all that apply." The form contains a list of energy sources with checkboxes and input fields. A green rounded rectangle highlights the "Electric" and "Natural Gas" sections. A grey callout box with an arrow points to this highlighted area, containing the text: "Select all of the energy source types that apply to your property". At the bottom right, another grey callout box with an arrow points to a blue "Get Started!" button, containing the text: "Click on the **Get Started!** Button to save your changes". A "Help" button is visible in the bottom left corner, and a "ancel" link is in the bottom right corner.

**Sources of Your Property's Energy**

What kind of energy do you want to track? Please select all that apply.

- Electric
  - purchased from the grid
  - How Many Meters?
  - generated onsite with my own solar panels
  - generated onsite with my own wind turbines
- Natural Gas
- How Many Meters?
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Coal (anthracite)
- Coal (bituminous)
- Coke
- Wood
- Kerosene
- Fuel Oil (No. 1)
- Other:

[Help](#) [ancel](#)

**Get Started!**

Select all of the energy source types that apply to your property

Click on the **Get Started!** Button to save your changes

- The page will reload to show the **About Your Meters** page with a table listing the meter types you selected in the previous step. Under the **Meter Name** column, click on the name for the first meter type listed and enter the desired label for the meter.

**About Your Meters for Brambleberry Towers**

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's

**2 Energy Meters for Brambleberry Towers (click table to edit)**

| <input type="checkbox"/> | Meter Name          | Type            | Other Type | Units | Date Meter became Active | In Use?                             | Date Meter became Inactive | En De |
|--------------------------|---------------------|-----------------|------------|-------|--------------------------|-------------------------------------|----------------------------|-------|
| <input type="checkbox"/> | Natural Gas         | Natural Gas     |            |       |                          | <input checked="" type="checkbox"/> |                            |       |
| <input type="checkbox"/> | Electric Grid Meter | Electric - Grid |            |       |                          | <input checked="" type="checkbox"/> |                            |       |

Click on the name for the **Meter Name** field and enter the desired label for the meter

| <input type="checkbox"/> | Meter Name          | Type            | Units        | Date Meter became Active | In Use?                             |
|--------------------------|---------------------|-----------------|--------------|--------------------------|-------------------------------------|
| <input type="checkbox"/> | Union Gas           | Natural Gas     | Cubic meters |                          | <input type="checkbox"/>            |
| <input type="checkbox"/> | Electric Grid Meter | Electric - Grid |              |                          | <input checked="" type="checkbox"/> |

Select the unit of measure from the **Units** drop-down list

7. Under the **Date Meter became Active** column, click on the calendar icon and select the date the meter became active. Portfolio Manager will only allow you to enter usage data with dates later than the date the meter became active.

The screenshot shows a table with columns: Meter Name, Type, Other Type, Units, Date Meter became Active, In Use?, and Date Meter became Inactive. A calendar is open over the 'Date Meter became Active' column, showing November 1992. A callout box points to the calendar with the text: "Select the date the meter became active".

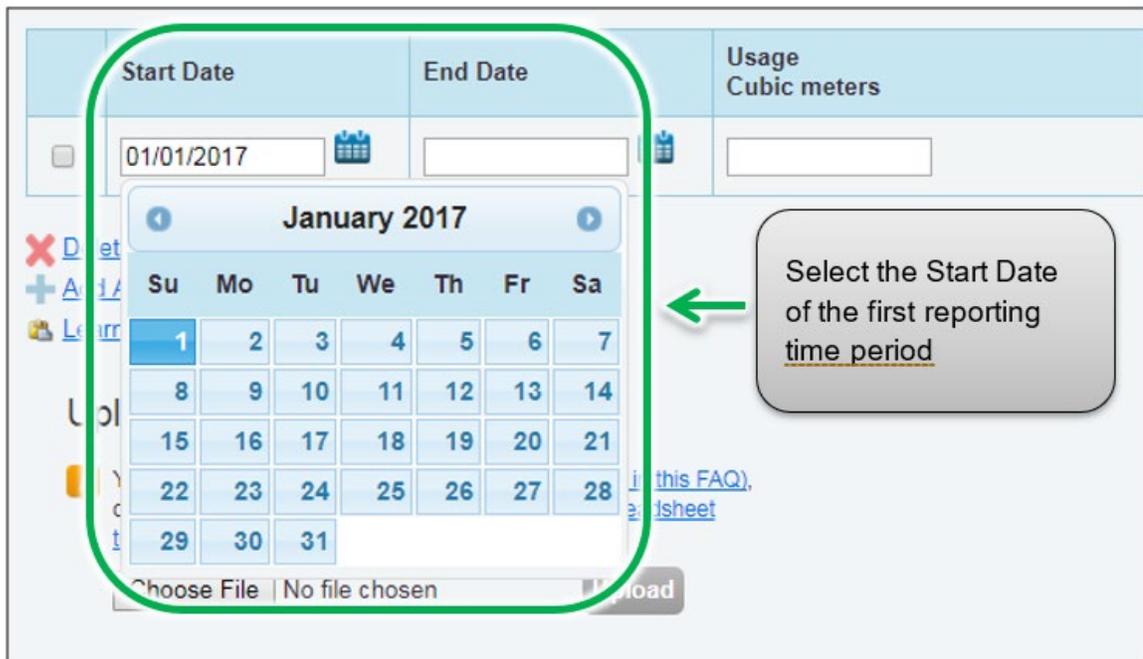
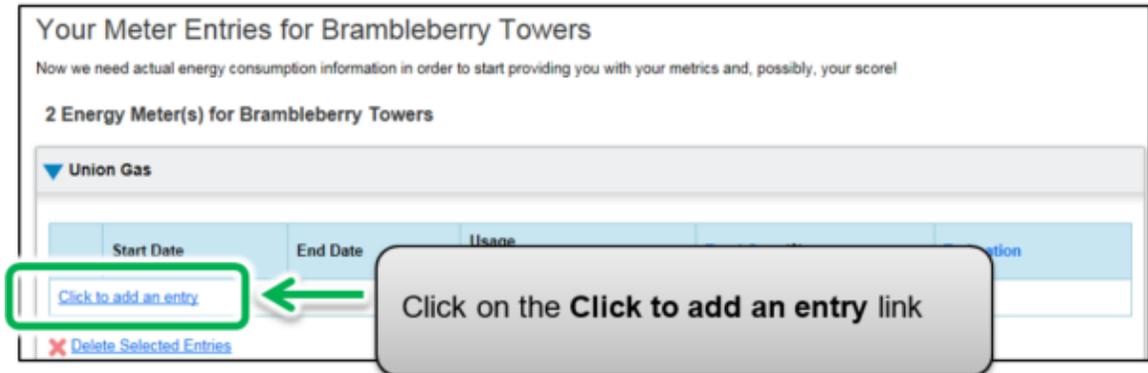
| Meter Name                                      | Type            | Other Type | Units                     | Date Meter became Active | In Use?                             | Date Meter became Inactive |
|---|-----------------|------------|---------------------------|--------------------------|-------------------------------------|----------------------------|
| <input checked="" type="checkbox"/> Natural Gas | Natural Gas     |            | Cubic meters              | 11/02/1992               | <input checked="" type="checkbox"/> |                            |
| <input type="checkbox"/> Electric - Grid        | Electric - Grid |            | kWh (thousand Watt-hours) |                          | <input type="checkbox"/>            |                            |

9. Once you have entered the necessary information for all meters, click the **Create Meters** button to confirm your changes and proceed to the next step.

The screenshot shows the same table as above, but now with two rows of data entered. A callout box points to the 'Create Meters' button with the text: "Click on the Create Meters button". Another callout box points to the table with the text: "Enter the information for all meters".

| Meter Name                             | Type            | Other Type | Units                     | Date Meter became Active | In Use?                             | Date Meter became Inactive | Enter as Delivery?       |
|--|-----------------|------------|---------------------------|--------------------------|-------------------------------------|----------------------------|--------------------------|
| <input type="checkbox"/> Union Gas     | Natural Gas     |            | Cubic meters              | 11/02/1992               | <input checked="" type="checkbox"/> |                            | <input type="checkbox"/> |
| <input type="checkbox"/> Toronto Hydro | Electric - Grid |            | kWh (thousand Watt-hours) | 11/02/1992               | <input checked="" type="checkbox"/> |                            | <input type="checkbox"/> |

10. The screen will reload to show the **Your Meter Entries** page. In the section for the first meter, click on the **Click to add an entry** link.



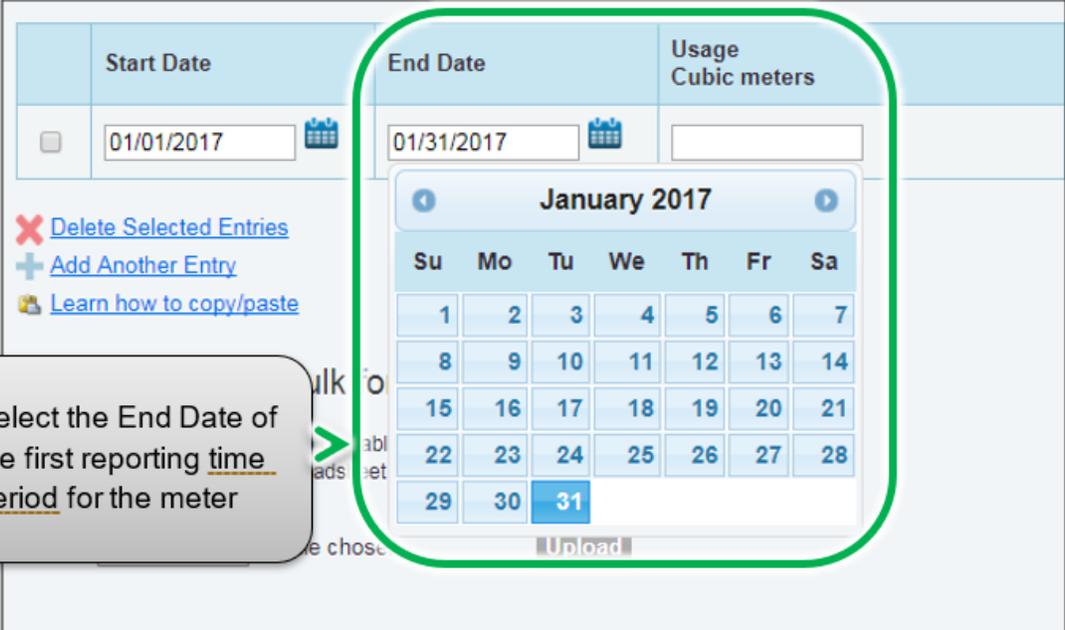
**Note:** If you are unable to obtain meter consumption data that begins on January 1 and ends on December 31, you can enter data that includes consumption outside of the reporting year. Portfolio Manager will then prorate the consumption data.

**Example:** You need to report your energy consumption from January 1, 2018 to December 31, 2018 and your billing cycle ends on the 20<sup>th</sup> of every month.

- The first reporting time period you enter will have a Start Date of December 21, 2017 and an End Date of January 20, 2018.
- The second reporting time period will have a Start Date of January 21, 2018 and an End Date of February 20, 2018.
- The final reporting time period will have a Start Date of December 21, 2018 and an End Date of January 20, 2019 (for a total of 13 monthly entries).

**Note:** Billing cycles cannot overlap. This will result in an error.

12. Under the **End Date** column, click on the calendar icon to select the end date of the first reporting time period for the meter. Whenever possible, report your usage using the smallest available time periods. Portfolio Manager cannot weather-normalize usage data reported in periods longer than 65 days and will not be able to calculate your building's energy use intensity.



The screenshot shows a data entry interface with three columns: Start Date, End Date, and Usage Cubic meters. The Start Date field contains '01/01/2017' and the End Date field contains '01/31/2017'. A calendar pop-up for January 2017 is open over the End Date field, with the date '31' selected. A green rounded rectangle highlights the End Date field and the calendar. Below the calendar is an 'Upload' button. To the left of the calendar, there are three links: 'Delete Selected Entries' (with a red X icon), 'Add Another Entry' (with a blue plus icon), and 'Learn how to copy/paste' (with a document icon). A grey callout box with a green arrow pointing to the calendar contains the text: 'Select the End Date of the first reporting time period for the meter'.

| Start Date | End Date   | Usage Cubic meters |
|------------|------------|--------------------|
| 01/01/2017 | 01/31/2017 |                    |

January 2017

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 |    |    |    |    |

Upload

Delete Selected Entries  
Add Another Entry  
Learn how to copy/paste

Select the End Date of the first reporting time period for the meter

13. Enter the consumption data for the selected reporting time period. If the building has not consumed energy at this meter or source during the time period, '0' must be entered.

|                          | Start Date | End Date  | Usage<br>Cubic meters | Total Cost (\$) |
|--------------------------|------------|-----------|-----------------------|-----------------|
| <input type="checkbox"/> | 1/31/2017  | 1/31/2017 | 5,603                 |                 |

  
**Enter consumption data**

14. Click on the **Add Another Entry** and repeat steps 11 through 13 for each reporting time period until you have finished entering consumption data for the full year. Ensure that the **Start Date** of your new entry is the same day, or one day after, the **End Date** of the previous entry.

|                          | Start Date  | End Date  | Usage<br>Cubic meters |
|--------------------------|---|---|-----------------------|
| <input type="checkbox"/> | 1/31/2017   | 1/31/2017   | 5,603                 |
| <input type="checkbox"/> | <input type="text" value="02/01/2017"/>  | <input type="text" value="02/28/2017"/>  | <input type="text"/>  |

 [Delete Selected Entries](#)  
 [+ Add Another Entry](#)   
 [Learn how to copy/paste](#)

**Click on the **Add Another Entry** link to enter additional reporting time periods**

15. When you have completed entering consumption data for the full year in the section for the first meter, scroll to the section for the next meter (if you have more than one) and repeat steps 10 through 14 for each meter that makes up the property's energy use.

16. When you have entered all of the consumption data for all of the meters, click on the **Continue** button to proceed to the next step.

If you add more monthly entries at a later time, click on the **Save Bills** button when you have entered all of your usage data for the meter(s), then click on the name of your building at the top of the page to take you back to your building's Summary tab.

17. The page will reload to show the **Select Energy Meters to Include in Metrics** page. Select all the meters that make up the property's energy consumption and click on the **Apply Selections** button to complete the process and continue to the next section.

**Select Energy Meters to Include in Metrics**

Tell us which meters to include when calculating the Energy metrics for [Brambleberry Towers](#) so that we can provide you with the most accurate metrics possible.

**Summary**

**2**

Meters representing the total energy consumption for [Brambleberry Towers](#) (a single building).

**Energy Meters**

Select all meters to be included in your Energy metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

| <input type="checkbox"/>            | Name<br>Meter ID                          | Type            |
|-------------------------------------|---|-----------------|
| <input checked="" type="checkbox"/> | <a href="#">Union Gas</a><br>32780864     | Natural Gas     |
| <input checked="" type="checkbox"/> | <a href="#">Toronto Hydro</a><br>32780865 | Electric - Grid |

Total of **2 meter(s)**. Tell us what this represents:

- These meter(s) account for the total energy consumption for [Brambleberry Towers](#) (a single building).
- These meter(s) do not account for the total energy consumption for [Brambleberry Towers](#) (a single building).

**About Sub-meters**

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

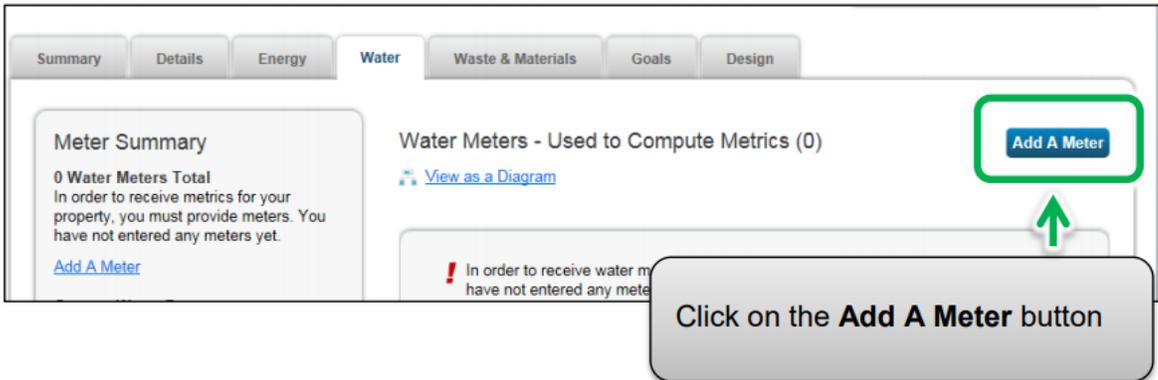
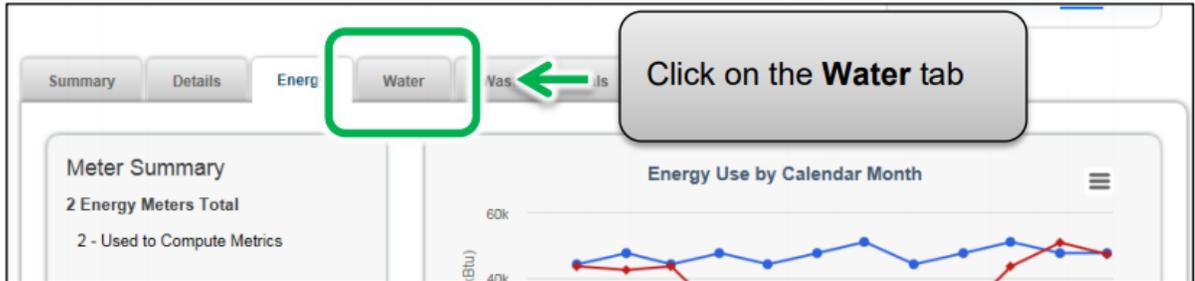
Select all the meters that make up the property's energy consumption and click on the **Apply Selections** button

**Apply Selections**

## 2.5 – Adding Water Meters and Water Consumption Data

The following are the steps to add water usage to the property profile.

1. Continuing from the previous section, scroll to the top of the property profile page and click on the **Water** tab.



3. The screen will reload to show the **Your Property's Water Usage** page. You will be presented with a list of potential meter types. Select all of the types that apply to your property. Depending on the type of meter selected, you will be prompted to select additional related options.

The screenshot shows a web form titled "Your Property's Water Usage" with a water drop icon. The form asks, "What kind of water do you want to track? Please select all that apply". The form contains several checkboxes and a text input field. A green rounded rectangle highlights the "Municipally Supplied Potable Water" section, which includes sub-options for "Indoor", "Outdoor", and "Mixed Indoor/Outdoor", along with a "How Many Meters?" input field set to "1". A grey callout box with a green arrow points to this section, containing the text "Select all of the meter types that apply to your property". Below the form, a blue "Get Started!" button is highlighted with a green rounded rectangle. A grey callout box with a green arrow points to this button, containing the text "Click on the **Get Started!** [button](#) to confirm your changes".

**Your Property's Water Usage**

What kind of [water](#) do you want to track? Please select all that apply

- Municipally Supplied Potable Water
  - Indoor
  - Outdoor
  - Mixed Indoor/Outdoor
- How Many Meters?
- Municipally Supplied Reclaimed Water
- Well Water
- Other:

**Get Started!** [cancel](#)

Click on the **Get Started!** [button](#) to confirm your changes

5. The page will reload to show the **About Your Meters** page with a table listing the meter types you selected in the previous step. Under the **Meter Name** column, click on the name for the first meter type listed and enter the desired label for the meter.

| <input type="checkbox"/> | Meter Name            | Type             | Other Type | Units | Date Meter became Active |
|--------------------------|-----------------------|------------------|------------|-------|--------------------------|
| <input type="checkbox"/> | Greater Sudbury       | Potable Indoor ▼ |            |       | <input type="text"/>     |
| <input type="checkbox"/> | Potable Outdoor Meter | Potable Outdoor  |            |       |                          |

Click on the name for the **Meter Name** field and enter the desired label for the meter

| <input type="checkbox"/> | Meter Name    | Type | Other Type | Units          | Date Meter became Active |
|--------------------------|---------------|------|------------|----------------|--------------------------|
| <input type="checkbox"/> | Greater Sudb  |      |            | Cubic meters ▼ | <input type="text"/>     |
| <input type="checkbox"/> | Potable Outdo |      |            |                |                          |

- Under the **Date Meter became Active** column, click on the calendar icon and select the date the meter became active. Portfolio Manager will only allow you to enter usage data with dates later than the date the meter became active.

The screenshot shows a table with the following columns: Meter Name, Type, Other Type, Units, Date Meter became Active, In Use?, and Date Meter became Inactive. The first row contains 'Greater Sudbury', 'Potable Indoor', and 'Cubic meters'. The 'Date Meter became Active' field is set to '01/01/2017' and has a calendar icon. A calendar pop-up for January 2017 is open, showing the date '1' selected. A callout box with the text 'Select the date the meter became active' has an arrow pointing to the calendar icon. Below the table are buttons for 'Delete Selected Entries', 'Add Another Entry', and 'Back'.

- Once you have entered the necessary information, for all meters, click the **Create Meters** button to confirm your changes and proceed to the next step.

The screenshot shows the same table as above, but now with two rows: 'Greater Sudbury Utilities' and 'Fountain'. The 'Date Meter became Active' field for 'Fountain' is also set to '01/01/2017'. A callout box with the text 'Enter the information for all meters' has an arrow pointing to the 'Add Another Entry' button. Another callout box with the text 'Click on the Create Meters button' has an arrow pointing to the 'Create Meters' button. The 'Create Meters' button is highlighted with a green box.

10. The screen will reload to show the **Your Meter Entries** page. In the section for the first meter, click on the **Click to add an entry** link.

Your Meter Entries for Brambleberry Towers

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

2 Water Meter(s) for Brambleberry Towers

▼ Greater Sudbury Utilities

| Start Date                              | End Date |
|---|----------|
| <a href="#">Click to add an entry</a>   |          |
| <a href="#">Delete Selected Entries</a> |          |

Click on the **Click to add an entry** link to start entering data for the selected meter

Start Date

End Date

Usage  
Cubic meters

01/01/2017

January 2017

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 |    |    |    |    |

Select the Start Date of the first reporting time period

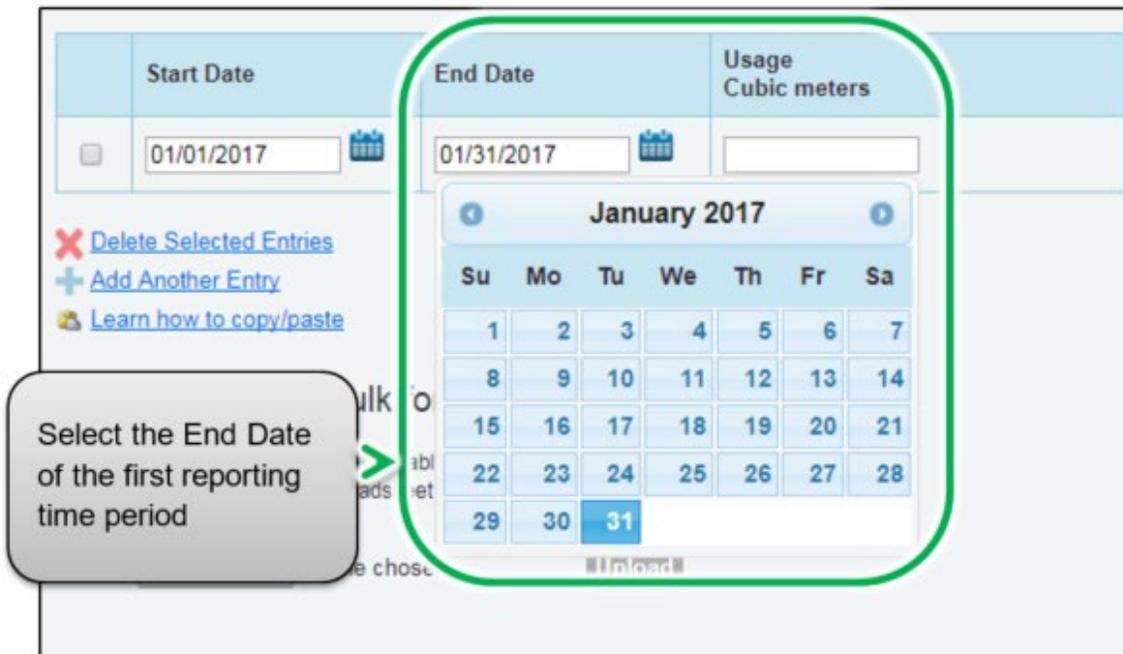
**Note:** If you are unable to obtain meter consumption data that begins on January 1 and ends on December 31, you can enter data that includes consumption outside of the reporting year. Portfolio Manager will then prorate the consumption data.

**Example:** You need to report your energy consumption from January 1, 2018 to December 31, 2018 and your billing cycle ends on the 20<sup>th</sup> of every month.

- The first reporting time period you enter will have a Start Date of December 21, 2017 and an End Date of January 20, 2018.
- The second reporting time period will have a Start Date of January 21, 2018 and an End Date of February 20, 2018.
- The final reporting time period will have a Start Date of December 21, 2018 and an End Date of January 20, 2019 (for a total of 13 monthly entries).

**Note:** Billing cycles cannot overlap. This will result in an error.

12. Under the **End Date** column, click on the calendar icon to select the end date of the first reporting time period for the meter. Whenever possible, report your usage using the smallest available time periods. Portfolio Manager cannot weather-normalize usage data reported in periods longer than 65 days and will not be able to calculate your building's energy use intensity.



13. Enter the consumption data for the selected reporting time period. If the building has not consumed water at this meter during the time period, enter '0'.

|                          | Start Date | End Date  | Usage<br>Cubic meters | Total Cost (\$) |
|--------------------------|------------|-----------|-----------------------|-----------------|
| <input type="checkbox"/> | 1/1/2017   | 1/31/2017 | 473                   |                 |



Enter consumption data

14. Click on the **Add Another Entry** link and repeat steps 11 through 13 for each reporting time period until you have finished entering consumption data for the full year. Ensure that the **Start Date** of your new entry is the same day, or one day after, the **End Date** of your previous entry.

|                          | Start Date  | End Date  | Usage<br>Cubic meters |
|--------------------------|---|---|-----------------------|
| <input type="checkbox"/> | 1/1/2017  | 1/31/2017   | 473                   |
| <input type="checkbox"/> | <input type="text" value="02/01/2017"/>  | <input type="text" value="02/28/2017"/>  | <input type="text"/>  |

[+ Add Another Entry](#) 

Click on the **Add Another Entry** link to enter additional reporting time periods

16. When you have entered all of the consumption data for all of the meters, click on the **Continue** button to proceed to the next step.

17. The page will reload to show the **Select Water Meters to Include in Metrics** page. Select all the meters that make up the property's water consumption and click on the **Apply Selections** button to complete the process and continue to the next section.

**Select Water Meters to Include in Metrics**

Tell us which meters to include when calculating the Water metrics for Brambleberry Towers so that we can report the most accurate metrics possible.

**Summary**

**2**

Please tell us what your meters represent.

**Water Meters**

Select all meters to be included in your Water metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

| <input type="checkbox"/>            | Name<br>Meter ID                                      | Type            |
|-------------------------------------|---|-----------------|
| <input checked="" type="checkbox"/> | <a href="#">Greater Sudbury Utilities</a><br>35880327 | Potable Indoor  |
| <input checked="" type="checkbox"/> | <a href="#">Fountain</a><br>35880329                  | Potable Outdoor |

**Total of 2 water meter(s).** Tell us what these meter(s) measure:

- These meter(s) account for the total water consumption for [Brambleberry Towers](#) (a single building).
- These meter(s) do not account for the total water consumption for [Brambleberry Towers](#) (a single building).

**About Sub-meters**

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

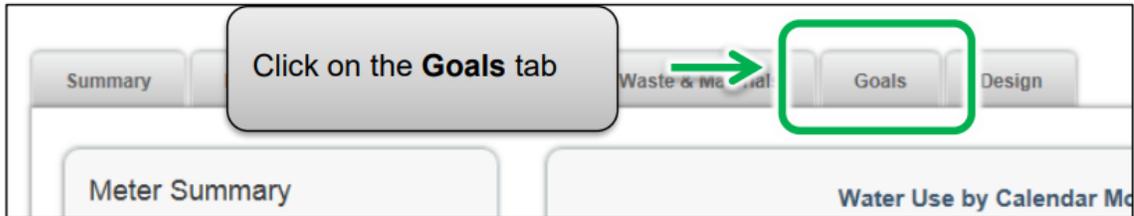
**Apply Selections** [Cancel](#)

Select all the meters that make up the property's water consumption and click on the **Apply Selections** button

## 2.6 – Third-Party Certifications

The following are the steps to add a third-party certification (if the building has one) to the property profile.

1. Continuing from the previous section, scroll to the top of the page and click on the **Goals** tab.



3. The screen will reload to show the **Sustainable Buildings Checklist** page. In the **About this Checklist** section of the page, click on the **Select a Third Party** link.

**Sustainable Buildings Checklist: Brambleberry Towers**

The Sustainable Buildings Checklist evaluates sustainability in existing buildings. It was first developed by the U.S. Green Building Council (USGBC) and the U.S. Green Building Council (USGBC) Federal Guiding Principles for High Performance Sustainable Buildings. It can also be used to evaluate buildings against the [2016 Guiding Principles](#) are on hold. In the meantime, the 2016 Guiding Principles can be used.

**About this Property**

Property Name: [Brambleberry Towers](#) [View Details & IDs](#)

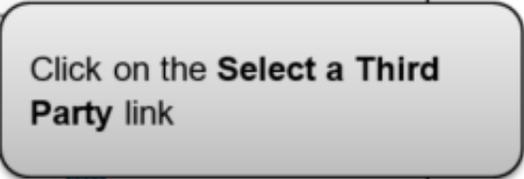
**About this Checklist (Last Updated: 08/30/2017)**

Estimated Date of *Sustainable Buildings Checklist* Compliance:

Actual Date of *Sustainable Buildings Checklist* Compliance:

Third Party Certification: None [Select a Third Party](#)

Checklist Manager:  [Add Contact](#)



Click on the **Select a Third Party** link

**Add/Edit Third Party Certifications: [Brambleberry Towers](#)**

Enter your third party certification:

Third-party Certification?

- LEED Certification
  - Target Date of Certification: 06/20/2017
  - Actual Date of Certification: 06/20/2017
- Green Globes
- Other: BOMA Best
  - Target Date of Certification: 7/1/2016
  - Actual Date of Certification: 7/7/2016

Select the applicable certifications, enter the required dates, and click on the **Save Certifications** button

**Save Certifications**

5. You will be returned to the **Sustainable Buildings Checklist** page. Scroll to the bottom of the page and click on the **Save & Close** button to confirm your changes and proceed to the next step.

**Notes/Comments:**

Click on the **Save & Close** button to confirm your changes

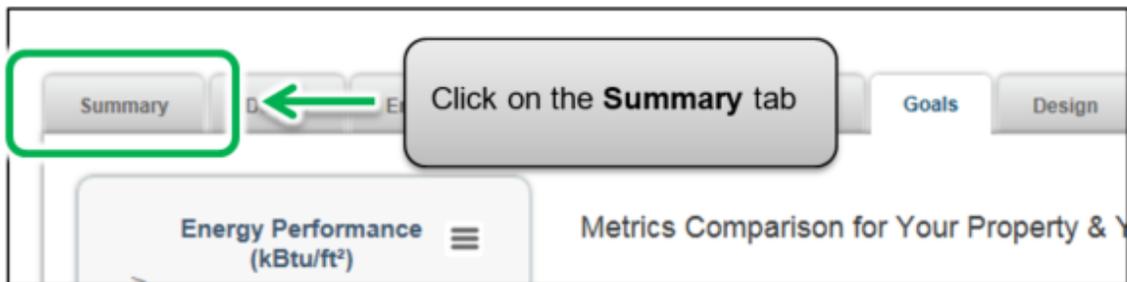
**<< Back** **Save & Close** **Save & Continue >>** [Cancel](#)

## 2.7 – Checking for Possible Errors

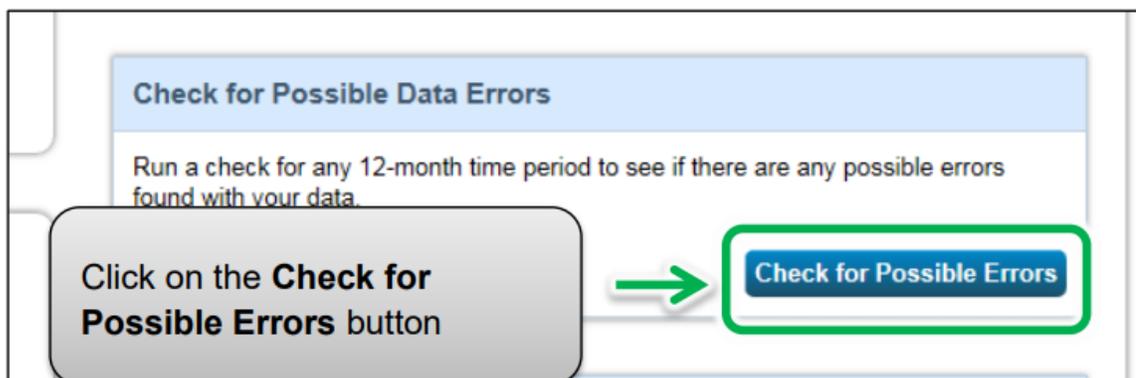
 **Important: The Data Quality Checker is NOT a substitute for data verification because it does not identify all issues. A certified professional will need to verify data for properties with a gross floor area of 100,000 square feet or more – see the next section for more details on data verification.**

The following are the steps to check for possible errors in your property's profile.

1. Continuing from the previous section, scroll to the top of the page and click on the **Summary** tab.



**Check for Possible Data Errors** section. Click on the **Check for Possible Errors** button.



3. The screen will reload to show the **Data Quality Checker** page. Select the **Year Ending** date for the error check – it will be December 31 of the year for which you are reporting data.

**Data Quality Checker for [Brambleberry Towers](#)**

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your 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") to see possible data issues.

Year Ending:

Select the **Year Ending** date for the error check

**Data Quality Checker for [Brambleberry Towers](#)**

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your 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:

5. The **Data Quality Checker** will notify you immediately if there are any issues with your data. Please attempt to fix all issues, particularly those marked with a red alert icon. You can follow the links in the alerts to view and correct your data as needed.

**Data Quality Checker for [Brambleberry Towers](#)**

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your 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 (Metric Year). Select a [Year Ending Date](#) and click "run checker".

Year Ending:   [Re-Run Checker](#)

**Example of an alert. This one is for incomplete data**

**! There is not 12 full months of meter data.**

**Problem:** The following meters do not have 12 full calendar months of meter entries for the year selected (01/01/2016 - 12/31/2016).

- [Union Gas](#) (missing bills for 12/02)

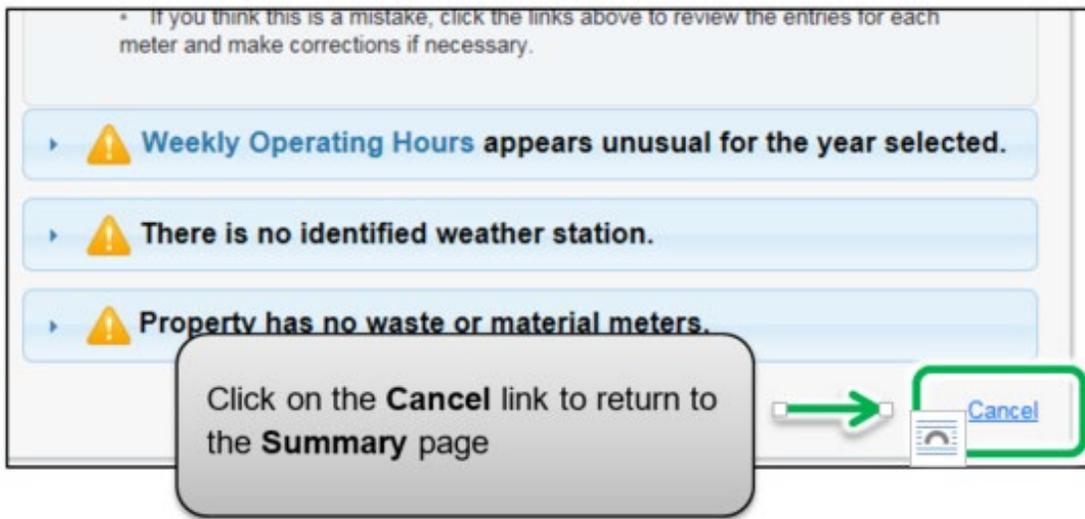
**What to do:**

- If you think this is a mistake, click the links above to review the entries for each meter and make corrections if necessary.

**Follow the links in the alerts to view and correct your data as needed**

[Help](#) **! Weekly Operating Hours appears unusual for the year selected.**

6. After you have addressed each of the alerts in the Data Quality Checker, click on the **Cancel** link at the bottom of the page to return to the **Summary** page.



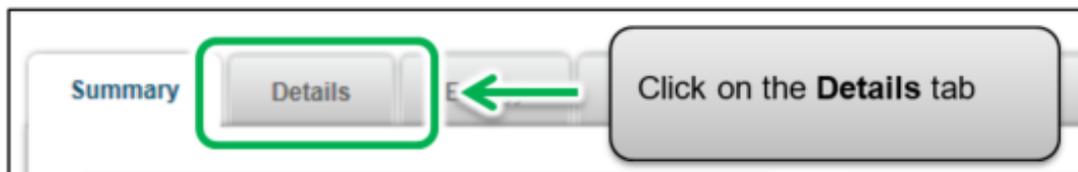
## 2.8 – Data Verification

 **Important:** Properties with a gross floor area of 100,000 square feet or more are required to have their data verified by an accredited or certified professional. To view data verification requirements and examples of acceptable accreditations and certifications, go to [Data Verification Requirements](#).

The accredited or certified professional will conduct a review of your data to ensure there are no errors.

The following are the steps to enter data verification information in your property's profile after your data has been verified.

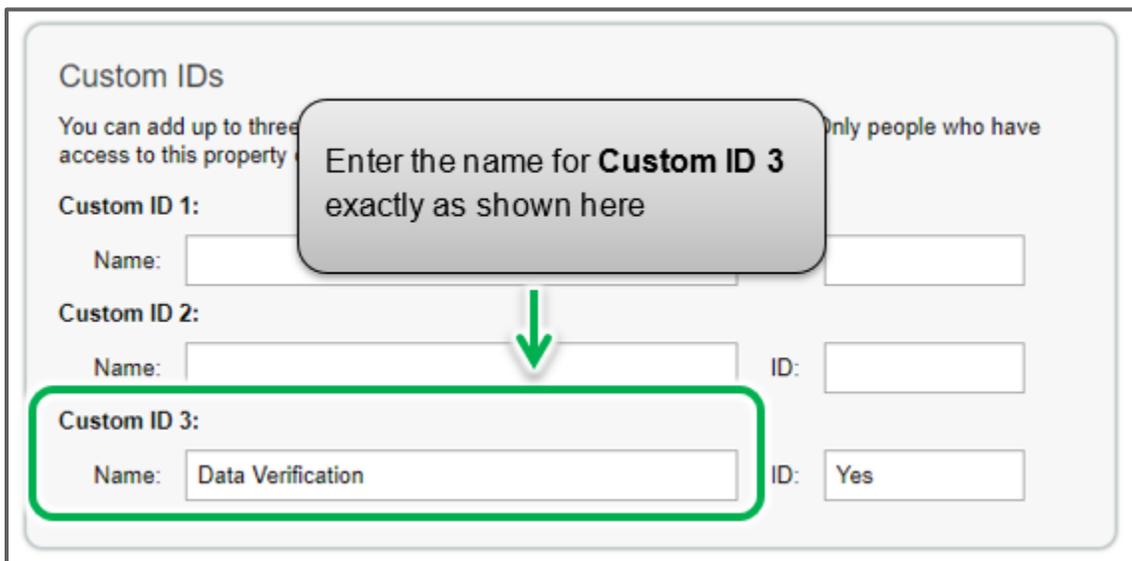
1. Continuing from the previous section, scroll to the top of the property profile page and click on the **Details** tab.



- The screen will reload to show the **Details** tab page. Scroll down the page and locate the **Unique Identifiers (ID)** section. Click on the **Edit** button found in the section.



The screenshot shows a card titled "Unique Identifiers (IDs)". Inside the card, it displays "Portfolio Manager ID: 6023547", "Custom IDs: 2 [view](#)", and "Standard IDs: 1 [view](#)". Below this is a tip icon and text: "You can select from Portfolio Manager's **Standard IDs** to provide information to others in data requests. Or you can create up to three **Custom IDs** so that you can cross reference your property in other systems." At the bottom right of the card is a blue "Edit" button, which is highlighted with a green border. A grey callout box with a green arrow pointing to the button contains the text: "In the **Unique Identifiers (IDs)** section, click on the **Edit** button".



The screenshot shows a form titled "Custom IDs". It includes the text: "You can add up to three" and "Only people who have". The form has three sections for "Custom ID 1:", "Custom ID 2:", and "Custom ID 3:". Each section has a "Name:" field and an "ID:" field. The "Custom ID 3" section is highlighted with a green border, and its "Name" field contains the text "Data Verification" and its "ID" field contains "Yes". A grey callout box with a green arrow pointing to the "Name" field of Custom ID 3 contains the text: "Enter the name for **Custom ID 3** exactly as shown here".

4. Properties with a gross floor area of 100,000 square feet or more are required to have their data verified. If the data has been verified, enter **“Yes”** in the **ID** field. If your property is not required to have its data verified and it has not been verified, enter **“No”** in the ID field.



The image shows a form titled "Custom ID 3:". It contains two input fields. The first field is labeled "Name:" and contains the text "Data Verification". The second field is labeled "ID:" and contains the text "Yes". The "ID:" field is highlighted with a green rectangular border. A green arrow points upwards from a text box below towards the "ID:" field.

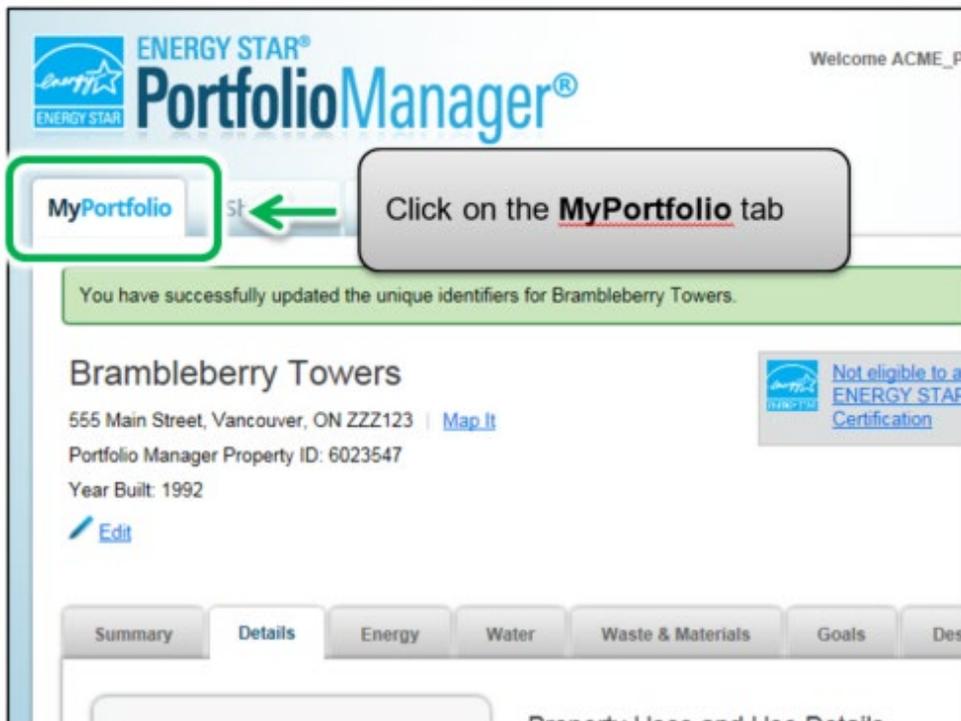
If required, enter **“Yes”** in the **ID** field after your data has been verified; otherwise enter **“No”**.

## 2.9 – Adding Another Property

You have now completed the process for adding a single property to Portfolio Manager.

**The following are the steps to add another property.**

1. At the top of the page, click on the **MyPortfolio** tab to view all of your properties.



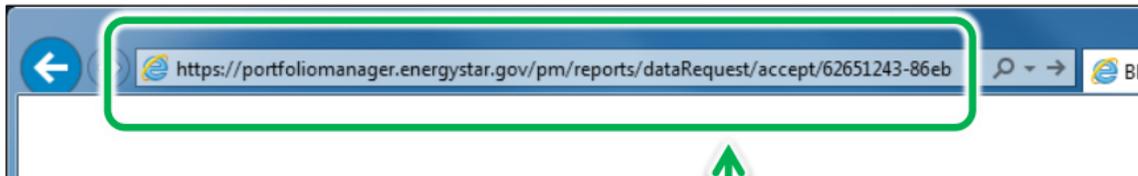
### 3 – Submitting Your Report

During the submission process, you will complete the submission for your portfolio of buildings that are required to report under the EWRB initiative. Once you have added all of your properties to Portfolio Manager, you can submit your report.

**The following are the steps to complete the submission process for your portfolio.**

1. Click on the Portfolio Manager EWRB 2018 submission link provided here: <https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/11eded63-4715-49ed-811a-7cd2ef7b2c9f>. Or, you can copy the link above and paste it into the address bar of your web browser.

The link in the box below is illustrative. When reporting, please copy and paste the correct link in the text, above.



Copy and Paste the link into your web browser's address bar

2. The link will open a **Data Request** page. In the **About Your Response** section, select who the data is being submitted on behalf of. Select “myself” unless you are submitting data on behalf of a client.

Respond to Data Request: EWRB Energy and Water Usage Data Request for 2016  
from Ontario Ministry of Energy (Ontario Ministry of Energy)

**About this Data Request**

Data Requested By: Ontario Ministry of Energy  
For help, contact: Ontario Ministry of Energy at [ewrbsupport@ontario.ca](mailto:ewrbsupport@ontario.ca) or 1-844-274-0689

**Responding to Data Requests**

You are viewing this screen because someone has asked you to provide them in the form of a data request. To respond, simply fill out the information on this screen and select what properties you wish to include (some decisions have been made by the data requestor).

Also see the [How to Respond to Requests](#) guide.

**About Your Response**

Who is this data being submitted on behalf of?

myself  
 someone else

Select who the data is being submitted for

**Submitting Data for Someone Else**

Some people delegate their responsibilities for responding to data requests to other people. If you are submitting data on behalf of someone else, you must provide their name from your account so that they will be able to view the response.

**Previewing Reports**

- a. **One Property** – You will be prompted to select a single property from your portfolio for the submission.
- b. **Multiple Properties** – You will be prompted to select a group of properties from your portfolio for the submission.

- c. **All Properties** – This option will include all properties from your portfolio for the submission.

The screenshot shows a web form titled "Your Response" with the heading "Select Information to Include:". Under "Timeframe:", there are three dropdown menus: "Single Year", "Dec 31", and "2016". Below this is an information icon and text: "If the data requestor has specified a timeframe for the request, you will not be able to change it." Under "Properties:", a dropdown menu is set to "All Properties". Below this is another information icon and text: "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." At the bottom right, there is a blue button labeled "Generate Response Preview" and a link labeled "Cancel". A grey callout box with rounded corners contains the text "Select the desired option" and has a green arrow pointing up to the "All Properties" dropdown menu.

This screenshot is identical to the one above, showing the "Your Response" form with "All Properties" selected. However, a grey callout box with rounded corners contains the text "Click on the **Generate Response Preview** button". A green arrow points down from this callout box to the "Generate Response Preview" button, which is also highlighted with a green rectangular border.

The Reporting tab will open with a status box explaining that your report is being generated.

A preview for your response to the data request "Data Request: EWRB 2016" on behalf of Ratheyan Aravind (TEST3) is being generated.

You may view your response preview by selecting "Preview Response" or "Download Preview in Excel" from the action menu below. Large responses may take a long time to prepare. After you have viewed your response, you must select "Send Response" in order for your data to be released.

Please note that each property you included should have a full 12 months of information for each timeframe. Otherwise, the metrics may not be able to be calculated. When this happens, "N/A" will be displayed in your response.

Templates & Reports (51) Create a New Template

| Name  | Status                      | Action       |
|---|-----------------------------|--------------|
| Nov 1 - EWRB Pilot Energy and Water Reporting and Benchmarking Request for 2016 (Request from Ontario Ministry of Energy) | Generating Response Preview | I want to... |
| Data Request: EWRB Energy and Water Data Request for 2016 - ...   | RESPONSE PREVIEW GENERATED  |              |

The **Status** field will indicate **Generating Response Preview**

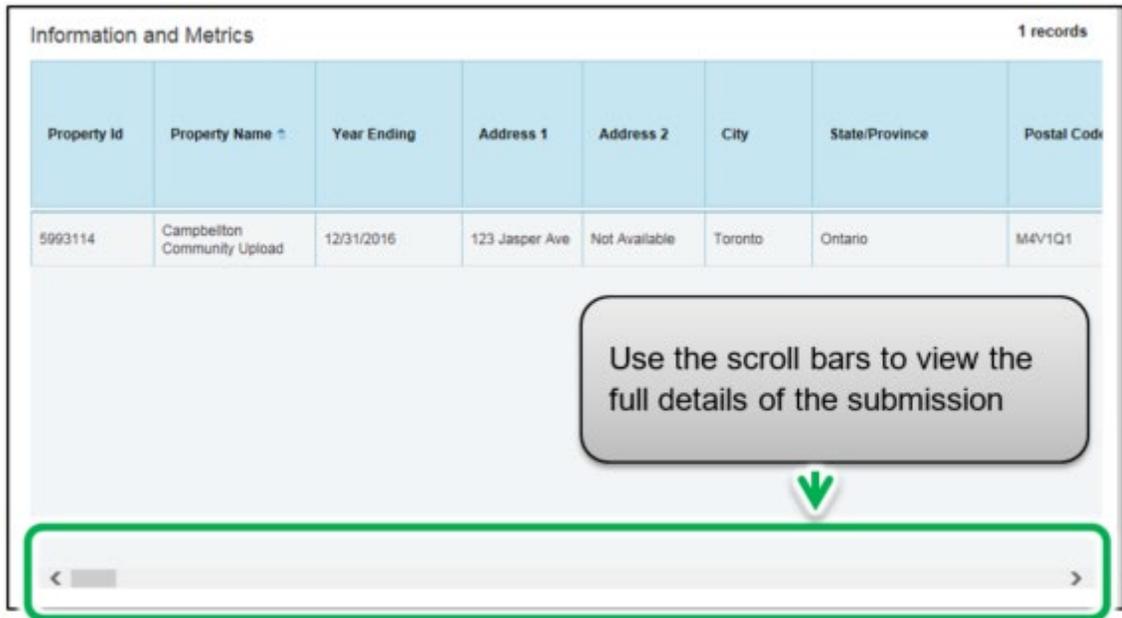
Your new response preview(s) has been generated.

| Name  | Status   | Action  |
|---|--|---|
| Data Request: EWRB 2016 (Request from Ontario Ministry of Energy) | Response Preview Generated: 2/13/2017 11:36 AM | I want to...<br>I want to<br>Preview Response<br>Generate an Updated Response<br>Send Response<br>Delete Response |

Select the **Preview Response** option to preview your submission

**NOTE:** You will know that all data has been recorded correctly once you see all data in the “Weather Normalized Site Electricity” and “Water Use (All Water Sources)” section, located near the bottom of the page.

7. The **Reporting** tab will reload to show the **View Report** page. The page will include the **Information and Metrics** table displaying the property data that will be included in your submission. Use the page scroll bars to view the full details of the property data that will be submitted to the Ministry of Energy.



The screenshot shows a table titled "Information and Metrics" with 1 record. The table has 8 columns: Property Id, Property Name, Year Ending, Address 1, Address 2, City, State/Province, and Postal Code. The data row contains: 5993114, Campbellton Community Upload, 12/31/2016, 123 Jasper Ave, Not Available, Toronto, Ontario, and M4V1Q1. A callout box with a downward arrow points to the scrollbar at the bottom of the table, which is highlighted with a green border. The callout box contains the text: "Use the scroll bars to view the full details of the submission".

| Property Id | Property Name                | Year Ending | Address 1      | Address 2     | City    | State/Province | Postal Code |
|-------------|------------------------------|-------------|----------------|---------------|---------|----------------|-------------|
| 5993114     | Campbellton Community Upload | 12/31/2016  | 123 Jasper Ave | Not Available | Toronto | Ontario        | M4V1Q1      |

8. At the bottom of the page, click on the **Close** link to proceed.



9. You will be returned to the Reporting tab. Scroll down to the **Templates & Reports** table and locate the generated data request. Select the **Send Response** option from the **Action** drop-down list to proceed to the next step.



**!** Important: In some cases, you may want to add or update information after you have already sent your submission to the Ministry of Energy (for example, if you realize that your information is incomplete, or something has changed since you submitted your information). To do this, first update only the property information you want to change. Then from the Reporting tab scroll down and locate the data request response you want to update. Select **Generate an Updated Response** from the Action drop-down list and proceed to the next step.

| Name  | Status   | Action   |
|---|--|--|
| EWRB Energy and Water Usage Data Request for 2016 (Request from Ontario Ministry of Energy) | Response Preview Generated: 11/21/2017 4:18 PM | <ul style="list-style-type: none"> <li>I want to...</li> <li>Edit Properties and Timeframe</li> <li>Preview Response</li> <li><b>Generate an Updated Response</b></li> <li>Send Response</li> <li>Update Response</li> </ul> |
| Performance Highlights  | No Report Generated                            |  |
| Energy Performance  | No Report Generated                            |  |

10. Once you have selected the **Send Response** option, you will be brought to a response confirmation page. Under section “1”, from the **Select contacts** list box, select the people from your contact book you wish to send a confirmation email to. In the **Additional Email Addresses** box, enter the email addresses of the people you wish to send a confirmation email to who are not listed in your contact book.

**Confirm Response to Data Request from Ontario Ministry of Energy)**

By clicking Send Data, you will release data to Ontario Ministry of Energy (Ontario Ministry of Energy). You will receive a copy of the data attached.

**1** Who (besides you) should we send a confirmation email to?

Select contacts from your contacts book:

Luc Besner (RRE\_Admin)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection.

Optional- Additional Email Addresses:

joe@gmail.com

Select the individuals from your contact book who you wish to send a confirmation email to

Enter the email addresses of the individuals who are not in your Portfolio Manager contact book

**2** What format would you like your data in for the email attachment?

Excel

XML

Select the **Excel** option

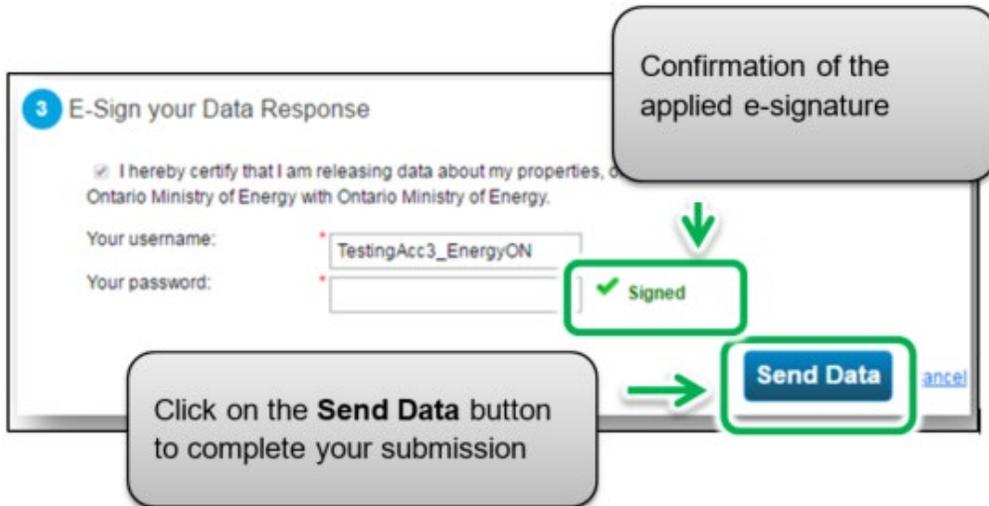
12. In section “3”, select the checkbox to confirm the release of your data to the Ministry of Energy. Enter your **Username** and **Password** and then click on the **E-Sign Response** button to give your consent.

The image shows a screenshot of a web form titled "3 E-Sign your Data Response". The form contains a checkbox with the text "I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Ontario Ministry of Energy with Ontario Ministry of Energy." Below this are two input fields labeled "Your username:" and "Your password:". To the right of the password field is a blue button labeled "E-Sign Response". At the bottom right of the form are two buttons: "Send Data" and "Cancel".

Two callout boxes provide instructions:

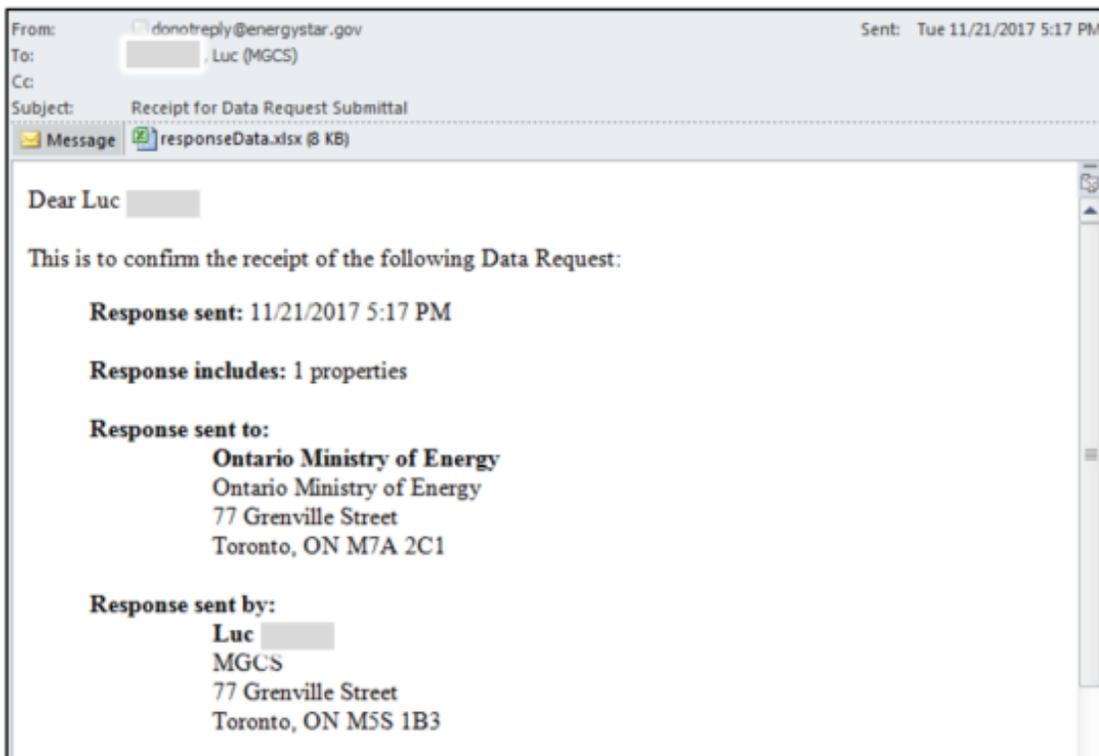
- A top callout box with a downward arrow pointing to the checkbox: "Select the checkbox to confirm the release of your data to the Ministry of Energy".
- A bottom callout box with an upward arrow pointing to the "E-Sign Response" button: "Enter your **Username** and **Password** and then click on the **E-Sign Response** button to give your consent".

13. If your entry is successful, the page will reload to show a green checkmark as a confirmation of your e-signature. Click on the **Send Data** button. When prompted to confirm, click on the **Continue** button.



Your response to the data request from Ontario Ministry of Energy has been successfully sent. You will receive a confirmation email with a receipt and a copy of the data attached shortly.

You will also receive an email confirmation shortly afterwards from Portfolio Manager.



- 1) Confirmation email from the Ministry of Energy
- 2) Confirmation email from Portfolio Manager

Congratulations, you have completed your requirement to report for the year.

## Definitions

**Energy Star Score** – The Energy Star Score helps building owners understand their energy consumption and how they are performing by comparing their usage to similar buildings nationwide. A score of 75 or higher indicates that your building is a top performer and your building may be eligible for Energy Star Certification. The [Energy Star](#) website provides more details on how Energy Star Scores are calculated.

**Energy Use Intensity (EUI)** – EUI describes a building's energy use as a function of its size or other characteristics. For property types in Portfolio Manager, EUI is expressed as energy per square foot per year. It's calculated by dividing the total energy consumed by the building in one year (measured in kBtu or GJ) by the total gross floor area of the building (measured in ft<sup>2</sup> or m<sup>2</sup>).

**EWRB** – Acronym for the Energy and Water Reporting and Benchmarking initiative for the Ministry of Energy. The EWRB initiative collects annual energy and water consumption information from the owners of Ontario properties with property types of 50,000 square feet or larger.

**EWRB Reporting Period** – EWRB Reporting Period refers to the yearly reporting period from January 1<sup>st</sup> to July 1<sup>st</sup> for the EWRB initiative. During the EWRB reporting period, Ontario Property Owners are required to submit their property's annual energy and water consumption information through Portfolio Manager.

**Portfolio Manager** – Portfolio Manager is a third-party application by Energy Star. It is the data entry and collection application for Ontario Property Owners to report their property's annual energy and water consumption information.