

EVERSOURCE ENERGY

Eversource Integration With Energy Star Portfolio Manager

Configuring Automatic Data Transfer for Your Energy
Benchmarking Needs

Updated March 29, 2017

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)

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>

The screenshot shows the 'Create an Account' page on the ENERGY STAR Portfolio Manager website. The page is divided into two main sections: 'Accessing Your Account' and 'About Yourself'. The 'Accessing Your Account' section includes fields for Username, Password, and Confirm Password. The Password field has a note: '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.).'. The 'About Yourself' section includes fields for First Name, Last Name, Job Title, Email, Confirm Email, Phone, Country (a dropdown menu with 'Select Country' selected), and Language (a dropdown menu with 'English' selected). At the bottom, there are radio buttons for 'Reporting Units': 'Conventional EPA Units (e.g., kBtu/ft²)' (selected) and 'Metric Units (e.g., GJ/m²)'. On the right side, there are two informational sections: 'Getting Started' and 'Accounts for Organizations'. The 'Getting Started' section includes a note: '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.' The 'Accounts for Organizations' section includes a note: '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'. At the top right, there are links for 'Help | Login' and 'Language: English | Français'. At the top left, there is the ENERGY STAR Portfolio Manager logo. At the top right, there is a link for 'Already have an account? Sign In Here'.

ENERGY STAR® Portfolio Manager®

Help | Login
Language: English | Français

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

Create an Account

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: *

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)

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.

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.

The screenshot shows the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo and the text 'ENERGY STAR® PortfolioManager®'. At the top right, it says 'Welcome ES_StateTest1: Account Settings | Contacts | Help | Sign Out'. Below the header are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main content area is divided into several sections:

- Properties (5)**: A box containing an 'Add a Property' button, which is circled in red.
- Notifications (0)**: A box stating 'You have no new notifications.'
- Source EUI Trend (kBtu/ft²)**: A line graph showing energy use intensity from 2006 to 2016. The y-axis ranges from 0 to 200. Data points are visible for 2013, 2014, and 2015, showing a slight increase.
- Properties (5)**: A list of properties with a search bar and an 'Add a Property' button. The list includes:
 - CT DAS/CT DEEP Mobile Enviro. Lab Bldg
 - CT Dept of Environmental Protection
 - CTDEEP Headquarters Building (Hartford)
- Total GHG Emissions Trend (Metric Tons CO2e)**: A section for tracking greenhouse gas emissions.

At the bottom, there is a pagination control showing 'Page 1 of 1' and 'View 1 - 3 of 3'.

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!"

The screenshot shows a web form titled "Your Property Type" with a logo for "ACME BANK" in the top left. The form is divided into three main sections: "Your Property Type", "Your Property's Buildings", and "Your Property's Construction Status".

- Section a:** "Your Property Type" section. It contains a text prompt: "We'll get into the details later. For now, overall, what main purpose does your property serve?". Below this is a dropdown menu with "K-12 School" selected. A link "Learn more about Property Types." is provided. A red box labeled "a" is positioned to the left of the dropdown.
- Section b:** "Your Property's Buildings" section. It contains a text prompt: "How many physical buildings do you consider part of your property?". Below this are three radio button options: "None: My property is part of a building", "One: My property is a single building", and "More than One: My property includes multiple buildings (Campus Guidance)". A text input field labeled "How many?" is also present. A red box labeled "b" is positioned to the left of the radio buttons.
- Section c:** "Your Property's Construction Status" section. It contains a text prompt: "Is your property already built or are you entering this property as a construction project that has not yet been completed?". Below this are three radio button options: "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.", and "Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training." A red box labeled "c" is positioned to the left of the radio buttons.
- Section d:** A blue "Get Started!" button is located at the bottom right of the form, with a "Cancel" link next to it. A red box labeled "d" is positioned below the button.

On the right side of the form, there are three "Tip" boxes and a "Test Properties" section, each with an information icon (i) and a title. The tips provide additional guidance on property setup and selection. The "Test Properties" section explains the purpose of adding test properties to the system.

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

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:

State/Province:

Postal Code:

[Year Built:](#)

Gross Floor Area: [Temporary Value](#)

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

Irrigated Area:

Tip
 The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

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

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

Name:	Test Building	Country:	US
Property Type:	Office	Address:	123 Main Street Hartford, CT 06101 Map It
Year Built:	1980		
Property consists of:	1 building		

Edit

Add Another Type of Use Add

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	* <input type="text" value="25,000"/> <input style="font-size: 0.8em; border: none; padding: 0 5px;" type="text" value="Sq. Ft."/>	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text" value="65"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text" value="20"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text" value="25"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1980"/>	<input type="checkbox"/>

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

Back
Add Property
Cancel

- 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!

MyPortfolio | Sharing | Reporting | Recognition

Congratulations! You have successfully created your property.

Next, you can:

- [Add energy use information](#), so that you can see your energy performance metrics.

Test Building
123 Main Street, Hartford, CT 06101 | [Map It](#)
Portfolio Manager Property ID: 5731444
Year Built: 1980
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/ft²) Why not score?
Current EUI: **N/A**
Baseline EUI: **N/A**

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

Notifications (0)
You have no new notifications.

Property Profile
You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager. You can create a profile for your property.

Metrics Summary

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A

Part 2 – Entering Meter Information

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

The screenshot displays the 'MyPortfolio' interface with several components:

- Navigation:** 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition' tabs.
- Properties (6):** A summary box with an 'Add a Property' button.
- Source EUI Trend (kBtu/ft²):** A line graph showing data points for the years 2013, 2014, and 2015, with values around 150.
- Notifications (5):** A blue bar with a 'View All' link.
- Properties (6) List:** A table with columns 'Name' and 'Action'. The 'Name' column is sorted ascending. The table contains four entries:

Name	Action
CT DAS/CT DEEP Mobile Enviro. Lab Bldg	I want to... ▼
CT Dept of Environmental Protection	I want to... ▼
CTDEEP Headquarters Building (Hartford)	I want to... ▼
Test Building	I want to... ▼
- Footer:** A pagination bar showing 'Page 1 of 1' and 'View 1 - 4 of 4'.

A red arrow points from the 'Source EUI Trend' graph area to the 'Test Building' entry in the properties list.

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

The screenshot displays the Eversource Energy property overview interface. At the top, a navigation bar contains tabs for Summary, Details, Energy, Water, Waste & Materials, Goals, and Design. The 'Energy' tab is highlighted with a red circle. Below the navigation bar, the main content area is divided into several sections. On the left, the 'Meter Summary' section indicates '0 Energy Meters Total' and provides instructions on how to receive metrics. It includes a link to 'Add A Meter' and a button labeled 'Enter Your Bills'. Below this is a section titled 'Four Ways to Enter Bill Data' with a list of four methods: 1. Manually, 2. Use our simple spreadsheet (one meter) to upload or Copy/Paste, 3. Use our complex spreadsheet (multiple meters + multiple properties), and 4. Find an organization to electronically enter your data into Portfolio Manager. On the right, the 'Meters - Used to Compute Metrics (0)' section features a 'View as a Diagram' link and a prominent 'Add A Meter' button, which is circled in red. Below this is a warning message stating that no energy meters are currently entered for the property and providing instructions on how to enter them, including a link to 'Enter information about your energy meters'. At the bottom of this section, there is a link to 'How to get Utility Data into Portfolio Manager'.

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.

Get Started Setting Up Meters for Test Building

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.

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)

Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

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Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More.](#)

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Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. [Learn more.](#)

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

About Your Meters for Test Building

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 name.

2 Energy Meters for Test Building (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
<input type="checkbox"/>	57xxxxxxxxx	Natural Gas		ccf (hundred cubic feet)	1/1/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	51xxxxxxxxx	Electric - Grid		kWh (thousand Watt-hours)	1/1/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>

[✖ Delete Selected Entries](#)
[+ Add Another Entry](#)

Required fields for data transfer:

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

Units – 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.

Date Meter became Active – 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.

Your Meter Entries for Test Building

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

2 Energy Meter(s) for Test Building

▼ 57xxxxxxxxx

Start Date	End Date	Usage ccf (hundred cubic feet)	Cost (\$)	Estimation
Click to add an entry				

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

Upload data in bulk for this meter:

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

No file chosen

▶ 51xxxxxxxxx

[Cancel](#)

**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.

Your meter entries have been added to your meters!

Select Energy Meters to Include in Metrics

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

Summary

2

Meters representing the total energy consumption for [Test Building](#) (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.](#)

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Energy Meters

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

<input type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	57xxxxxxxxx 25499822	Natural Gas
<input checked="" type="checkbox"/>	51xxxxxxxxx 25499823	Electric - Grid

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

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

Apply Selections [Cancel](#)

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

The screenshot shows the 'MyPortfolio' interface with a confirmation message at the top: "Congratulations! Any energy meters you selected have been successfully associated to your property(ies)." Below this, the 'Test Building' details are shown, including the address (123 Main Street, Hartford, CT 06101) and Portfolio Manager Property ID (5731444). A 'Weather-Normalized Source EUI (kBtu/ft²)' box shows 'Current EUI: N/A' and 'Baseline EUI: N/A'. The 'Energy' tab is selected, showing a 'Meter Summary' with 2 energy meters total and 2 used to compute metrics. A table lists the meters:

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
51xxxxxxxxx 25499823	Electric - Grid		Yes
57xxxxxxxxx 25499822	Natural Gas		Yes

Additional interface elements include 'Add A Meter' buttons, 'Enter Your Bills', and a 'Download Annual Totals by Meter' link.

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.

Welcome EE_CEC: [Account Settings](#) | **Contacts** | [Help](#) | [Sign Out](#)

MyPortfolio | [Sharing](#) | [Reporting](#) | [Recognition](#)

Properties (11)
[Add a Property](#)

Source EUI Trend (kBtu/ft²)

Name ↕	Action
EPA Sample K-12 School	I want to... ▼
EPA Sample Library	I want to... ▼
EPA Sample Office	I want to... ▼

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

The screenshot shows the 'My Contacts' page with a navigation bar at the top containing 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Below the navigation bar is a search bar with the text 'Search for new contacts'. The main content area has a heading 'My Contacts' and a descriptive paragraph: 'This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.'

Below the text is a toolbar with buttons: 'Share', 'Edit', 'Delete', 'Add Contact', and 'Add Organization'. The 'Add Contact' button is circled in red. Below the toolbar is a table with the following data:

	<input type="checkbox"/>	Name	Organization
All C E S	<input type="checkbox"/>	Eversource Clean Energy Communities (CTCleanCommunities) <small>Connected</small> EE	Eversource Energy
	<input type="checkbox"/>	Eversource Utility	Eversource
	<input type="checkbox"/>	syed sadath (syedsadath28@gmail.com) <small>Connected</small> Software Engineer	Test

At the bottom of the table area, there is another toolbar with buttons: 'Share', 'Edit', 'Delete', 'Add Contact', and 'Add Organization'.

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

Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account. If you find the person, send a Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact you would like to add does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:

Organization:

Username:

Email:

Connecting with Other Users

If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily [share your property](#) information with your contacts.

Keeping Personal Contacts

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

Organizing Personal Contacts by Organization

Click "Connect" only on the account "Eversource Web Services"

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

Eversource Web Services IT Consultant with Eversource	<input type="button" value="Connect"/>
[Redacted] Benchmarking intern with Eversource	<input type="button" value="Connect"/>
[Redacted] EEC with Eversource	<input type="button" value="Connect"/>
[Redacted] Analyst with ICF International	<input type="button" value="Connect"/>
[Redacted] Energy Efficiency Consultant with Eversource Energy	<input type="button" value="Connect"/>

Page 1 of 1 | 50 | 1 - 5 of 5

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 : * Example: 1
Enter 1 if you are owner, 2 if you are agent of an owner; 1 - 1 Characters

Your Name : * Example: John Mathew
Length: 1 - 50 Characters

Billing account # : * Example: 51123123456
Length: 8 - 11 Characters

Bill Start Date : * Example: 20160121
Enter the date Format as YYYYMMDD; 8 - 8 Characters

Bill End Date : * Example: 20160121
Enter the date Format as YYYYMMDD; 8 - 8 Characters

Individual Month Energy Usage Amount on Bill (kWh or CCF) : * Example: 73.32
Length: 1 - 15 Characters

Email : * Example: John@abc.com
Length: 1 - 50 Characters

Phone # : * Example: 781-321-0000
Length: 1 - 20 Characters

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"

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top left is the ENERGY STAR logo and the text "ENERGY STAR® PortfolioManager®". At the top right, it says "Welcome ES_StateTest1: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)". Below the header are four tabs: "MyPortfolio", "Sharing" (which is selected), "Reporting", and "Recognition".

Under the "Sharing" tab, there are three main sections:

- My Shared Properties (0)**: A box containing three buttons: "Share (or Edit Access to) a Property", "Set Up Web Services/Data Exchange" (circled in red), and "Download Sharing Report".
- Sharing Notifications (0)**: A box stating "You have no new notifications."
- More About Sharing**: A box with an information icon and text: "No properties are currently shared between you and [your contacts](#). Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)"

At the bottom of the page, there is a "Follow Us" section with icons for Twitter, Facebook, YouTube, and LinkedIn. To the right are links for "Contact Us", "Privacy Policy", "Browser Requirements", and "ENERGY STAR Buildings & Plants Website".

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"

MyPortfolio | **Sharing** | Reporting | Recognition

Share Properties for Exchanging Data

Choose Permissions | Set Up Connections | Check Existing Permissions | View Results/Confirmation

Sometimes it's really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

1 Select Web Services Provider (Account)
Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.
Select web services provider from my contacts book:
Eversource Web Services (Eversource)

2 Select Properties
Which Properties do you want to share? Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.
One Property | CT Dept of Environmental Protection

3 Choose Permissions
If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- I want to set permission levels in bulk for all selected properties and meters.
- I want to provide different levels of access for each property or to each individual meter within a property.

Set Permissions | Cancel


Info: Unlike "regular sharing," when you "bulk share" with a Web Service Provider, you can only pick one provider. This is because the bulk share depends on the requirements/settings of the provider.

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.

MyPortfolio
Sharing
Reporting
Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.



Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

NEW Who gets to **Share Forward**?

Full Access - Automatically includes "Share Forward" rights

Read Only - Automatically does NOT include "Share Forward" rights

Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Exchange Data - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Sort by: Property Name ▾

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▾ CT Dept of Environmental Protection (5047366)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Eversource Web Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Share Property(ies)
Cancel

- 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	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
▼ All Meter Information						
▼ Energy Meters						
51-114803026	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Y <input type="text"/>	BA <input type="text"/>	51997833074
57-374040079	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Y <input type="text"/>	BA <input type="text"/>	51997833074
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Y <input type="text"/>	BA <input type="text"/>	3028977056

¹ Is Eversource your service provider? Y: 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.

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
	<input checked="" type="radio"/> a	<input type="text"/> b	<input type="text"/> c	<input type="text"/> d	<input type="text"/> e
	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="51997833074"/>	<input type="text" value="N"/>
	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="51997833074"/>	<input type="text" value="N"/>
	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="3028977056"/>	<input type="text" value="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:

- o For the history load input, Eversource provides data back to 1/1/2013 before transmitting monthly data going forward
- o 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
- o Incremental data transfer will occur after the billing postdate of that account or meter
- o 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

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.

Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="Y"/>	<input type="text" value="BA"/>	<input type="text" value="3028977056"/>
▼ Water Meters						
Potable: Mixed Indoor/Outdoor Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="n"/>	<input type="text" value="NA"/>	<input type="text" value="NA"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
Recognition	<input type="radio"/>		<input checked="" type="radio"/>			

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

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.

Select Access Permissions to CT Dept of Environmental Protection for Eversource Web Services.

Checklists

Item	Yes	No
Recognition	<input type="radio"/>	<input type="radio"/>

1 Is Eversource your service provider? Y/N: Example: Y; Enter Y if Eversource is your service provider or N if not
2 ID: Example: BA; Enter "BA" for Billing Account # or "SA" for Service Account # or "MN" for Meter #
3 Description: Example: 12345678901, 12345678902; Enter complete Billing Account #, Service Account #, or Meter #. For Multiple BA, SA, MN, Please enter with delimiter comma (,).
4 Usage History Load Required? Y/N: Example: Y; Enter 'Y' if you want Eversource to send Usage History Data to ESPM (Starting from Jan 2013) or 'N' for Not Transferring usage history data

Additional Options:

Item	Yes	No
* Share Forward Allow Eversource Web Services to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input checked="" type="radio"/>	<input type="radio"/>

Apply Selections & Authorize Exchange Cancel

Click "Apply Selections & Authorize Exchange"

- 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.

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

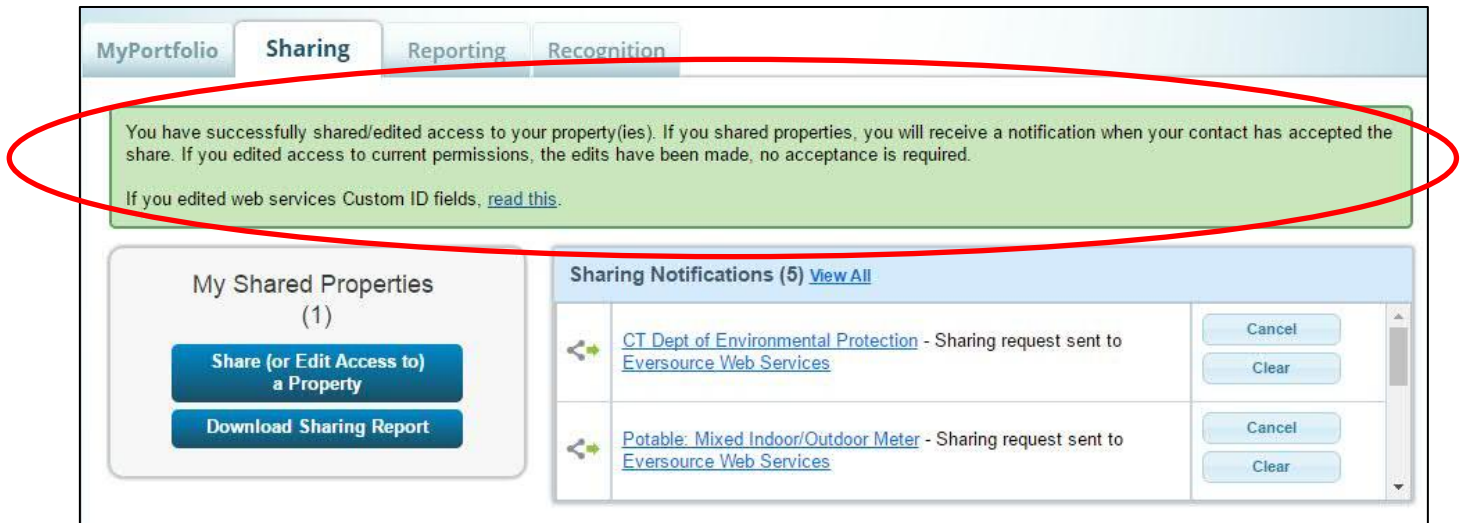
Sort by:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
CT Dept of Environmental Protection (5047366)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Eversource Web Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Share Property(ies) [Cancel](#)

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.