National Grid Benchmarking Portal: User's Guide to Uploading Aggregate Usage Data

To promote energy efficiency and help identify energy efficiency improvement opportunities for our customers, National Grid is working with the United States **Environmental Protection Agency ("EPA")** to make it easier for our customers to use the U.S. EPA's ENERGY STAR® Portfolio Manager® benchmarking tool.

Portfolio Manager is an interactive, web-based energy management tool that enables building owners and property managers to track and assess energy and water consumption across an entire portfolio of buildings. Portfolio Manager also lets customers estimate their carbon footprint, assess energy management goals over time, and identify strategic opportunities for savings.

National Grid has leveraged EPA's Portfolio Manager web services to facilitate the transfer of aggregated whole-building energy consumption data directly into customers' building records in Portfolio Manager.

This document outlines the steps that customers need to complete on the National Grid benchmarking portal to request aggregate energy usage data and upload building aggregate property usage data to EPA's Portfolio Manager account.

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- Creating an ENERGY STAR® Portfolio Manager Account

EPA ENERGY STAR Portfolio Manager Site

Step 1:

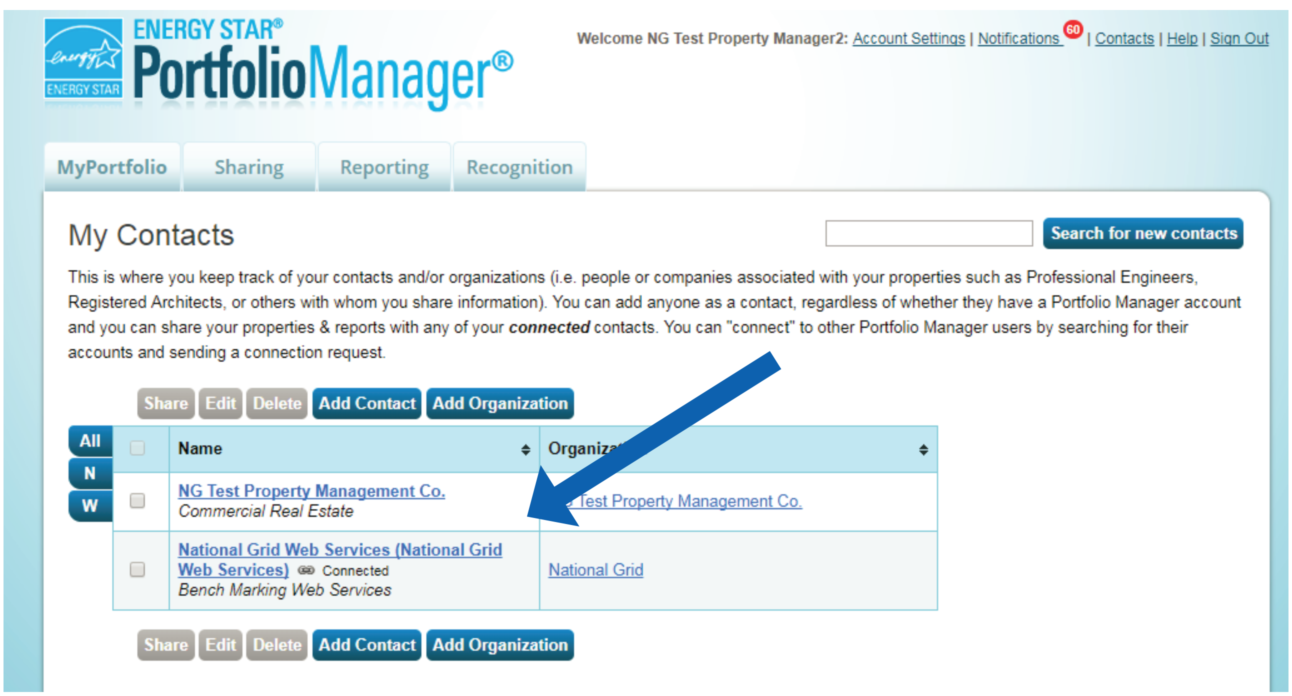
The data sharing process begins when a building owner, property manager or consultant first:

- Creates an account in the EPA's ENERGY STAR Portfolio Manager site:
  See the Appendix section for step-by-step directions
- After you have created an account in EPM you need to submit web service connection request by selecting "National Grid Web Services"
  - o Allow up to 24 hours for National Grid Web Services to accept your connection request

How to connect your Portfolio Manager account to National Grid, and share your Property with National Grid

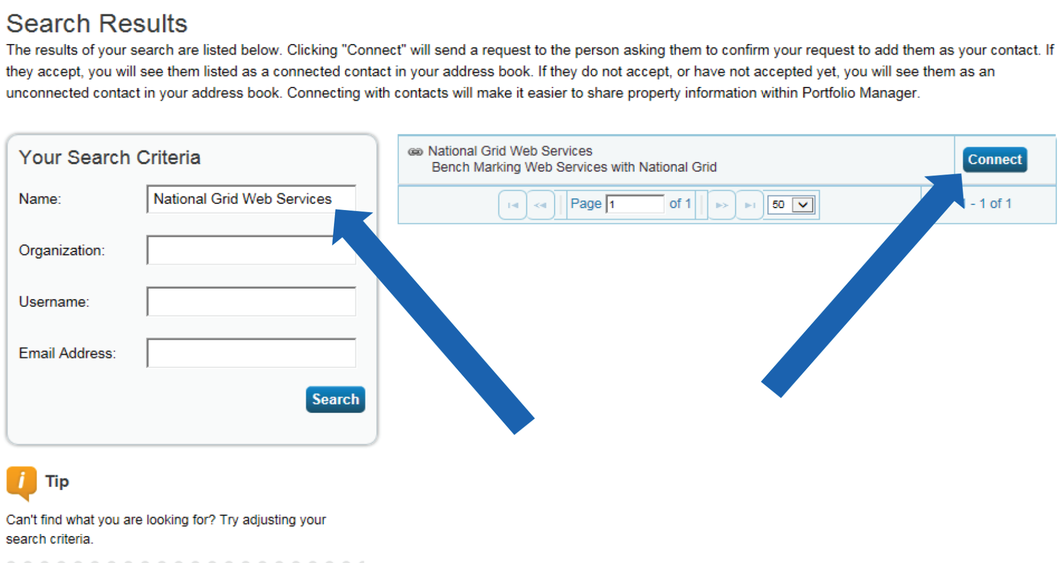
A. Connect with National Grid.

1. Check if National Grid is already a contact.
   - Click on Contacts in the upper right corner of the MyPortfolio page. On the My Contacts page, check if National Grid Web Services is listed as Connected.

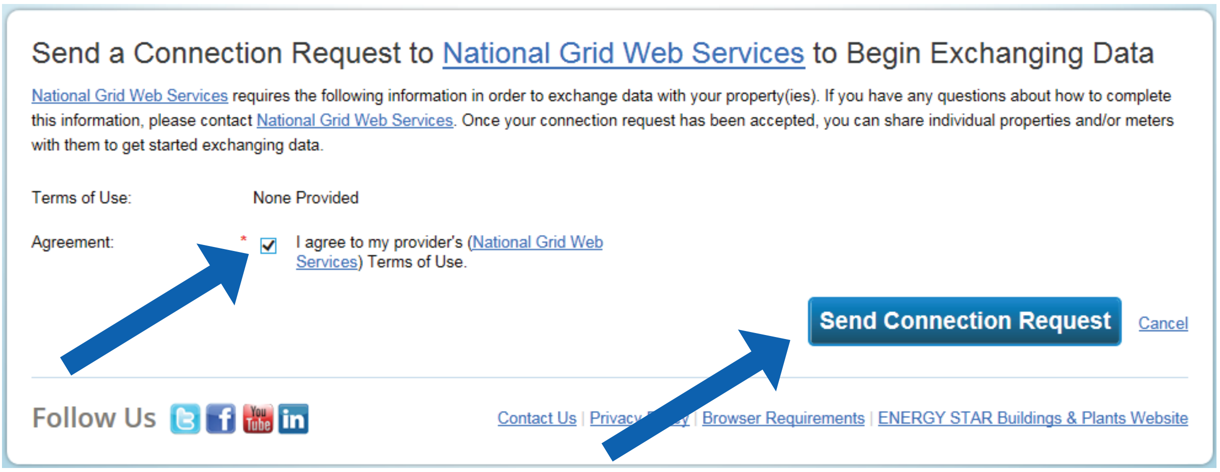


2. If National Grid is connected, go to Step B on page 4. If not:

    - Click Add Contact.
    - To search for National Grid, enter
        - Name: National Grid Web Services
    - Click Search.
    - From the list, locate “National Grid Web Services.”
    - Click Connect.



- After clicking "Connect," you will be prompted to accept National Grid's Terms of Use. Check the box next to "I agree" and then click "Send Connection Request." This will send your connection request to National Grid. When National Grid accepts your connection request, you will receive a notification in your Portfolio Manager account. At this point, you will be able to move on to the next step, sharing your property with National Grid.

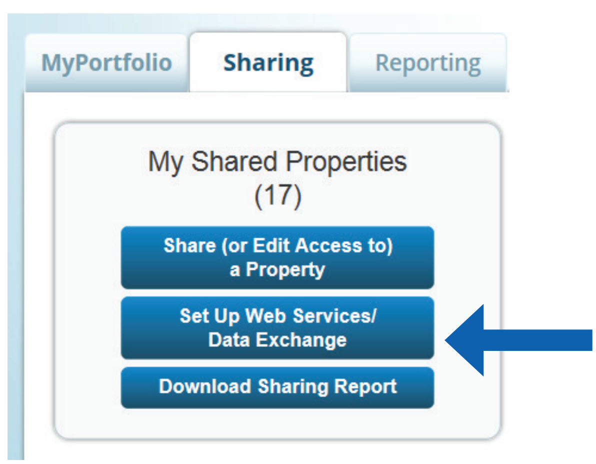


B. Share the Property

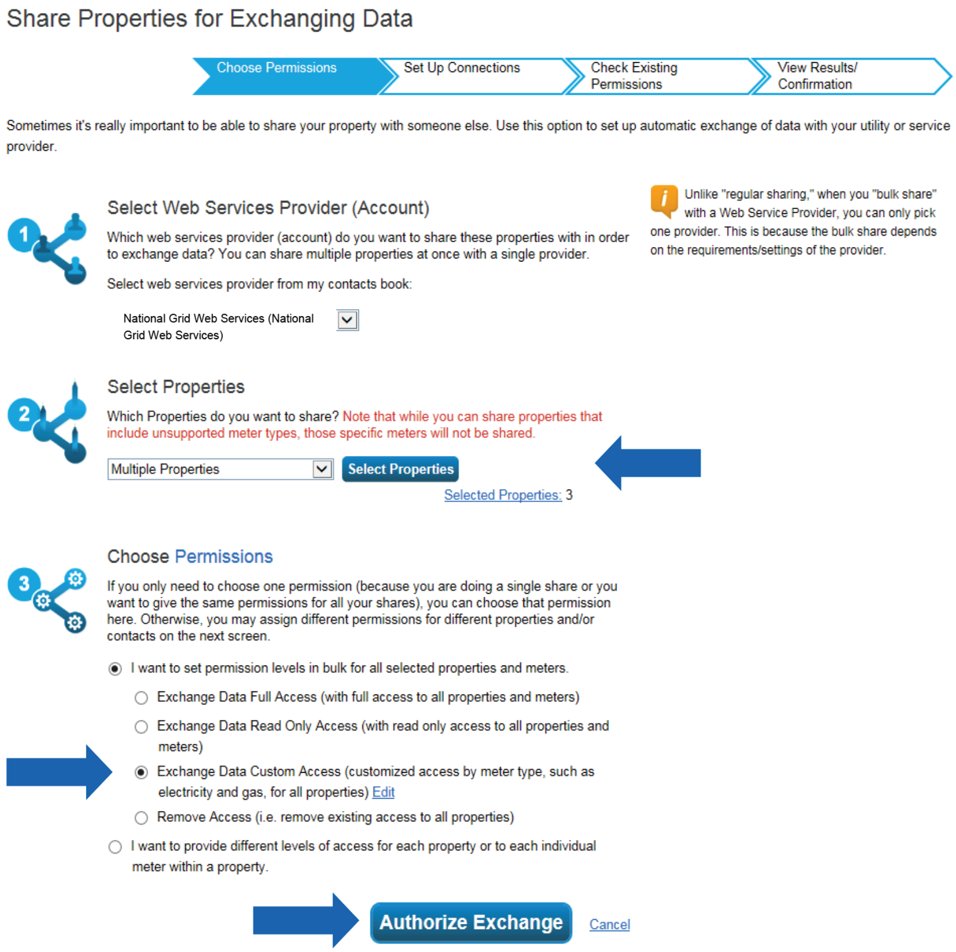
Please follow these steps. If you have previously shared with another National Grid Portfolio Manager account, you still need to connect and share with this account ("National Grid Web Services") in order to have National Grid send you your energy data automatically.

1. Click on the Sharing tab.

2. Click on "Set Up Web Services/Data Exchange."



3. On the “Share Properties for Exchanging Data” page, go to “Select Web Services Provider (Account),” and choose “National Grid Web Services” from the drop-down list.



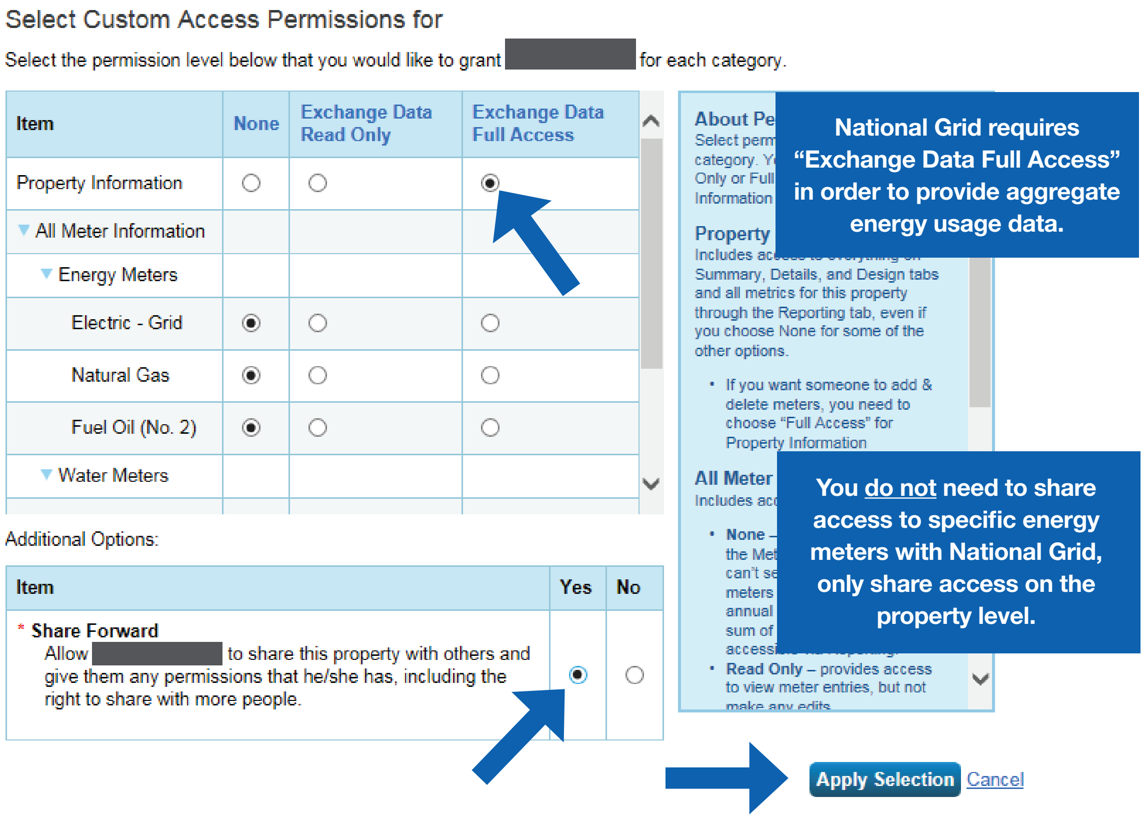
4. Go to “Select Properties,” and use the drop-down menu to indicate whether you wish to share one property, multiple properties, or all properties with National Grid.

- If you need National Grid data for just one property, select “One Property” from the drop-down list. You will then be presented with a second drop-down list from which you can select the property to share.

- If you need National Grid data for more than one property, choose “Multiple Properties” from the drop-down list. From there, click the button that says “Select Properties,” and a new window will pop up with a prompt. Check the boxes next to the property names you wish to share, click “Apply Selection,” and you will be taken back to the “Share Properties for Exchanging Data” page. Make sure that the correct number of “Selected Properties” is showing.

5. Go to “Choose Permissions” and select the first option, “I want to set permission levels in bulk for all selected properties and meters.”

- From the list of options that appears, select “Exchange Data Custom Access." This launches a new window, where you can set the Access Permissions that will apply to all properties that you are sharing with National Grid.



Make the following selections:

- o Property Information: select “Exchange Data Full Access.”
- o Meter Information:
  - ▪ For each meter displayed, choose “None'” – even if existing National Grid meters are listed.
    - **You do not need to share access to specific energy meters with National Grid.** After you have successfully shared your property, National Grid will create one or more new “virtual” meters, into which your aggregate energy consumption data will be uploaded.
    - If you do select “Read Only” or “Full Access” at the meter level, this will be ignored by National Grid, and may even be rejected, since meter-level shared access is not needed by National Grid’s system. As long as you have provided “Full” access at the property level, then this will be sufficient.

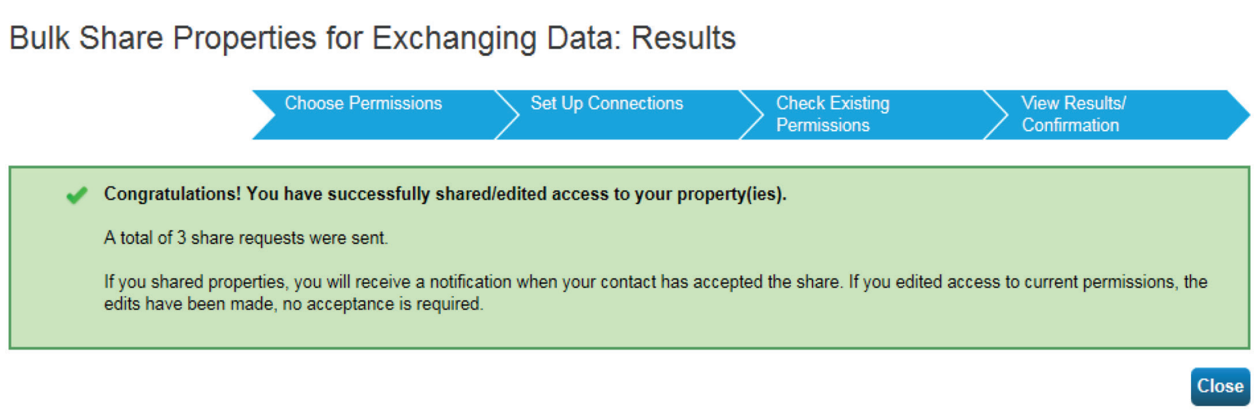
- ✓ **Water Meters:** select “None.”
- ✓ **Goals, Improvements, & Checklists:** select “None.”
- ✓ **Recognition:** select “None.”
- ✓ **Share Forward:** select “Yes.”

  - Click “Apply Selection,” which will return you to the “Share Properties for Exchanging Data” page.

6. From the “Share Properties for Exchanging Data” page, review your selections and then click “Authorize Exchange.”

7. If there are any issues with your sharing request (e.g., you attempted to share a property for which you do not have the necessary access rights), Portfolio Manager will alert you and prompt you to make corrections. Otherwise, you will see a confirmation page that says, “Bulk Share Properties for Exchanging Data: Results.” You will also see confirmation of the outgoing shares in the “Sharing Notifications” box on the “Sharing” tab of your Portfolio Manager account.

First-Time Share Request: Please allow National Grid up to 24 hours to validate and accept the initial share request.



Resharing EPM Property Share (Returning Customers)

1. If you have received the most recent years' data upload from National Grid, you should not unshare your property or meter(s) with National Grid. Leave these shares in place and the next data upload should be pushed through automatically.

2. If you do mistakenly deactivate your National Grid's shared access to the property, that will also disable National Grid access to the gas meters that we have been populating with usage data. In this case, you will need to reshare not just the property at "Full Access," but also the meters named "Natural Gas Main Meter" and "Gas Cooking Meter" (if applicable).

3. After you have reshared your property you will need to contact National Grid Benchmarking Portal Call Center at the email or phone number below to validate that the re-share has been accepted before filling out a New National Grid webform (www.ngrid.com/epm) to restart usage data upload process again.

Email National Grid if you have any questions or issues with your submissions:

NYC, LI and Upstate NY Customers – **energyefficiency@nationalgrid.com**
MA and RI Customers – **NE.energyefficiency@nationalgrid.com**

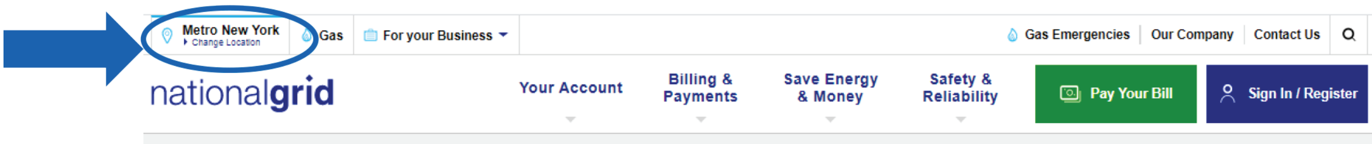
Or call **855-563-7448**, 8:00 am to 5:00 pm EST Monday through Friday

How to Register on the National Grid Web Site

Once you have completed your share request process in EPA ENERGY STAR Portfolio Manager, visit the National Grid Benchmarking Portal to submit data share webform.

Note: First-time users submitting a web share request could take up to 24 hours to get accepted by National Grid.

Before beginning the registration process, check the region to verify that you are in the correct region. You can always use the “Change Location” link on the top of the page to change your region.



Examples: NYC customers requesting aggregate data must select “Metro” as their region. Customers in Far Rockaway and Long Island must select “Long Island” region.

NY Metro and Long Island Customers

Once you have completed Step 1, select the “EPA Portfolio Manager Online Form” link in Step 2:

Step 1: Start the aggregate data upload process by registering your property through the **EPA Portfolio Manager site**. You must register and complete the PROPERTY SHARE procedure (if you haven’t done so already).

Step 2: Once you have completed the PROPERTY SHARE procedure with the EPA Portfolio Manager, click on the link for the **EPA Portfolio Manager Online Form** to complete the online registration process with National Grid.

Email National Grid if you have any questions or issues with your submissions:

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MA, RI and UNY Customers

In MA, RI and UNY service regions, National Grid has a two-tier process.

- **Tier One** - Properties with THREE (3) or fewer active accounts per commodity (electric and/or gas) are required to submit the Energy Usage Release Form for each tenant.

  Example: If a building has two (2) gas and four (4) electric active accounts, then the building owner is required to obtain a signed Energy Usage Release Form for the two (2) gas accounts. The four 4 active electric accounts would follow the Tier Two process.

- **Tier Two** - Properties with FOUR (4) or more active accounts per commodity (electric and/or gas).

Please select the Tier below that applies to your building(s) and follow the steps accordingly.

Tier One – Building with three (3) or fewer active accounts

All buildings that have three (3) or fewer active accounts per commodity (electric and/or gas) are required to submit the Energy Usage Release Form for each tenant.

Step 1: Start the aggregate data upload process by registering your property through the EPA Portfolio Manager site. You must register and complete the PROPERTY SHARE procedure (if you haven't done so already).

Step 2: You must print, fill out and submit the Energy Usage Release Form for each tenant.
Email the fully completed forms in PDF format to:

- (MA and RI Customers) **NE.energyefficiency@nationalgrid.com**
- (Upstate NY Customers) **energyefficiency@nationalgrid.com**

Step 3: Once you have completed the PROPERTY SHARE procedure with the EPA Portfolio Manager site, click on the link for the EPA Portfolio Manager Online Form to complete the online register process with National Grid.

NOTE: Municipalities or governmental agencies with multiple properties that they would like data for can submit via email a signed Energy Usage Release Form with an Excel or Word file that lists all the managed buildings with their corresponding National Grid account information. Only one (1) account number per building is required.

Tier 2 - All buildings with four (4) or more accounts

All buildings with four (4) or more accounts per service type (electric and/or gas).

Step 1: Start the aggregate data upload process by registering your property through the **EPA Portfolio Manager site**. You must register and complete the PROPERTY SHARE procedure (if you haven't done so already).

Step 2: Once you have completed the PROPERTY SHARE procedure with the EPA portfolio manager, click on the link for the **EPA Portfolio Manager Online Form** to complete the online registration process with National Grid.

Important Information

National Grid has implemented a quarterly aggregate data upload process that will continue to provide customers with quarterly building usage information for up to four (4) years, as long as building owners maintain their EPA Portfolio Manager web share link as active.

- Deactivating the EPA portfolio manager property share link will disable the upload process.

If you require additional historical usage information, see "Additional Historical Usage Data Upload Option" section.

Email National Grid if you have any questions or issues with your submissions:

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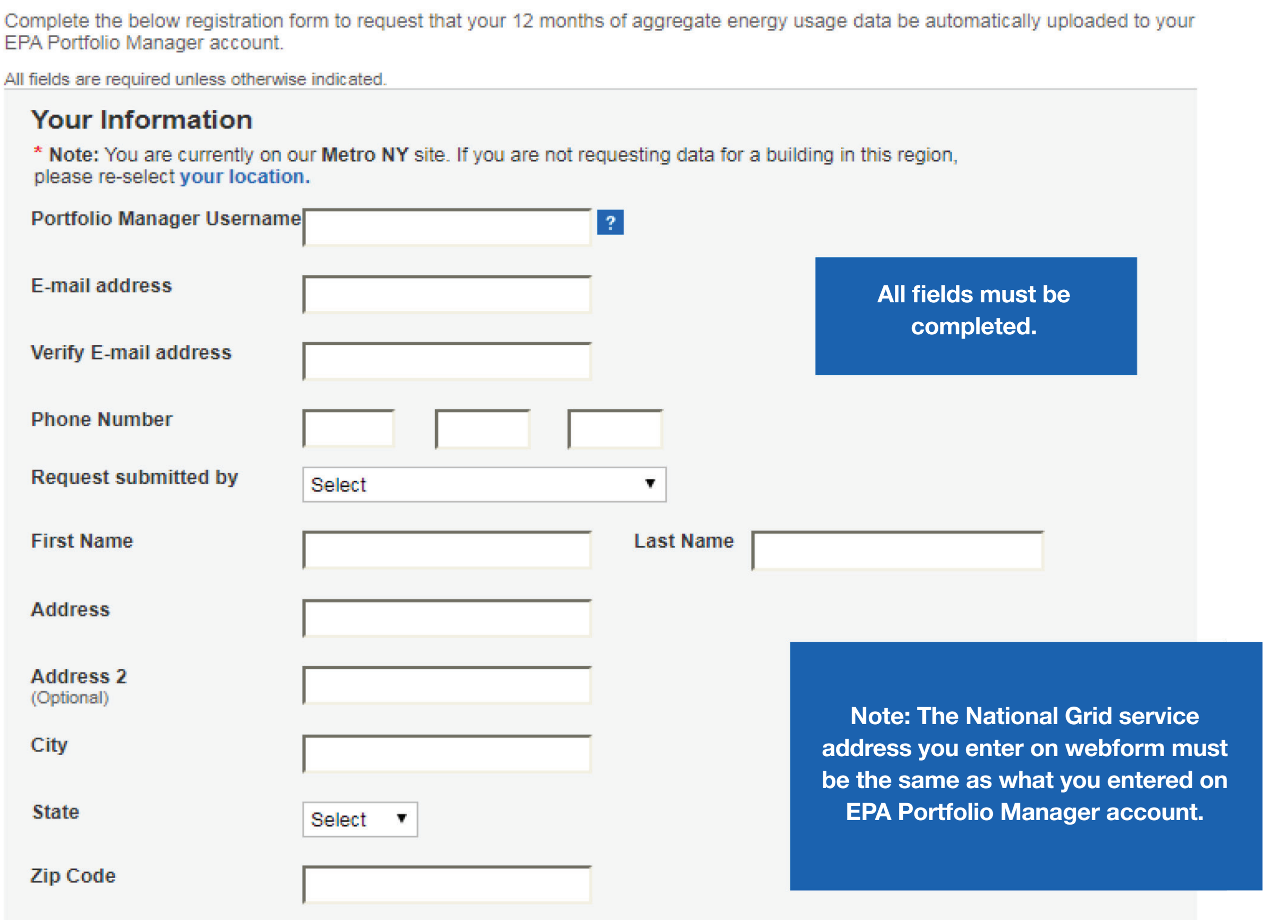
MA and RI Customers – **NE.energyefficiency@nationalgrid.com**

Or call **855-563-7448**, 8:00 am to 5:00 pm EST Monday through Friday

National Grid EPA Portfolio Manager Online Form

To complete the National Grid online EPA Portfolio Manager Web Form, enter your portfolio manager property ID, username, your email address, your contact information, service address and other required information.


Complete the below registration form to request that your 12 months of aggregate energy usage data be automatically uploaded to your EPA Portfolio Manager account.

All fields are required unless otherwise indicated.

Your Information

* **Note:** You are currently on our **Metro NY** site. If you are not requesting data for a building in this region, please re-select **your location.**

Portfolio Manager Username ?

E-mail address

Verify E-mail address

Phone Number

Request submitted by: Select

First Name

Last Name

Address

Address 2 (Optional)

City

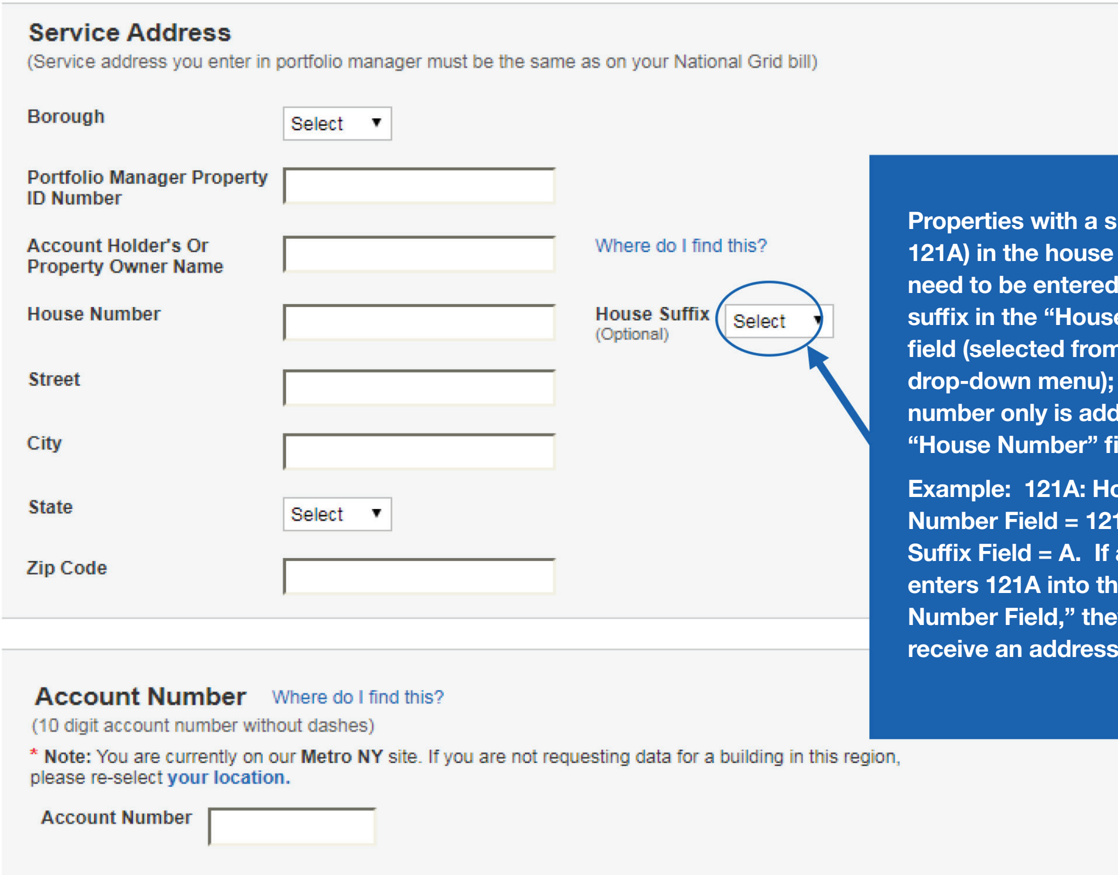
State: Select

Zip Code

All fields must be completed.

Note: The National Grid service address you enter on webform must be the same as what you entered on EPA Portfolio Manager account.

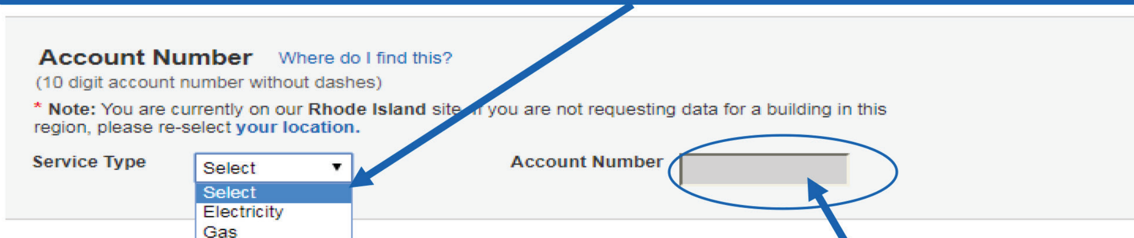
2A. Enter the property service address as found on your National Grid utility bill.



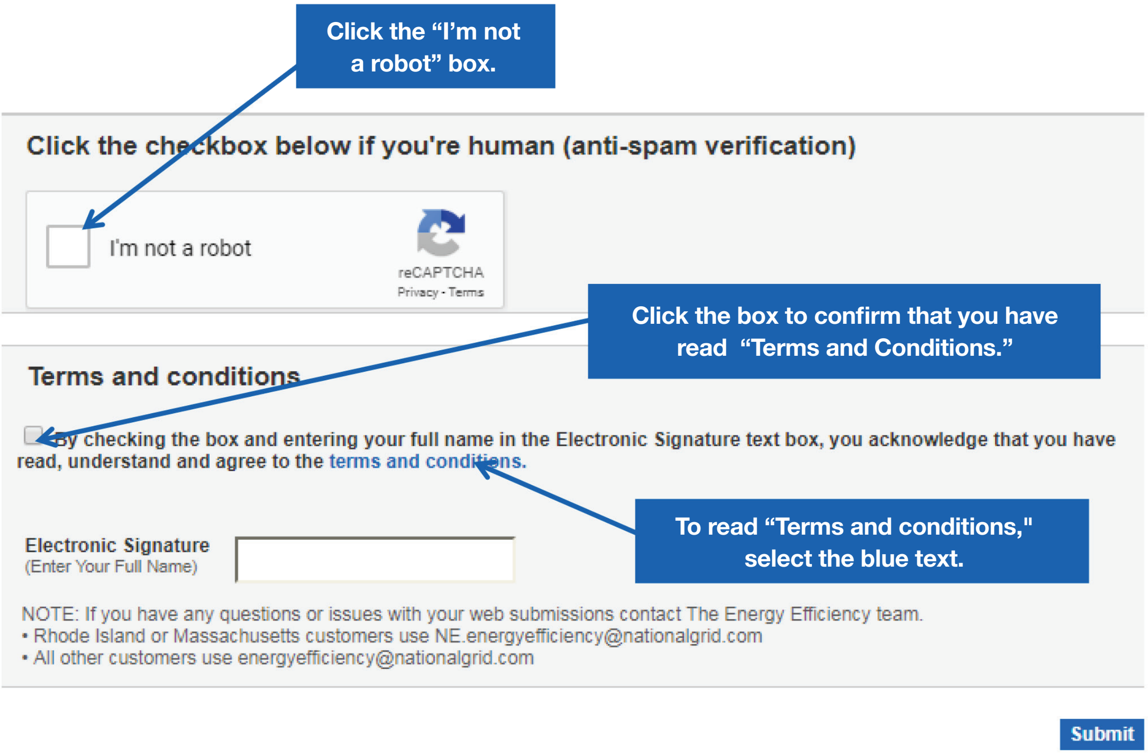
Properties with a suffix (e.g., 121A) in the house number need to be entered with the suffix in the "House Suffix" field (selected from the drop-down menu); the house number only is added in the "House Number" field.

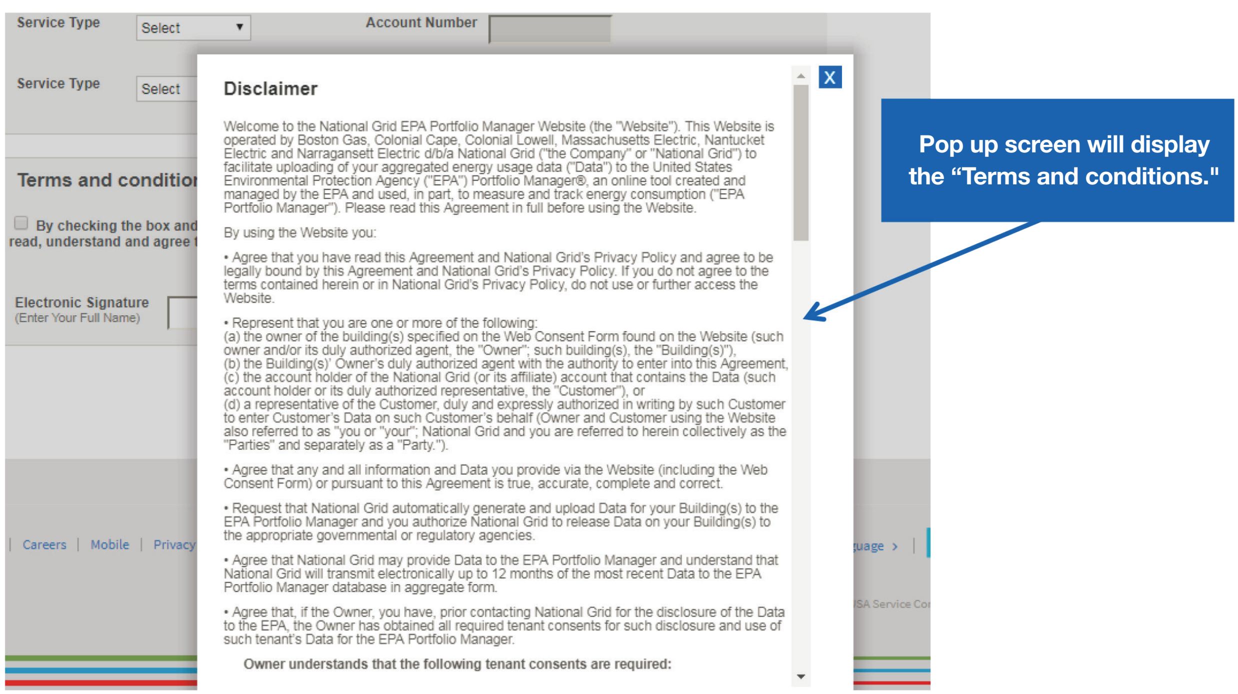
Example: 121A: House Number Field = 121 and House Suffix Field = A. If a customer enters 121A into the "House Number Field," they will receive an address error.

UNY, MA & RI regions only: customers are required to select a commodity type (Gas, Electric or both). NY Metro and LI will not have a drop-down menu option; only gas usage will be provided. Note: The "Service Type" drop-down menu option will vary by state.

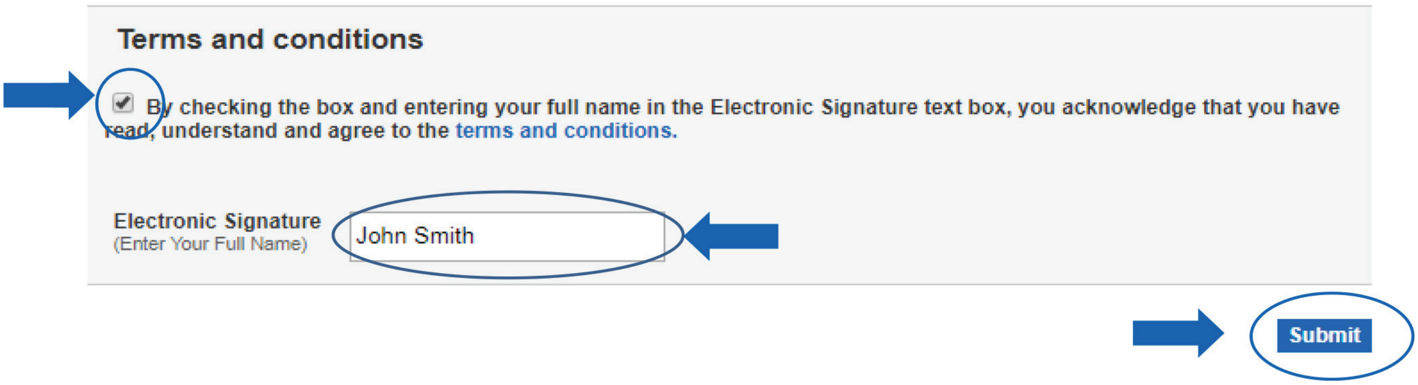


Account number must be the same as it appears on your bill.


Click the "I'm not a robot" box.
Click the checkbox below if you're human (anti-spam verification)
I'm not a robot
reCAPTCHA
Privacy - Terms
Click the box to confirm that you have read "Terms and Conditions."
Terms and conditions
By checking the box and entering your full name in the Electronic Signature text box, you acknowledge that you have read, understand and agree to the terms and conditions.
To read "Terms and conditions," select the blue text.
Electronic Signature
(Enter Your Full Name)
NOTE: If you have any questions or issues with your web submissions contact The Energy Efficiency team.
• Rhode Island or Massachusetts customers use NE.energyefficiency@nationalgrid.com
• All other customers use energyefficiency@nationalgrid.com
Submit


Service Type
Select
Account Number
Terms and conditions
Electronic Signature
(Enter Your Full Name)
Careers | Mobile | Privacy
Disclaimer
Welcome to the National Grid EPA Portfolio Manager Website (the "Website"). This Website is operated by Boston Gas, Colonial Cape, Colonial Lowell, Massachusetts Electric, Nantucket Electric and Narragansett Electric d/b/a National Grid ("the Company" or "National Grid") to facilitate uploading of your aggregated energy usage data ("Data") to the United States Environmental Protection Agency ("EPA") Portfolio Manager®, an online tool created and managed by the EPA and used, in part, to measure and track energy consumption ("EPA Portfolio Manager"). Please read this Agreement in full before using the Website.
By using the Website you:
• Agree that you have read this Agreement and National Grid's Privacy Policy and agree to be legally bound by this Agreement and National Grid's Privacy Policy. If you do not agree to the terms contained herein or in National Grid's Privacy Policy, do not use or further access the Website.
• Represent that you are one or more of the following:
(a) the owner of the building(s) specified on the Web Consent Form found on the Website (such owner and/or its duly authorized agent, the "Owner"; such building(s), the "Building(s)"),
(b) the Building(s)' Owner's duly authorized agent with the authority to enter into this Agreement,
(c) the account holder of the National Grid (or its affiliate) account that contains the Data (such account holder or its duly authorized representative, the "Customer"), or
(d) a representative of the Customer, duly and expressly authorized in writing by such Customer to enter Customer's Data on such Customer's behalf (Owner and Customer using the Website also referred to as "you or "your"; National Grid and you are referred to herein collectively as the "Parties" and separately as a "Party.").
• Agree that any and all information and Data you provide via the Website (including the Web Consent Form) or pursuant to this Agreement is true, accurate, complete and correct.
• Request that National Grid automatically generate and upload Data for your Building(s) to the EPA Portfolio Manager and you authorize National Grid to release Data on your Building(s) to the appropriate governmental or regulatory agencies.
• Agree that National Grid may provide Data to the EPA Portfolio Manager and understand that National Grid will transmit electronically up to 12 months of the most recent Data to the EPA Portfolio Manager database in aggregate form.
• Agree that, if the Owner, you have, prior contacting National Grid for the disclosure of the Data to the EPA, the Owner has obtained all required tenant consents for such disclosure and use of such tenant's Data for the EPA Portfolio Manager.
Owner understands that the following tenant consents are required:
Pop up screen will display the "Terms and conditions."

After reading the “Terms and conditions”, check the “Terms and conditions” box, type in your full name and click Submit.



Email National Grid if you have any questions or issues with your submissions:

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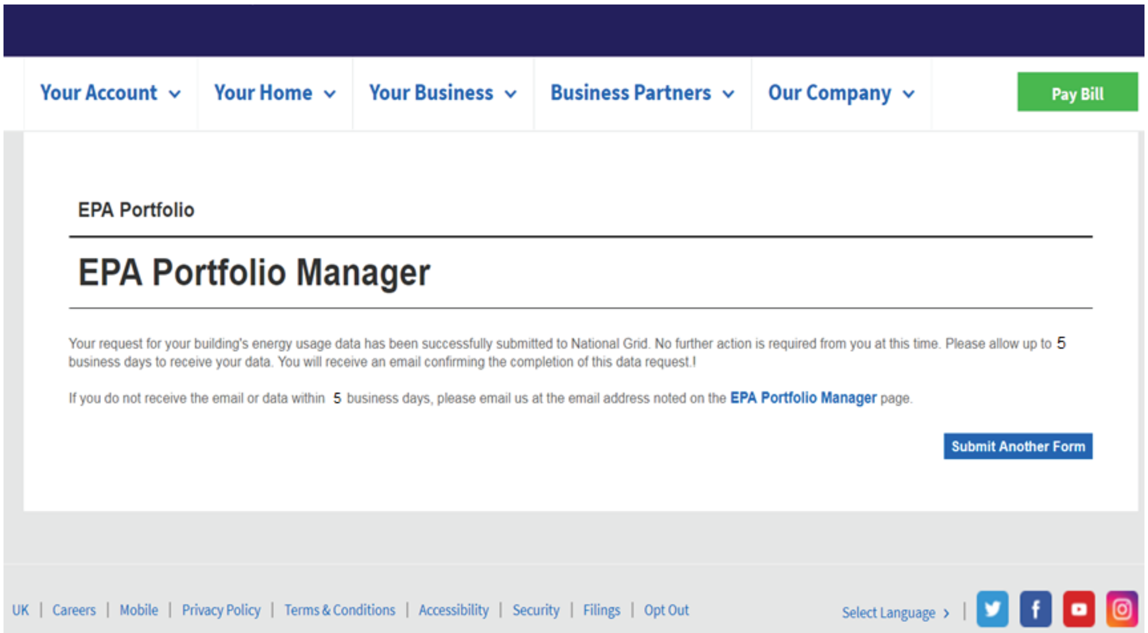
MA and RI Customers – **NE.energyefficiency@nationalgrid.com**

Or call **855-563-7448**, 8:00 am to 5:00 pm EST Monday through Friday

National Grid Web Submission Messages

After the National Grid webform is submitted, the following message will be displayed:

Successful Request Submission



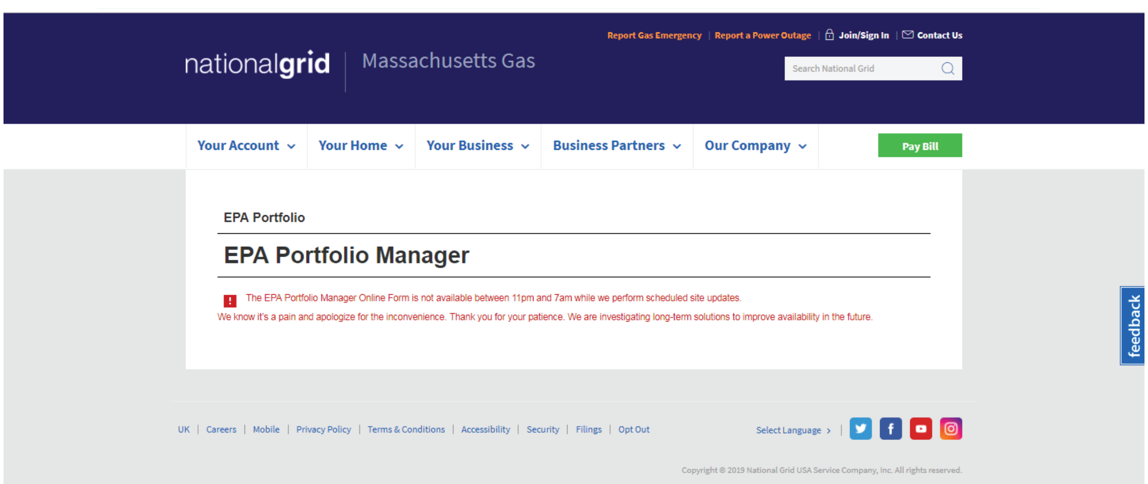
Once you have completed the National Grid application process, your usage data will be uploaded to the EPA Portfolio Manager within 5 business days.

Webform Submission Errors

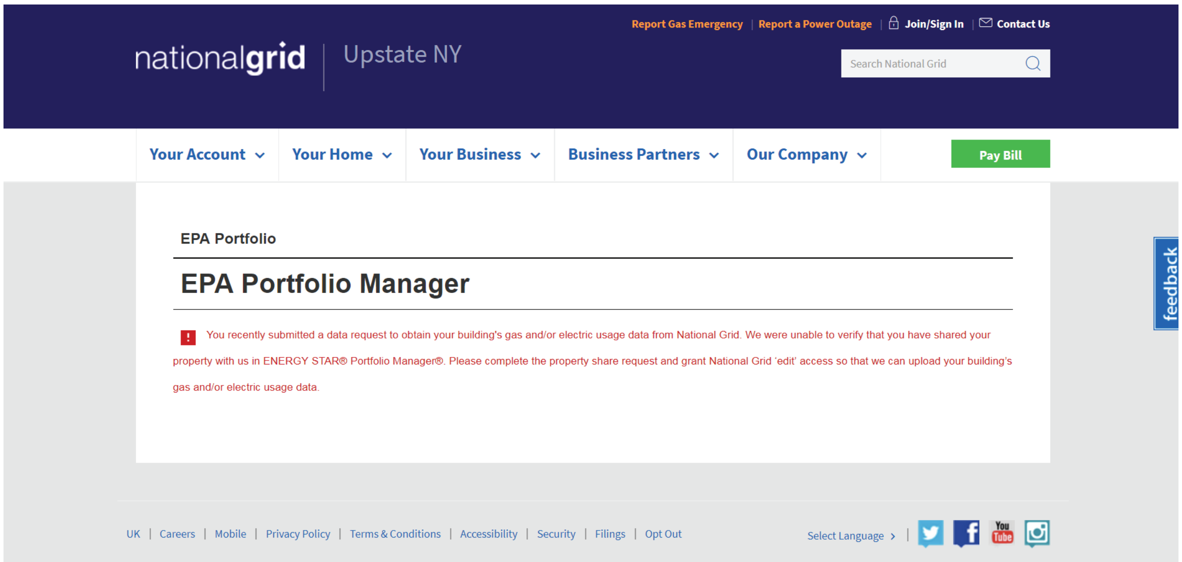
Customers that receive an error message must submit a new webform with the corrected information.

System Time Restriction Error for NYC and MA

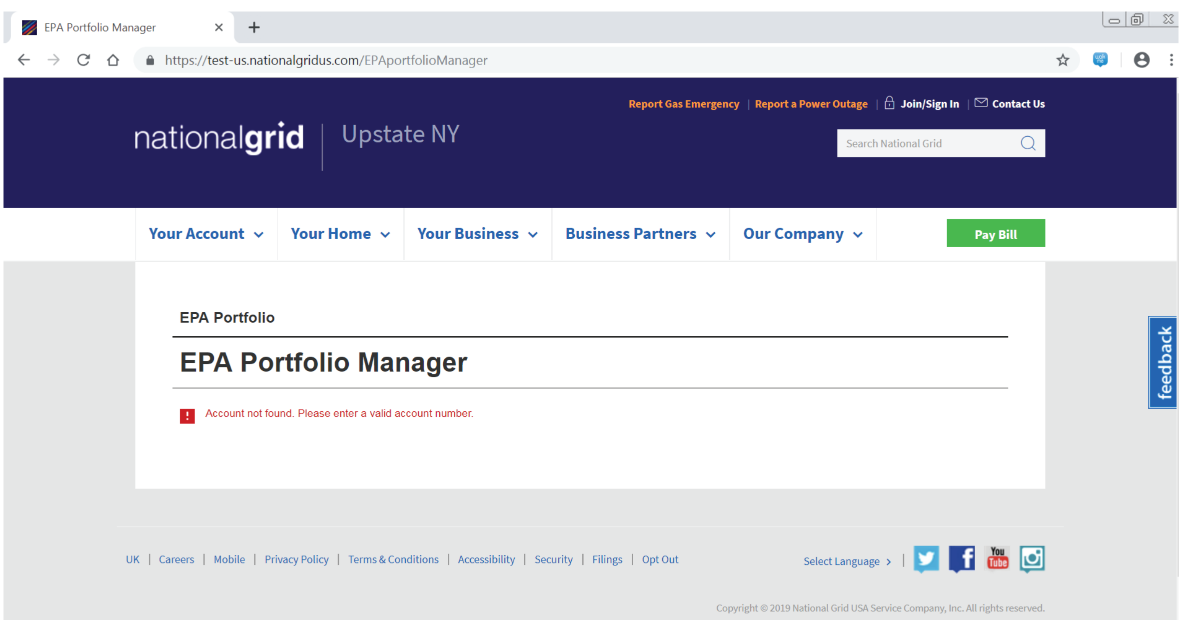
(National Grid system is not available from 11 pm to 7 am EST)



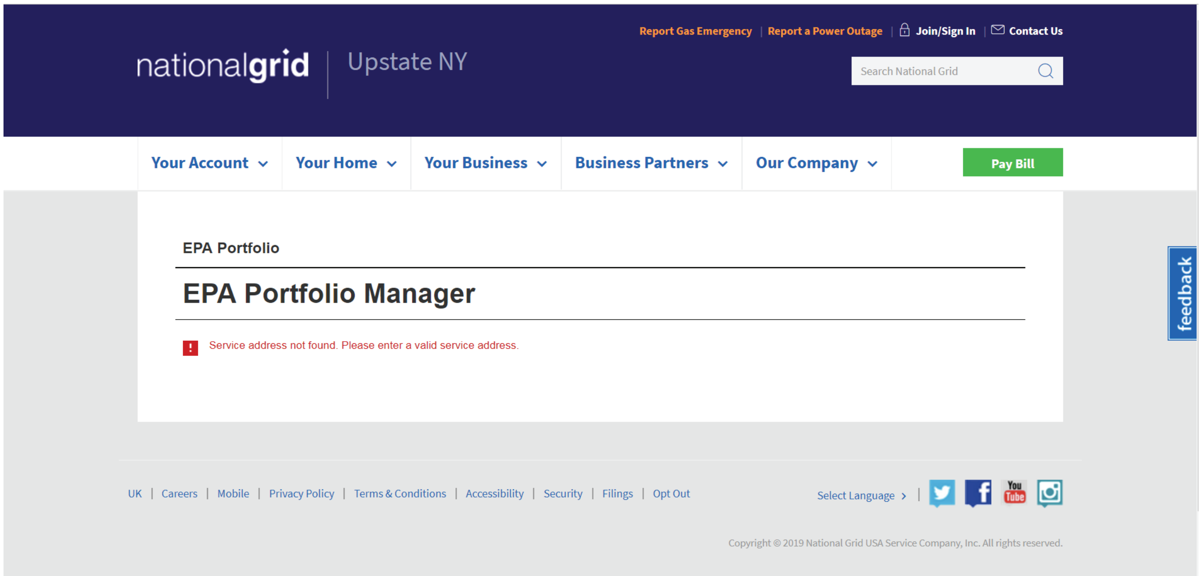
Property Share Access Level Validation Issue



Account Validation Issue

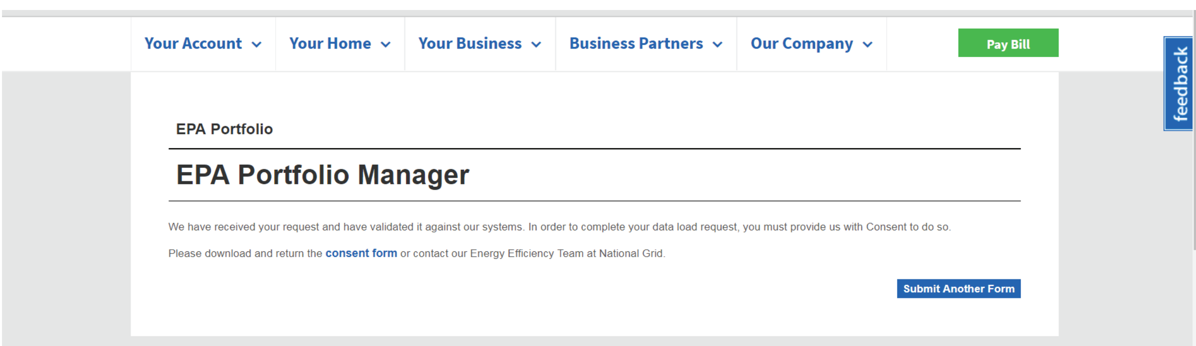


Service Address Validation Issue



Successful Submission - Consent Form Required

All buildings that have three (3) or fewer active accounts per commodity (electric and/or gas) are required to submit the Energy Usage Release Form for each tenant.



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Or call **855-563-7448**, 8:00 am to 5:00 pm EST Monday through Friday

Additional Historical Usage Data Upload Option

National Grid has implemented a new service that allows building owners that have already received their prior aggregated usage data to request for additional two (2) years of usage information.

To request additional usage data:

Step 1:	Start the aggregate data upload process, you must visit the **EPA Portfolio Manager site** to register your property and complete the SHARE PROPERTY procedure. (If you haven't done so already.)
Step 2:	Once you have completed the property share procedure with the EPA portfolio manager, select **EPA Portfolio Manager Online Form** link to complete the online register process with National Grid.

Additional historical usage data upload online form

Select the "Additional historical usage data upload online form" link.

After selecting the link the following information will be displayed.

Additional historical usage data upload online form

We have enhanced our system by providing customers the option to obtain two (2) additional years of aggregated whole-building usage data, after the initial data upload is completed.

If you have already completed the initial data load process using the steps and link outlined above, fill out the **Additional historical usage data upload online form** to receive two(2) additional years of prior aggregate usage information.

This additional data will take up to 7 business days to get uploaded into your portfolio manager account.

Select the "Additional historical usage data upload online form" link to begin the process.

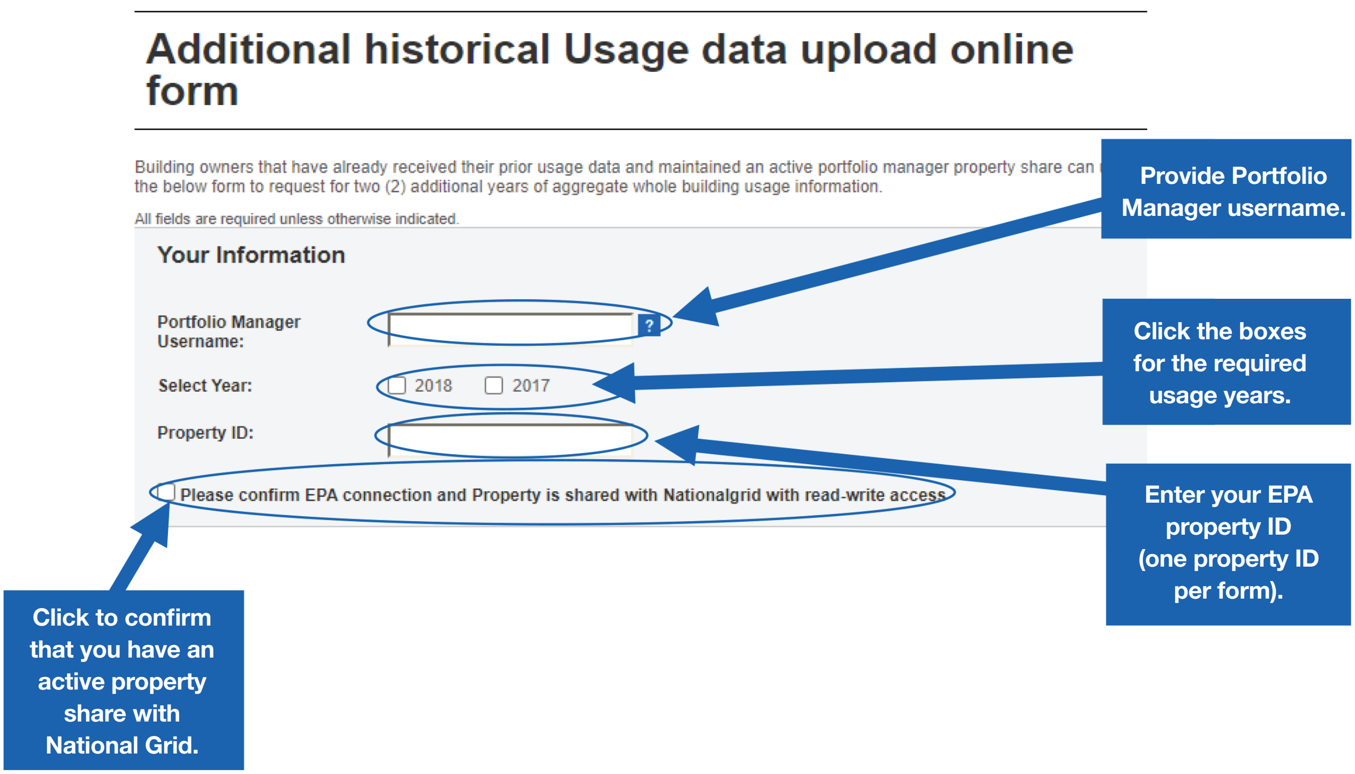
nationalgrid

Complete the Additional historical usage data upload online webform to receive your additional building aggregate usage information.

Note: you must have an active EPA portfolio manager web share request with National Grid to receive two (2) additional years of aggregate whole building usage information. This additional data may take up to 7 business days to get uploaded into your portfolio.

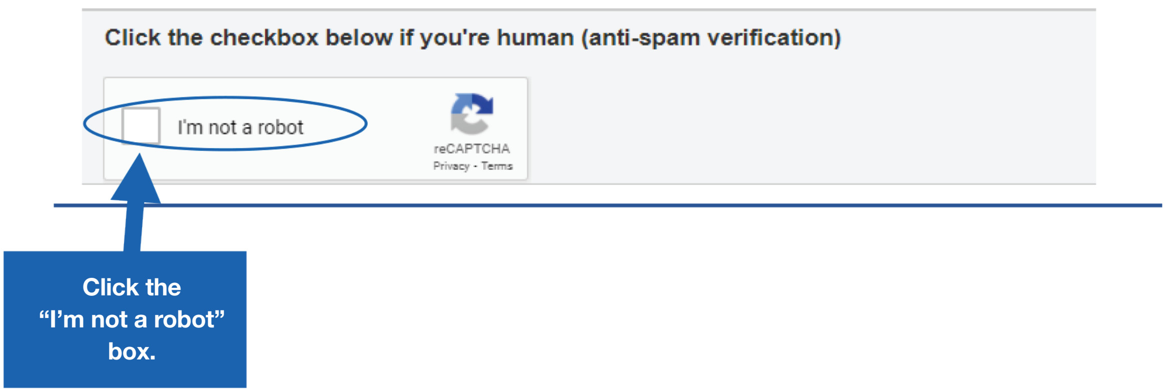
Step 1:

- Provide Portfolio Manager username.
- Select the years that you want additional aggregated usage information.
- Enter your EPA property ID for which you are requesting additional aggregated usage information.
    - o Note: This webform is for individual property usage requests only.
- Click confirmation that you have an active EPA property share with National Grid.



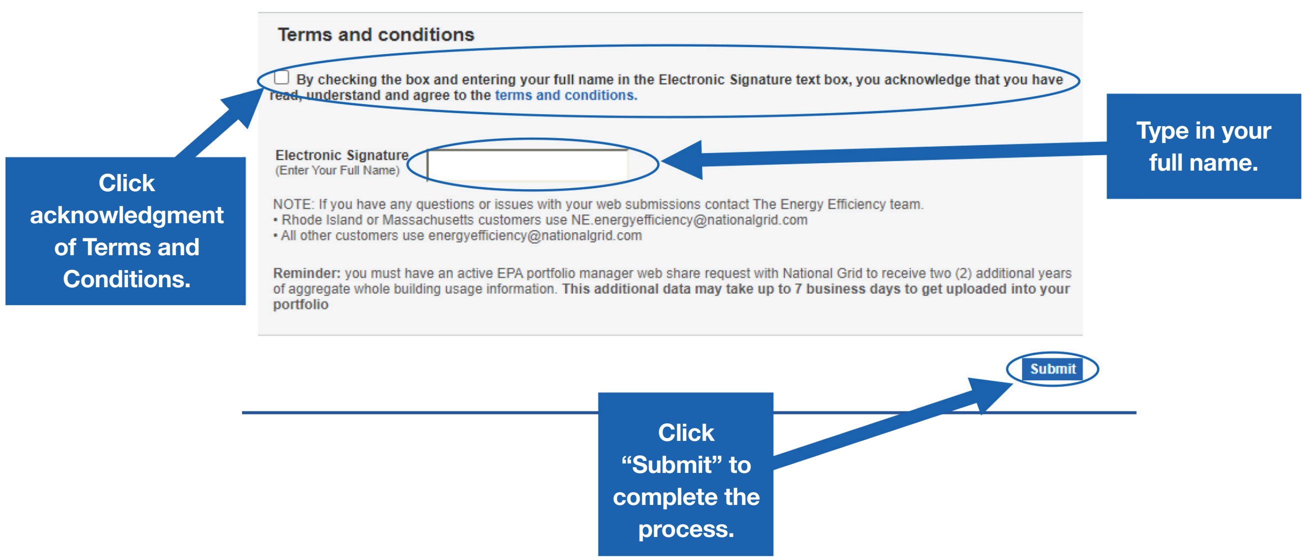
Step 2:

- Click the anti-spam verification box:



Step 3:

- Click acknowledgment of Terms and Conditions. (To view written terms and conditions, click on the blue wording.)
- Type in your full name.
- Click "Submit" button to complete the process.



National Grid Benchmarking Portal

Frequently Asked Questions

1 What type of data does National Grid upload into EPM?

National Grid provides annual aggregated usage information. Currently, going back to June 2019, we upload the following files to the EPM portfolio site:

Gas

- Heating and water heating aggregate usage
- Cooking account aggregate usage

Electric

- Aggregate electric usage data

2 How long does it take National Grid to accept the U.S. EPA'S ENERGY STAR® PORTFOLIO MANAGER® share requests?

First-Time Share Request: National Grid can take up to 24 hours to validate and accept an initial share request.

Resharing Data Request: Resharing requests are automatically accepted.

3 Will the EPA'S ENERGY STAR Portfolio Manager send an email to confirm that the share request was accepted?

The EPA'S ENERGY STAR Portfolio Manager does not have an email notification process to notify you that your share request is accepted.

4 How long do I need to wait after submitting a share request to submit a National Grid benchmarking webform?

First-Time Share Request: Please wait 24 hours before submitting a webform.

Resharing Data Request: After you have reshared your property you will need to contact the National Grid Benchmarking Portal Call Center at the following email or phone number to validate that the reshare has been accepted before filling out a new National Grid webform at **ngrid.com/epm** to restart the usage data upload process.

National Grid Benchmarking Portal Call Center:

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MA and RI Customers — **NE.energyefficiency@nationalgrid.com**

Or call **855-563-7448**, 8:00 am to 5:00 pm EST Monday through Friday

5 Does National Grid use tax lot — Block and Lot number (BBL)?

No, our customer systems do not currently have the option to add BBL.

6 How many months of data will National Grid provide?

National Grid will provide 12 calendar months of aggregate usage information per service address.

Please note: We do not provide block and lot property usage information.

7 How long does it take for me to get my aggregate usage information uploaded?

Usage data uploads will be processed and uploaded within 2 – 5 business days.

8 Does National Grid provide an option for customers to receive additional usage information through the benchmarking web portal?

National Grid has implemented a new services that allows building owners that have already received their prior aggregated usage data to request for additional two (2) years of usage information.

9 Does National Grid provide quarterly or monthly usage data updates?

As part of our system enhancements we will be providing you with quarterly data updates, if the Portfolio Manager connection request is active.

continued>

10 How long will the quarterly uploads last?

Quarterly updates will continue for up to 4 years as long as building owners maintain their EPA Portfolio Manager web share link as active. Deactivating the EPA Portfolio Manager property share link will disable the upload process.

11 Is there a cost associated with using the new National Grid Data Upload process?

No, this is a free service offered to National Grid customers.

12 Is the usage information provided based on a per meter basis or per building?

National Grid provides aggregate whole building usage information.

13 Who is required to submit Energy Usage Release Forms?

In MA, RI and UNY regions:

A. Properties that have THREE (3) active accounts or fewer per commodity (electric and/or gas) are required to complete, sign and submit an Energy Usage Release Form for each tenant, in PDF format.

Email the Energy Usage Release Form to:

Upstate NY Customers —
energyefficiency@nationalgrid.com

MA and RI Customers —
NE.energyefficiency@nationalgrid.com

B. Properties with FOUR (4) or more active accounts per commodity are not required to submit a separate Energy Usage Release Form per tenant; only online consent is required.

In NYC and LI:

C. Customers are not required to submit an Energy Usage Release Form; only online consent is required.

14 What happens if I mistakenly unshare my EPM property share with National Grid?

If you mistakenly remove National Grid's shared access to the property, it will break National Grid access to the gas meters that we have been populating with data.

You will need to reshare not just the property at "Full Access" but also the meters named "Natural Gas Main Meter" and "Gas Cooking Meter" (if applicable) to restart the usage data upload process.
After you have reshared your property, you will need to contact the National Grid Benchmarking Portal Call Center at the email or phone number below to validate that the reshare has been accepted before filling out a new National Grid webform at **ngrid.com/epm** to restart the usage data upload process.

National Grid Benchmarking Portal Call Center:

NYC, LI and Upstate NY Customers —
energyefficiency@nationalgrid.com

MA and RI Customers —
NE.energyefficiency@nationalgrid.com

Or call **855-563-7448**, 8:00 am to 5:00 pm EST Monday through Friday

15 Will I need to submit a new National Grid webform to restart usage data uploads after I reshare my EPM property share access?

Yes, after you reshare your EPM property share access, you will need to fill out a new National Grid webform before the data upload process can resume.

16 What aggregate usage information will I receive if I submit a my request on January 1st ?

National Grid systems is designed to provide prior year aggregate usage data.

Customers that submitted their data requests on or after January 1, 2021.

- Will receive 2020 aggregate usage data.

Customers that submitted their data request on or before December 31, 2020.

- Will receive 2019 aggregate usage data.

17 Can National Grid upload individual tenant usage information?

National Grid provides whole building usage information only. If a property owner wants individual tenant usage information they would need to obtain a consent form from the customer and manual report would be provided, once we receive the signed tenant consent form.

Appendix

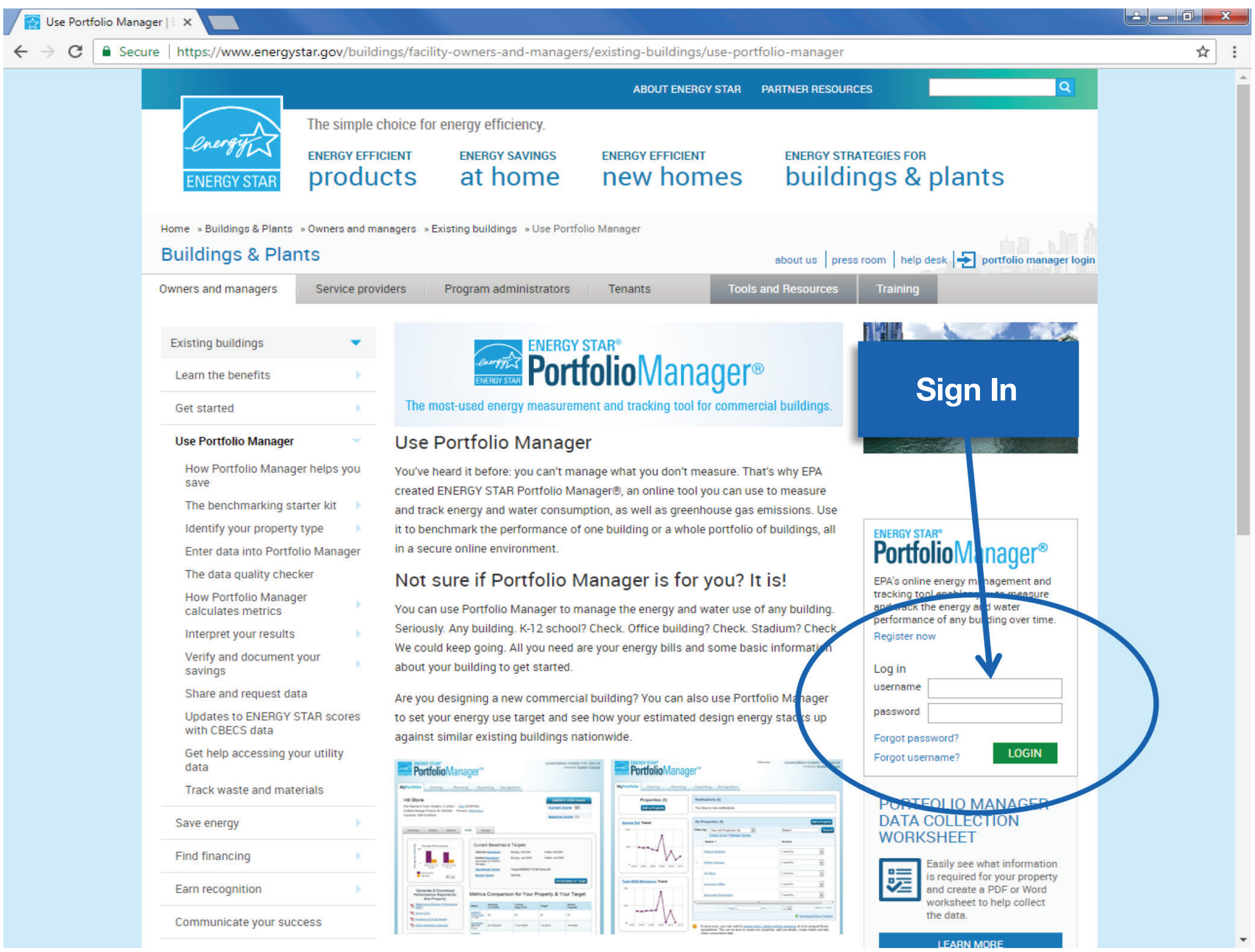
Creating an ENERGY STAR® Portfolio Manager Account:

STEP 1: How to register a Portfolio Manager account

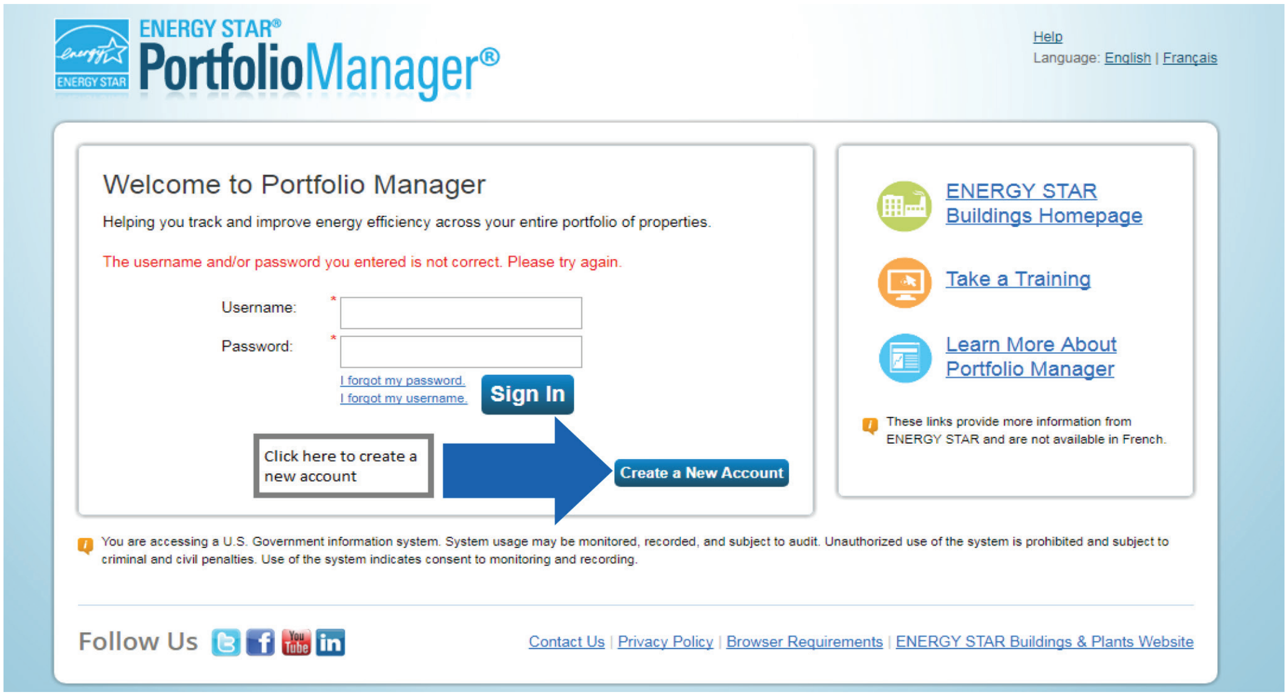
A. Go to the ENERGY STAR Portfolio Manager Login page:

https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager

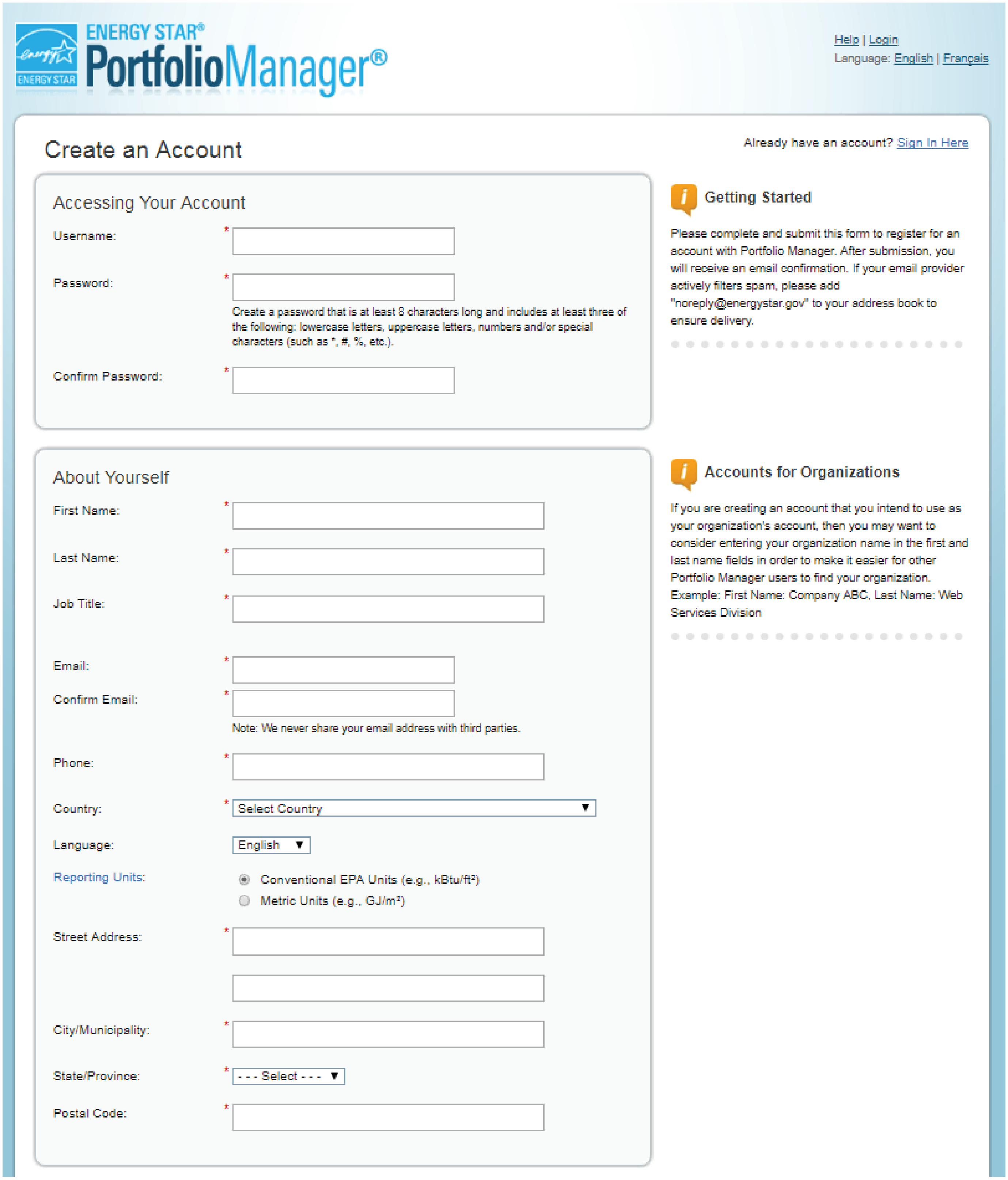
If you have a Portfolio Manager account, enter your username and password.
If you do not have an account, click on 'Register now'.



B. Fill out the required information (marked by a red asterisk). Note that the username and password should not contain any special characters or spaces. An email will be sent to you for verification after you save your profile.



Note: Your Portfolio Manager password must have 3 of 4: upper case, lower case, numeric, special character.



ENERGY STAR® PortfolioManager®

Help | Login
Language: English | Français

Create an Account

Already have an account? Sign In Here

Accessing Your Account

Username: *

Password: *

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

Confirm Password: *

Getting Started

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

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

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

Phone: *

Country: * Select Country

Language: English

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

Street Address: *

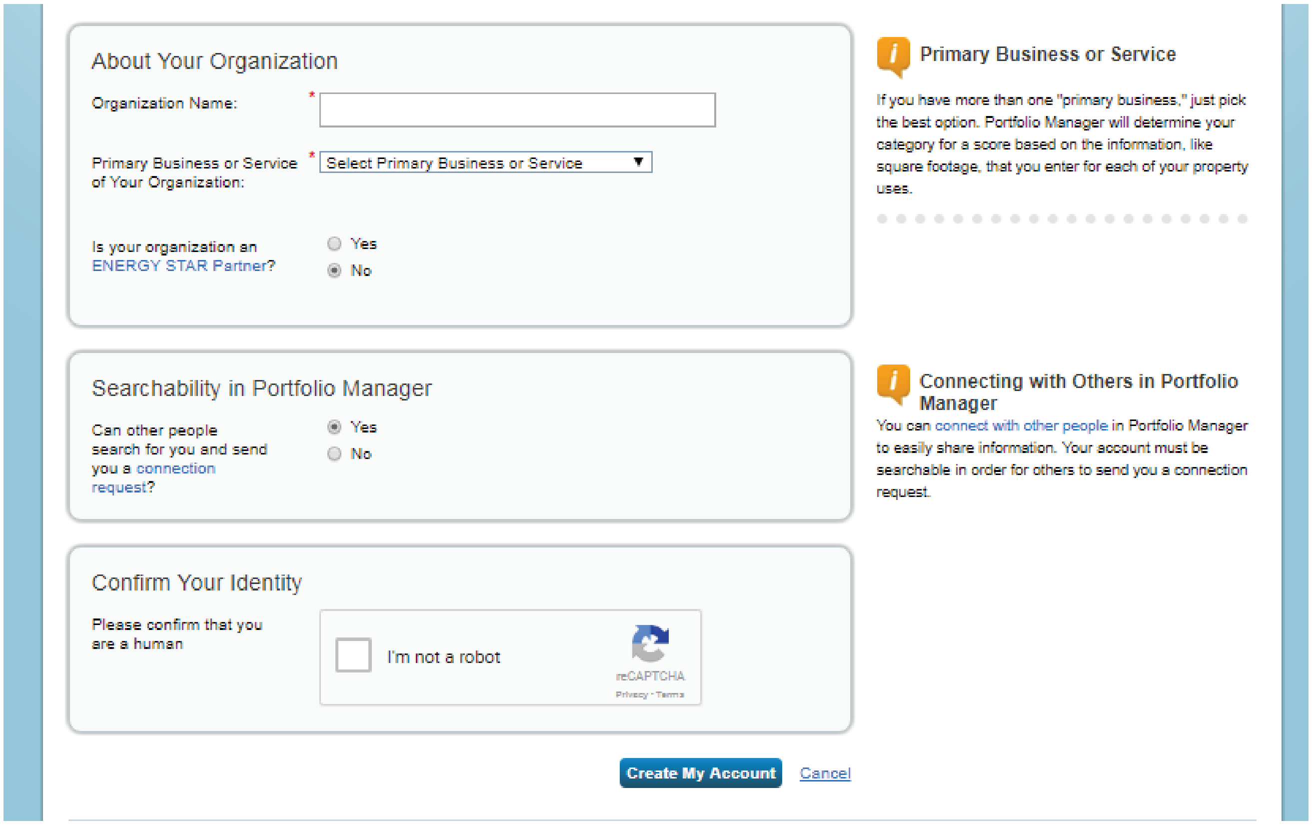
City/Municipality: *

State/Province: * - - - Select - - -

Postal Code: *

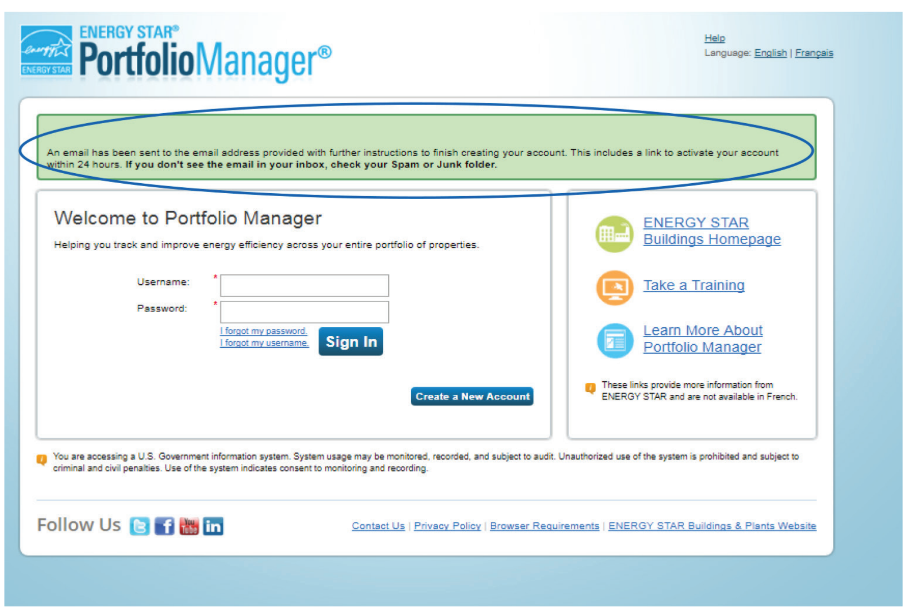
Accounts for Organizations

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



When you have completed the Portfolio Manager registration process, the following message will be displayed:

'An email has been sent to the email address provided with further instructions to finish creating your account.'

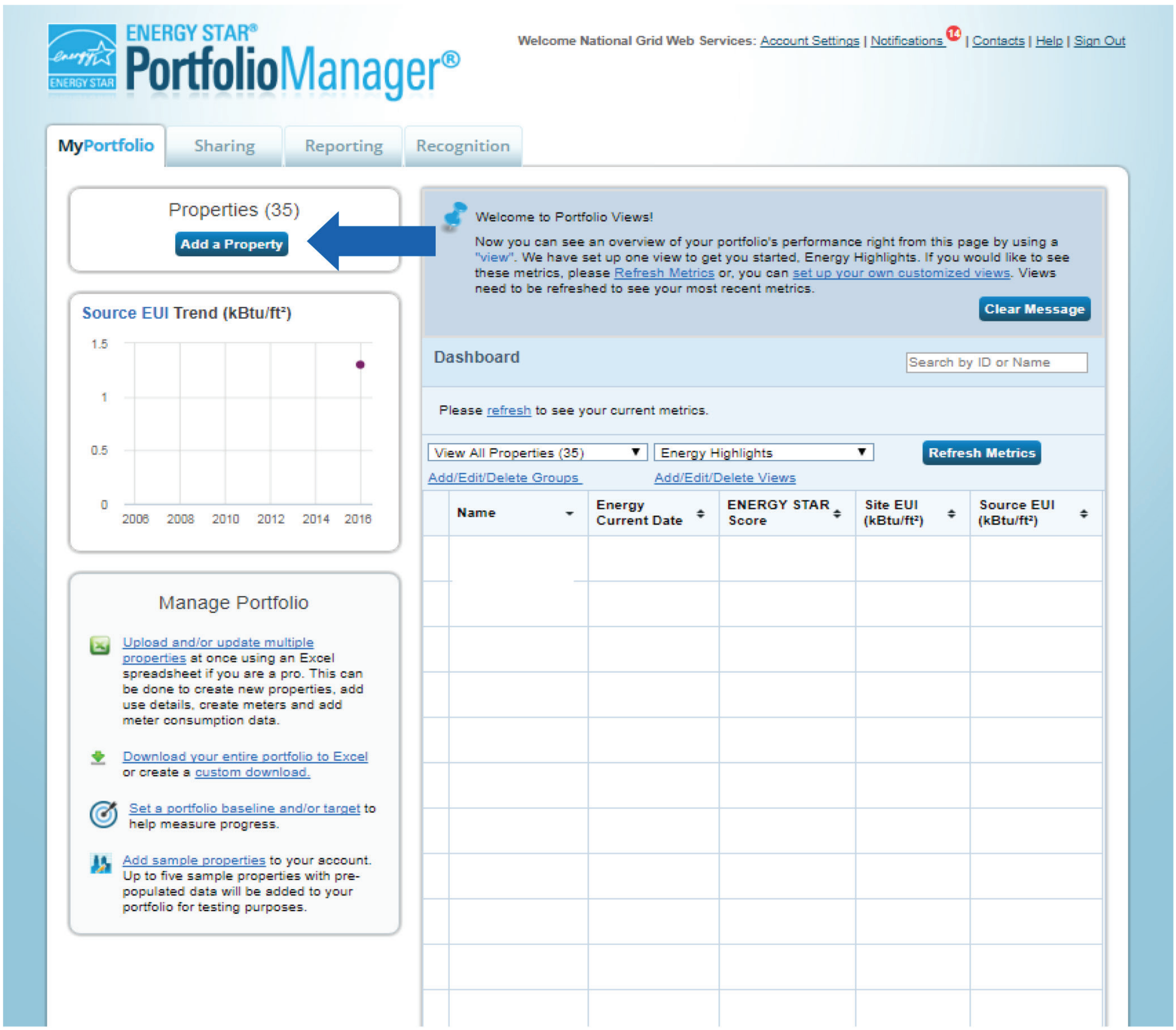


nationalgrid

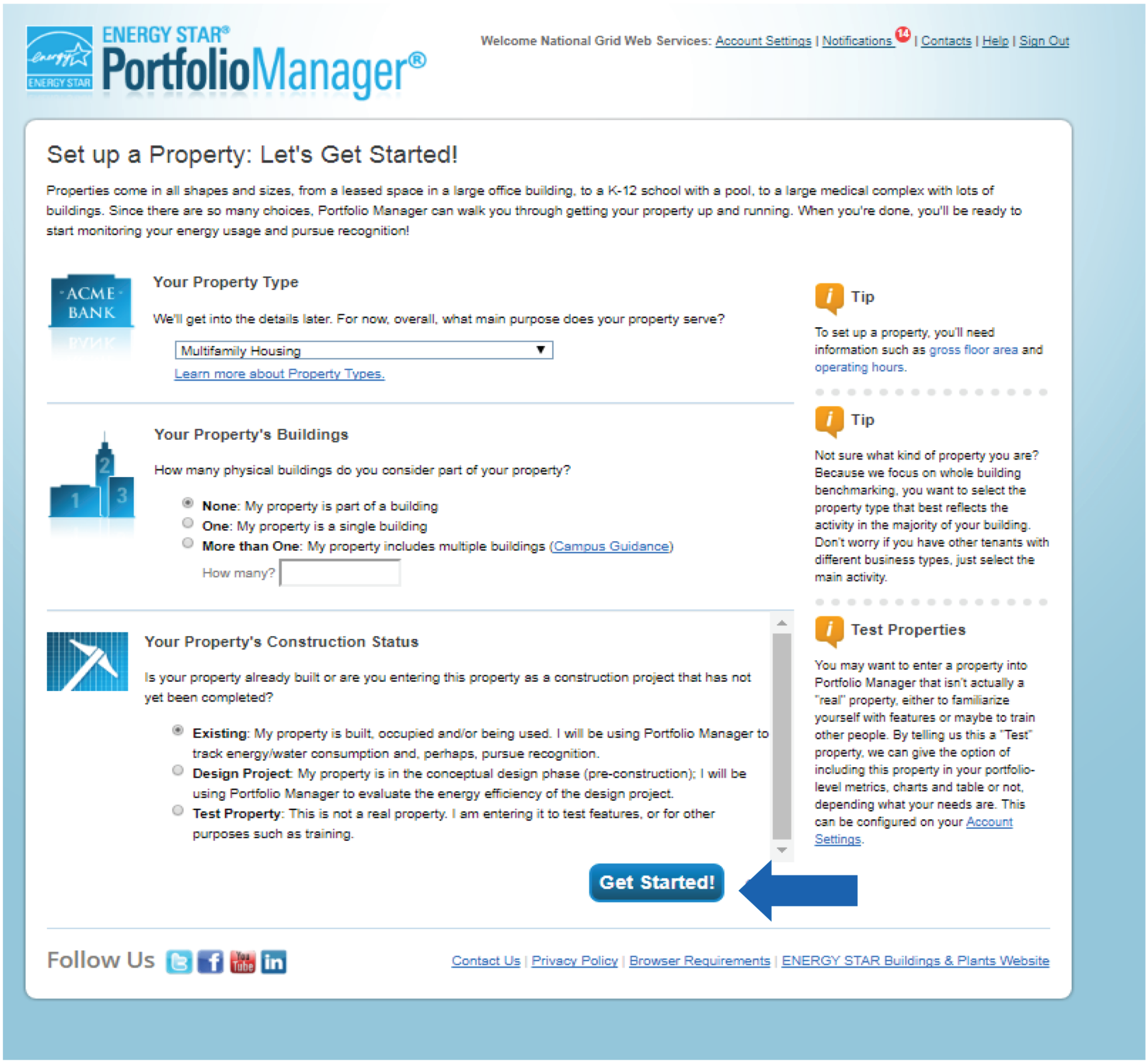
STEP 2: How to add a property to Portfolio Manager

If you have already created a property in Portfolio Manager, please verify that the property address in Portfolio Manager matches the service address on your bill, then skip to Step 3.

A. Select "Add a Property."

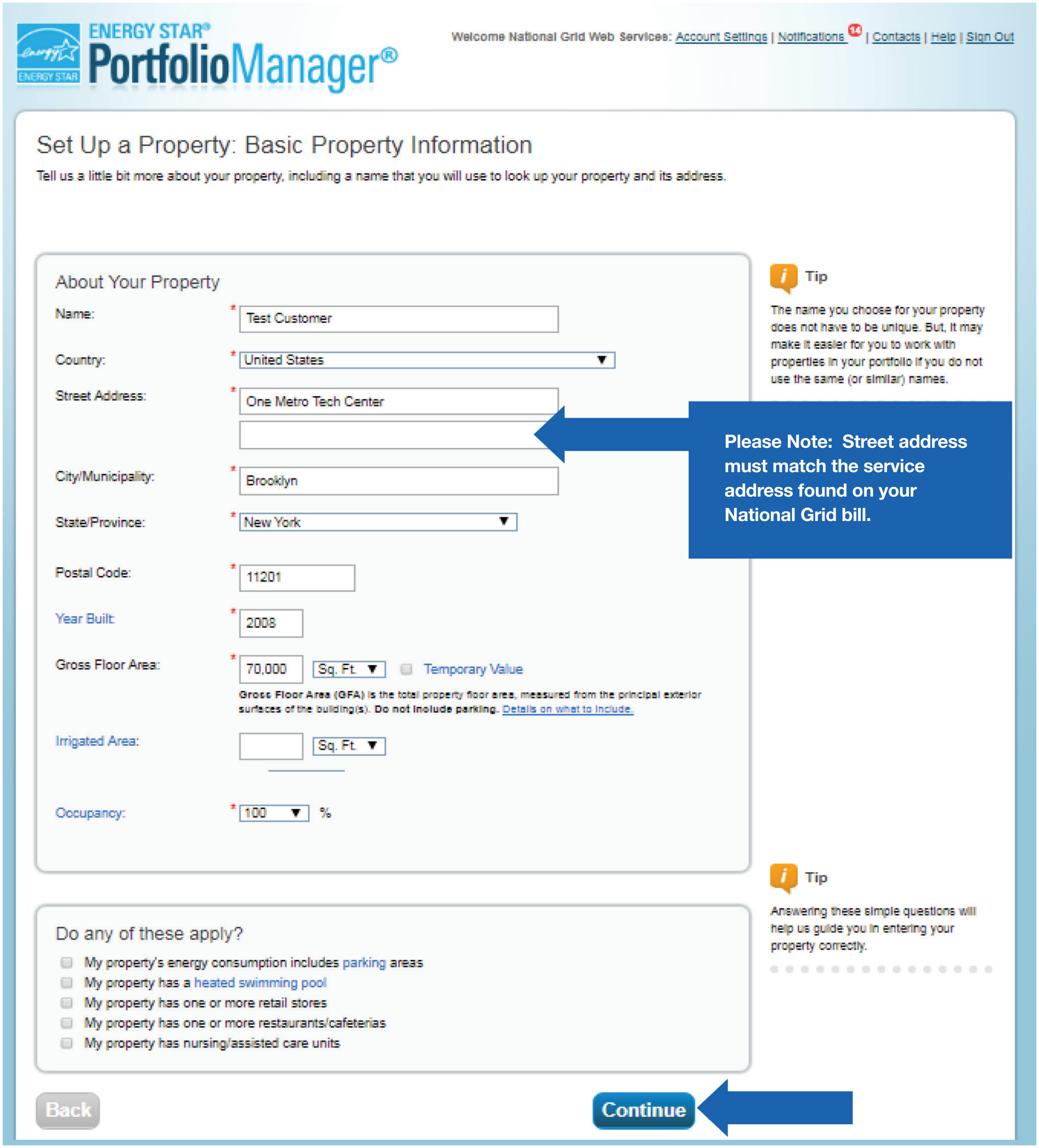


B. Select your property type, number of buildings that are part of your property, and construction status, then click "Get Started."

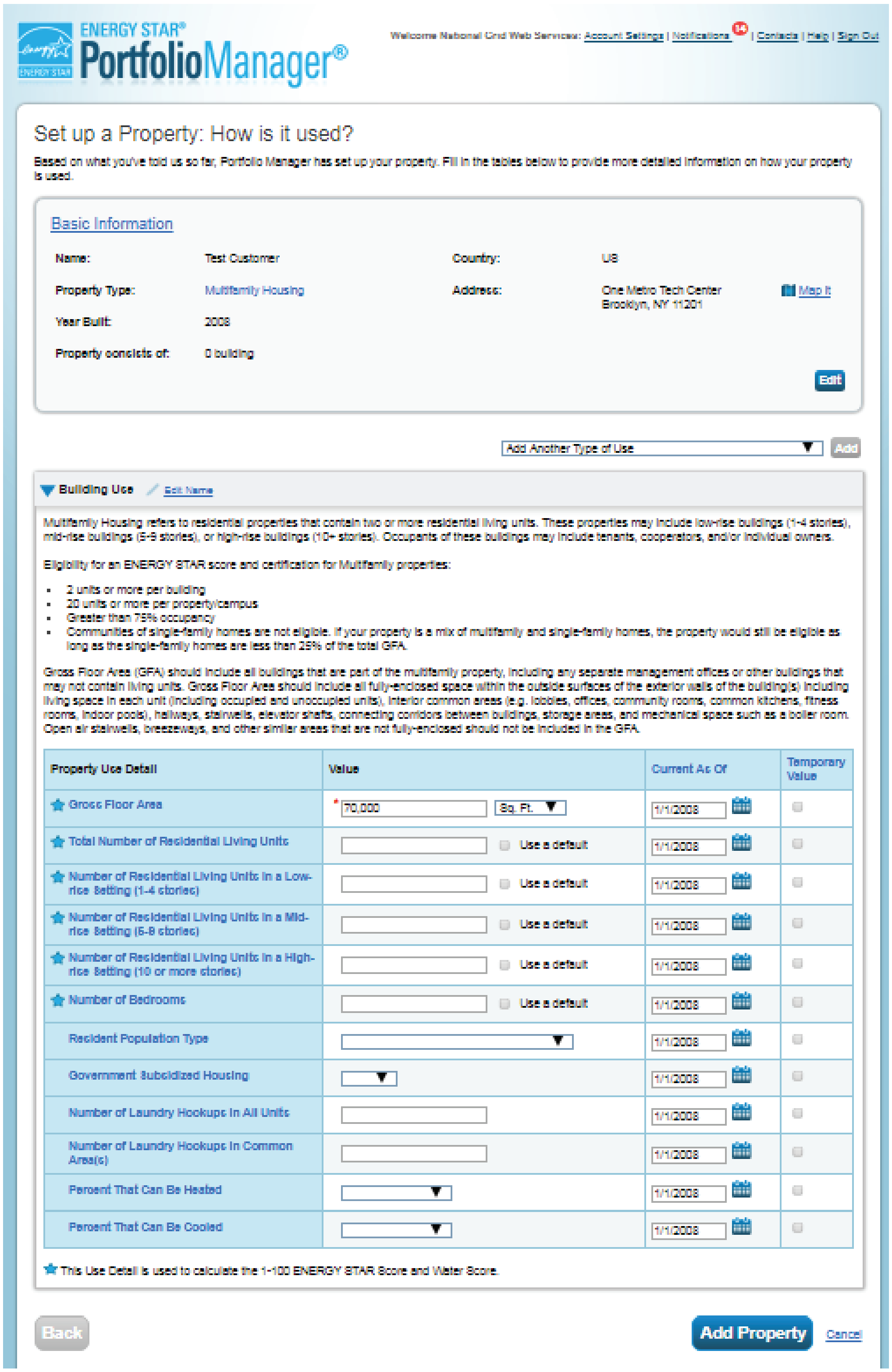


nationalgrid

C. Enter your property service address as found on your National Grid bill, Year Built, Gross Floor Area and Occupancy percentage, then click "Continue."



D. Select the appropriate Building Use from the list and complete the required fields, then click "Add Property."


ENERGY STAR® PortfolioManager®

Welcome National Grid Web Services: Account Settings | Notifications 14 | Contacts | Help | Sign Out

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 Customer	Country:	US
Property Type:	Multifamily Housing	Address:	One Metro Tech Center Brooklyn, NY 11201 (Map It)
Year Built:	2008		
Property consists of:	0 building		

Edit

Add Another Type of Use | Add

Building Use Edit Name

Multifamily Housing refers to residential properties that contain two or more residential living units. These properties may include low-rise buildings (1-4 stories), mid-rise buildings (5-9 stories), or high-rise buildings (10+ stories). Occupants of these buildings may include tenants, cooperators, and/or individual owners.

Eligibility for an ENERGY STAR score and certification for Multifamily properties:

- 2 units or more per building
- 20 units or more per property/campus
- Greater than 75% occupancy
- Communities of single-family homes are not eligible. If your property is a mix of multifamily and single-family homes, the property would still be eligible as long as the single-family homes are less than 25% of the total GFA.

Gross Floor Area (GFA) should include all buildings that are part of the multifamily property, including any separate management offices or other buildings that may not contain living units. Gross Floor Area should include all fully-enclosed space within the outside surfaces of the exterior walls of the building(s) including living space in each unit (including occupied and unoccupied units), interior common areas (e.g. lobbies, offices, community rooms, common kitchens, fitness rooms, indoor pools), hallways, stairwells, elevator shafts, connecting corridors between buildings, storage areas, and mechanical space such as a boiler room. Open air stairwells, breezeways, and other similar areas that are not fully-enclosed should not be included in the GFA.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 70,000 Sq. Ft.	1/1/2008	
★ Total Number of Residential Living Units	Use a default	1/1/2008	
★ Number of Residential Living Units in a Low-rise Setting (1-4 stories)	Use a default	1/1/2008	
★ Number of Residential Living Units in a Mid-rise Setting (5-9 stories)	Use a default	1/1/2008	
★ Number of Residential Living Units in a High-rise Setting (10 or more stories)	Use a default	1/1/2008	
★ Number of Bedrooms	Use a default	1/1/2008	
Resident Population Type		1/1/2008	
Government Subsidized Housing		1/1/2008	
Number of Laundry Hookups in All Units		1/1/2008	
Number of Laundry Hookups in Common Area(s)		1/1/2008	
Percent That Can Be Heated		1/1/2008	
Percent That Can Be Cooled		1/1/2008	

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

Back | Add Property | Cancel

STEP 3: How to connect your Portfolio Manager account to National Grid, and share your Property with National Grid

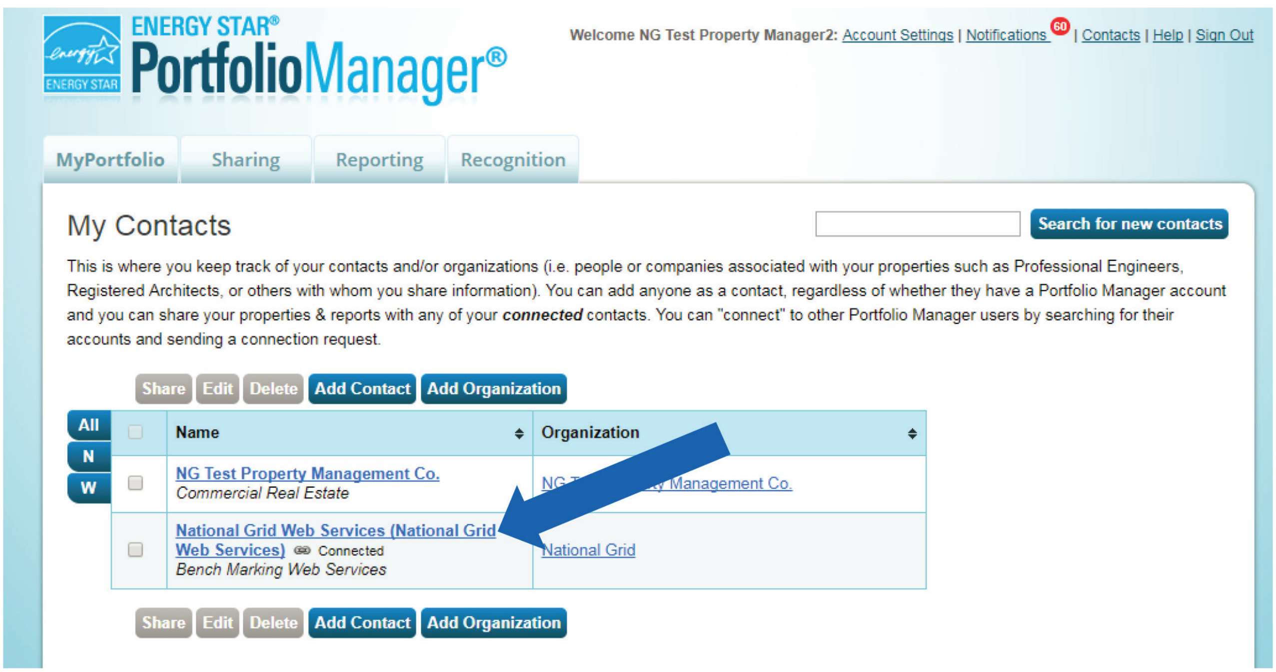
To begin the data sharing process a building owner or property manager or consultants must:

- Create an account in the ENERGY STAR EPA Portfolio Manager site
- Submit a data sharing request in the ENERGY STAR EPA Portfolio Manager site.
    - Select National Grid Web Service

Connect with National Grid:

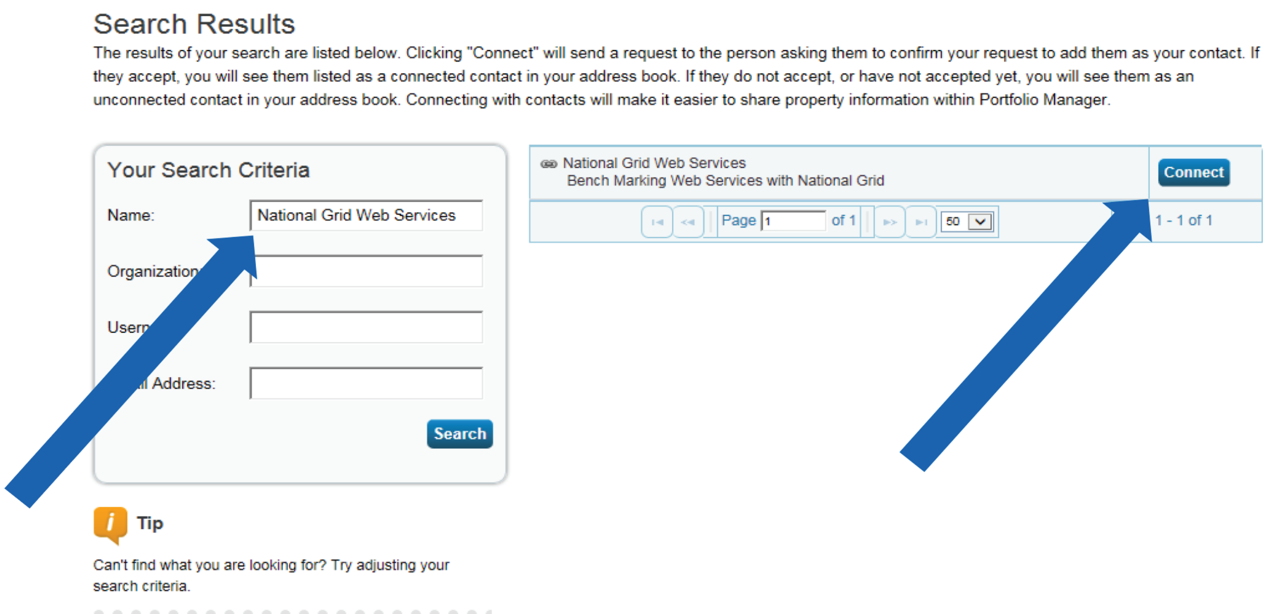
1) Check if National Grid is already a contact.

    - Click on Contacts in the upper right corner of the MyPortfolio page. On the My Contacts page, check if National Grid Web Services is listed as Connected.

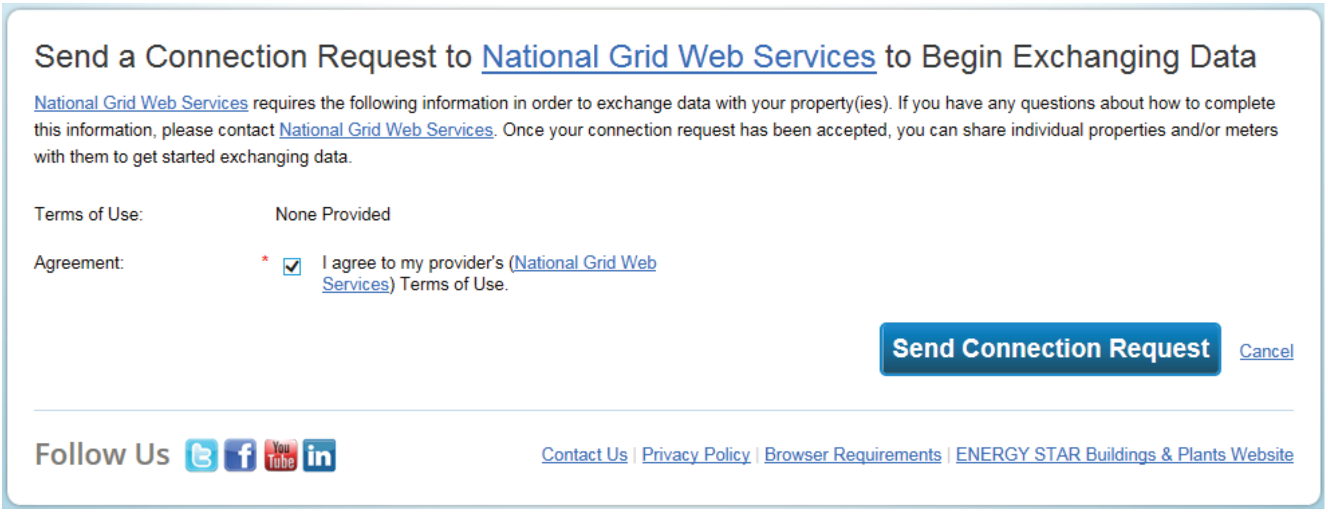


2) If National Grid is connected, go to Step B below. If not:

- Click Add Contact.
- To search for National Grid, enter
    - o Name: National Grid Web Services
- Click Search.
- From the list, locate "National Grid Web Services."
- Click Connect.



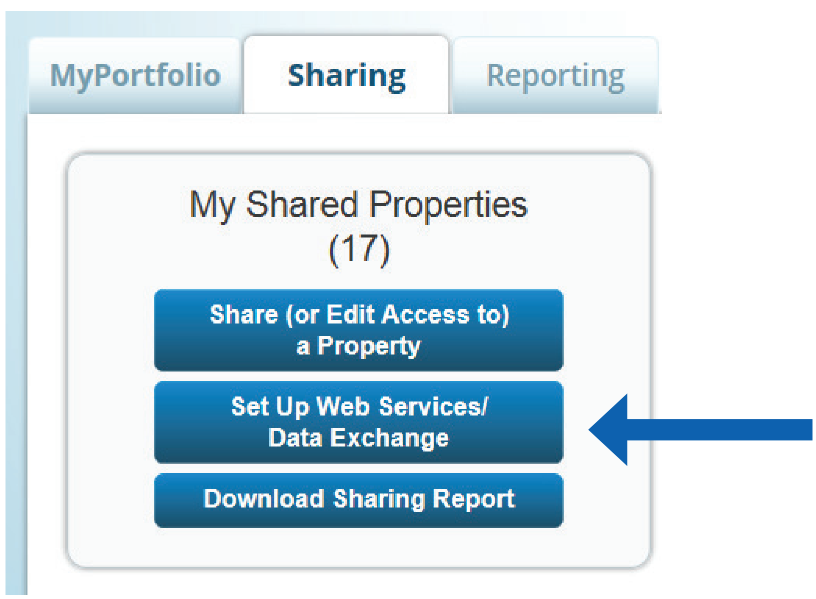
- After clicking "Connect," you will be prompted to accept National Grid's Terms of Use. Check the box next to "I agree" and then click "Send Connection Request." This will send your connection request to National Grid. When National Grid accepts your connection request, you will receive a notification in your Portfolio Manager account. At this point, you will be able to move on to the next step, sharing your property with National Grid.



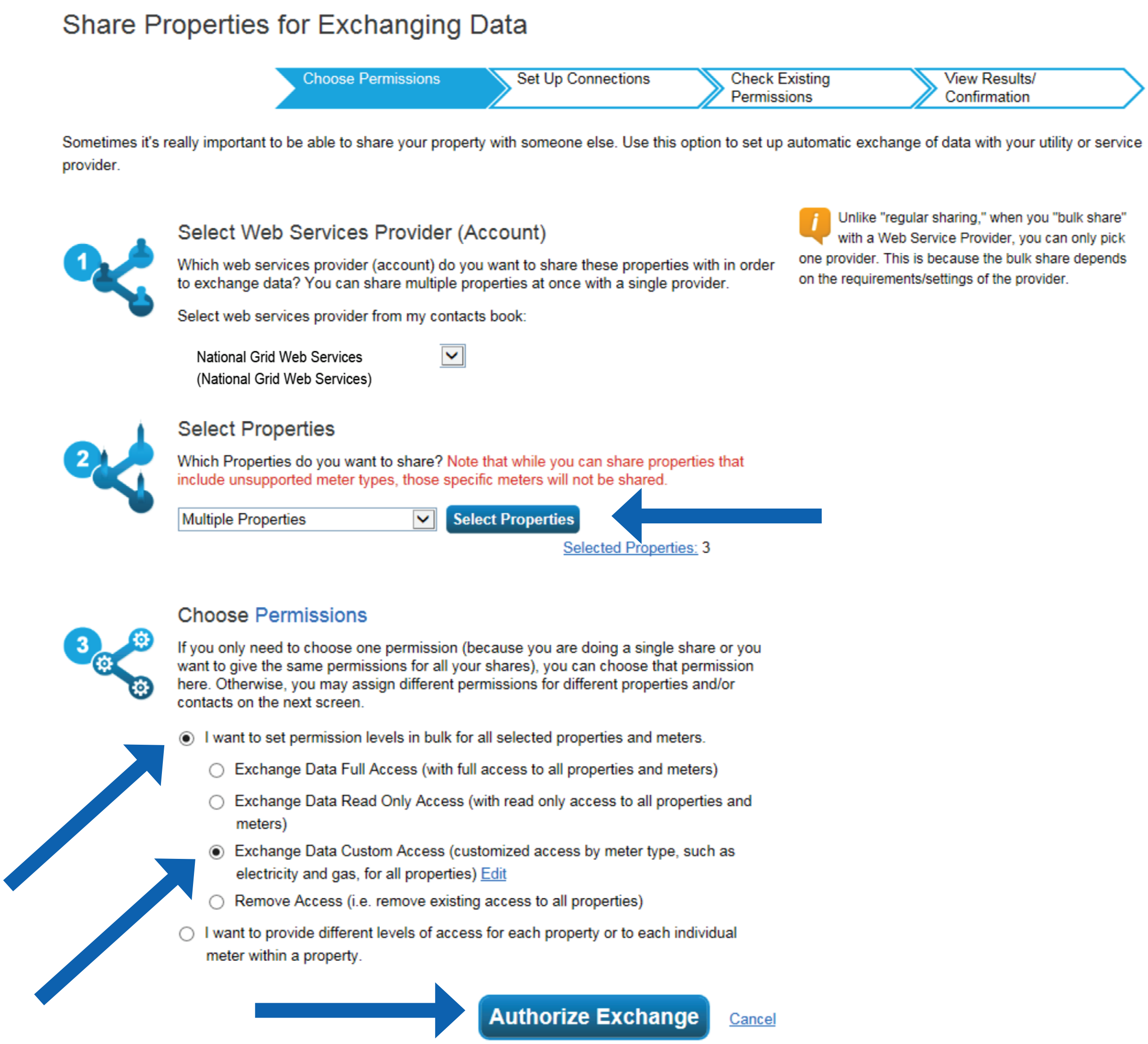
3) Share the Property

Please follow these steps. Even if you have previously shared with another National Grid Portfolio Manager account, you still need to connect and share with this account ("National Grid Web Services") in order to have National Grid send you your energy data automatically.

- Click on the Sharing tab.
- Click on "Set Up Web Services/Data Exchange."



4) On the “Share Properties for Exchanging Data” page, go to “Select Web Services Provider (Account),” and choose “National Grid Web Services” from the drop-down list.

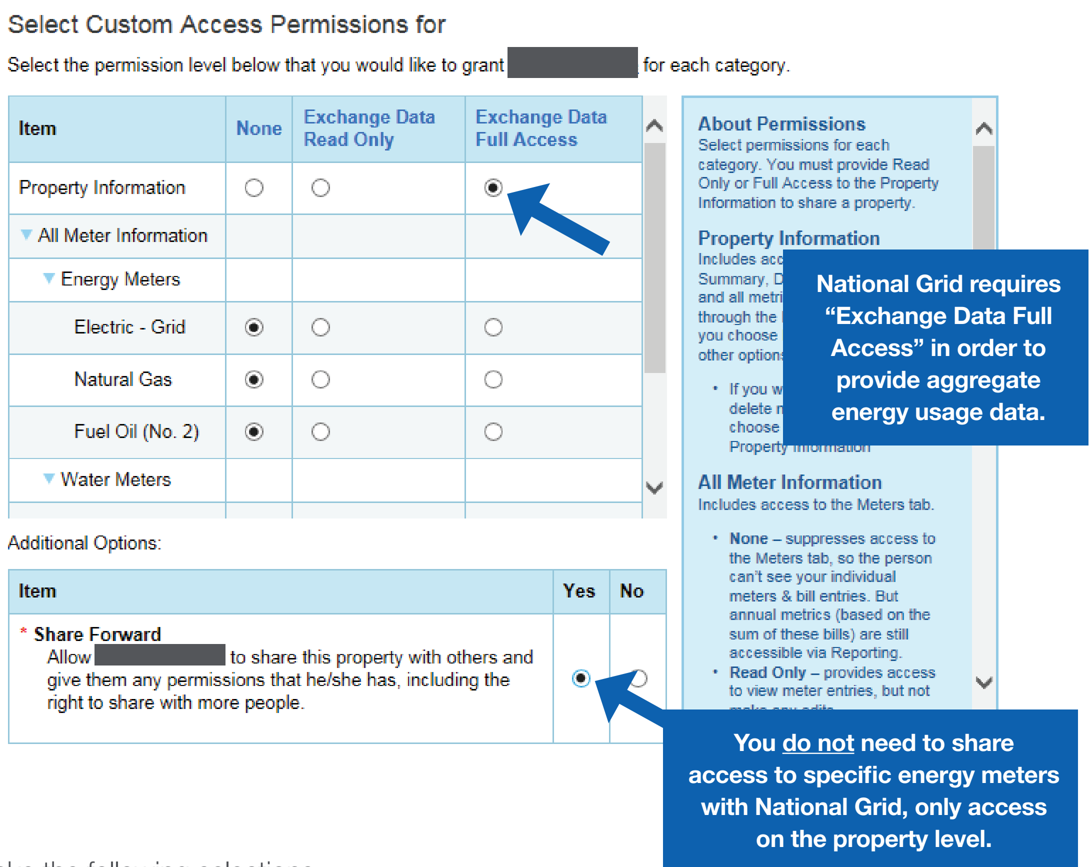


5) Go to “Select Properties,” and use the drop-down menu to indicate whether you wish to share one property, multiple properties, or all properties with National Grid.

- If you need National Grid data for just one property, select “One Property” from the drop-down list. Then, you will be presented with a second drop-down list from which you can select the property to share.
- If you need National Grid data for more than one property, you may choose “Multiple Properties” from the drop-down list. From there, click the button that says “Select Properties,” and a new window will pop up, where you will be prompted to select the properties that you would like to share. Check the boxes next to the property names you wish to share, click “Apply Selection,” and you will be taken back to the “Share Properties for Exchanging Data” page. Make sure that the correct number of “Selected Properties” is showing.

6) Go to “Choose Permissions” and select the first option, “I want to set permission levels in bulk for all selected properties and meters.”

- From the list of options that appears, select **“Exchange Data Custom Access.”** This will launch a new window, where you can set the Access Permissions that will apply to all properties that you are sharing with National Grid.



- Make the following selections:
    - o **Property Information:** select “Exchange Data Full Access.”
    - o **Meter Information:**
        - ▪ For each meter displayed, choose “None’” – even if existing National Grid meters are listed.
            - **You do not need to share access to specific energy meters with National Grid.** After you have successfully shared your property, National Grid will create one or more new “virtual” meters, into which your aggregate energy consumption data will be uploaded.
            - If you do select “Read Only” or “Full Access” at the meter level, this will be ignored by National Grid, and may even be rejected, since meter-level shared access is not needed by National Grid’s system. As long as you have provided “Full” access at the property level, then this will be sufficient.

- ✓ **Water Meters:** select "None."
- ✓ **Goals, Improvements, & Checklists:** select "None."
- ✓ **Recognition:** select "None."
- ✓ **Share Forward:** select "Yes."

  - Click "Apply Selection," which will return you to the "Share Properties for Exchanging Data" page

7) From the "Share Properties for Exchanging Data" page, review your selections and then click "Authorize Exchange."

8) If there are any issues with your sharing request (e.g., you attempted to share a property for which you do not have the necessary access rights), Portfolio Manager will alert you and prompt you to make corrections. Otherwise, you will see a confirmation page that says, "Bulk Share Properties for Exchanging Data: Results." You will also see confirmation of the outgoing shares in the "Sharing Notifications" box on the "Sharing" tab of your Portfolio Manager account.

First-Time Share Request
Please allow National Grid up to 24 hours to validate and accept the initial share request.