CenterPoint Energy

ACCESSING NATURAL GAS DATA USING ENERGY DATA PORTAL

INSTRUCTIONS FOR THIRD PARTY SERVICE PROVIDERS
ASSISTING CENTERPOINT ENERGY CUSTOMERS

MATERIAL PRESENTED ON A COURTESY BASIS

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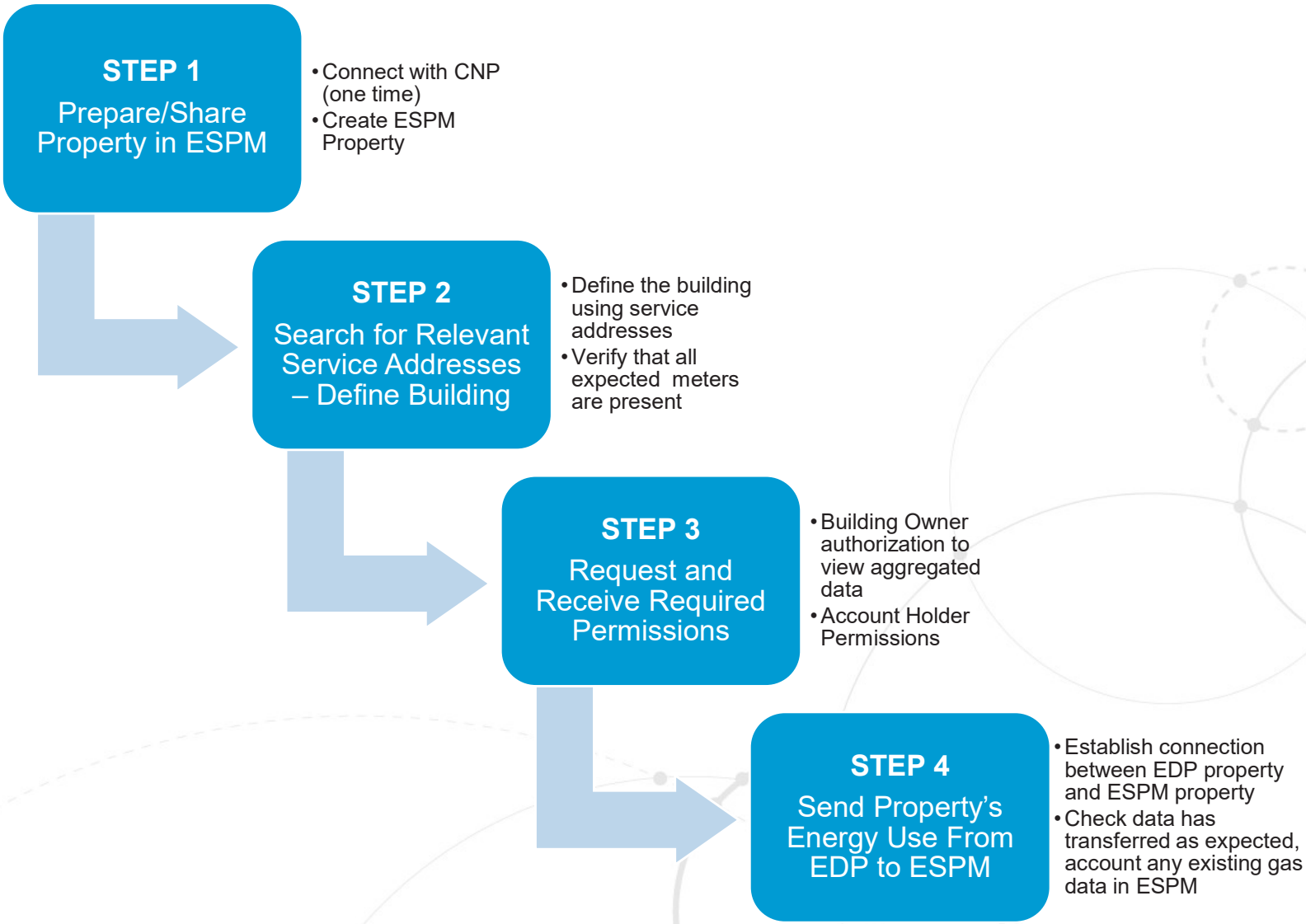
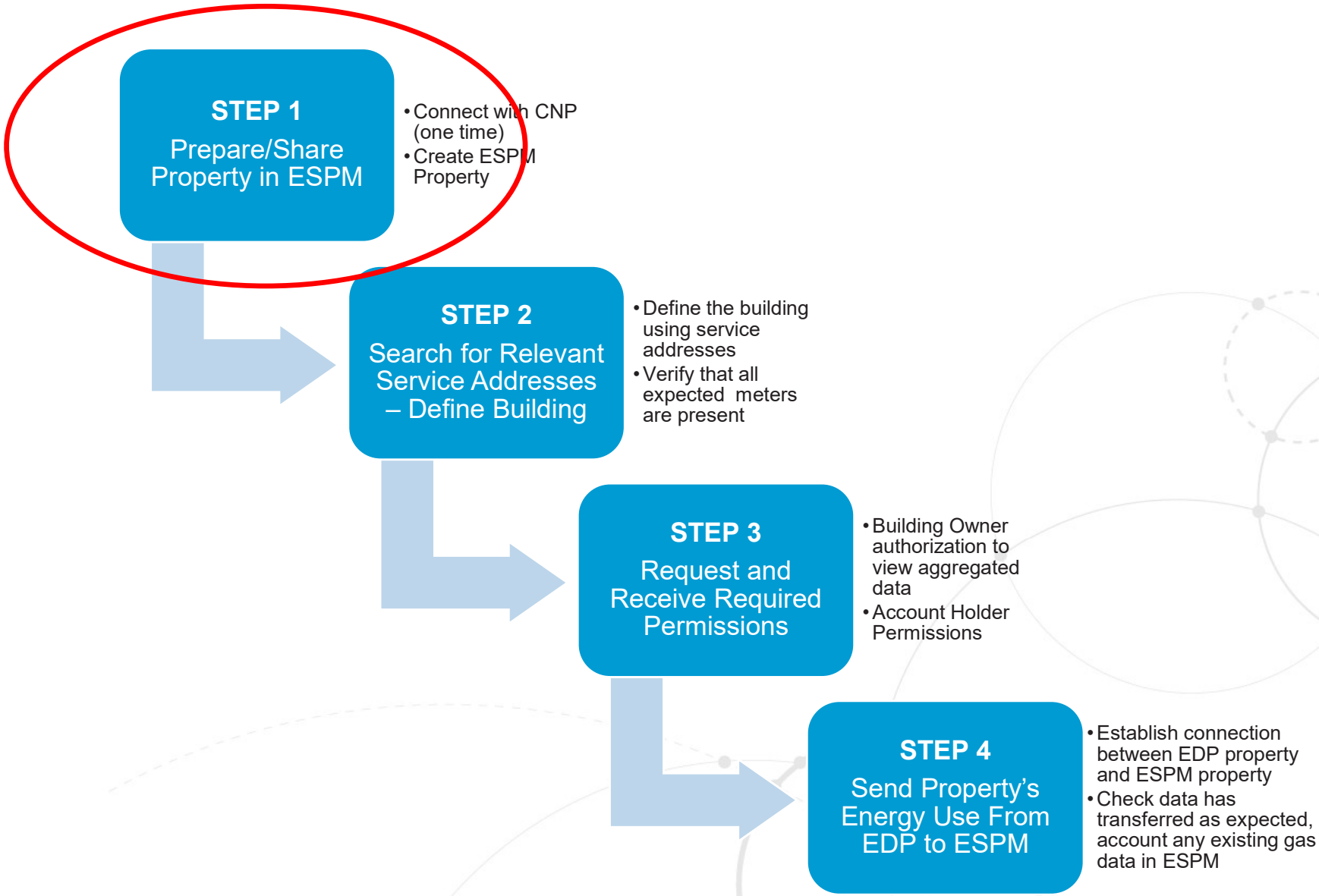
PROCESS OVERVIEW



PREPARATION/ ORGANIZATION IS KEY FOR USERS (ESPECIALLY WITH MULTIPLE BUILDINGS)

- Your customers should gather all their CenterPoint Energy bills for the property (only bills that they pay, they do not need tenants' bills)
- Customers with large portfolio of many buildings/many service addresses may want to map all accounts/service addresses to buildings as a first step
- You should also understand the metering arrangement at the building – are units/suites individually metered or is the building master-metered?

PROCESS OVERVIEW



STEP 1: PREPARE YOUR PROPERTY IN ENERGY STAR PORTFOLIO MANAGER

Step 1.1 Log in to ENERGY STAR Portfolio Manager

- Login or create a new account at https://portfoliomanager.energystar.gov/pm

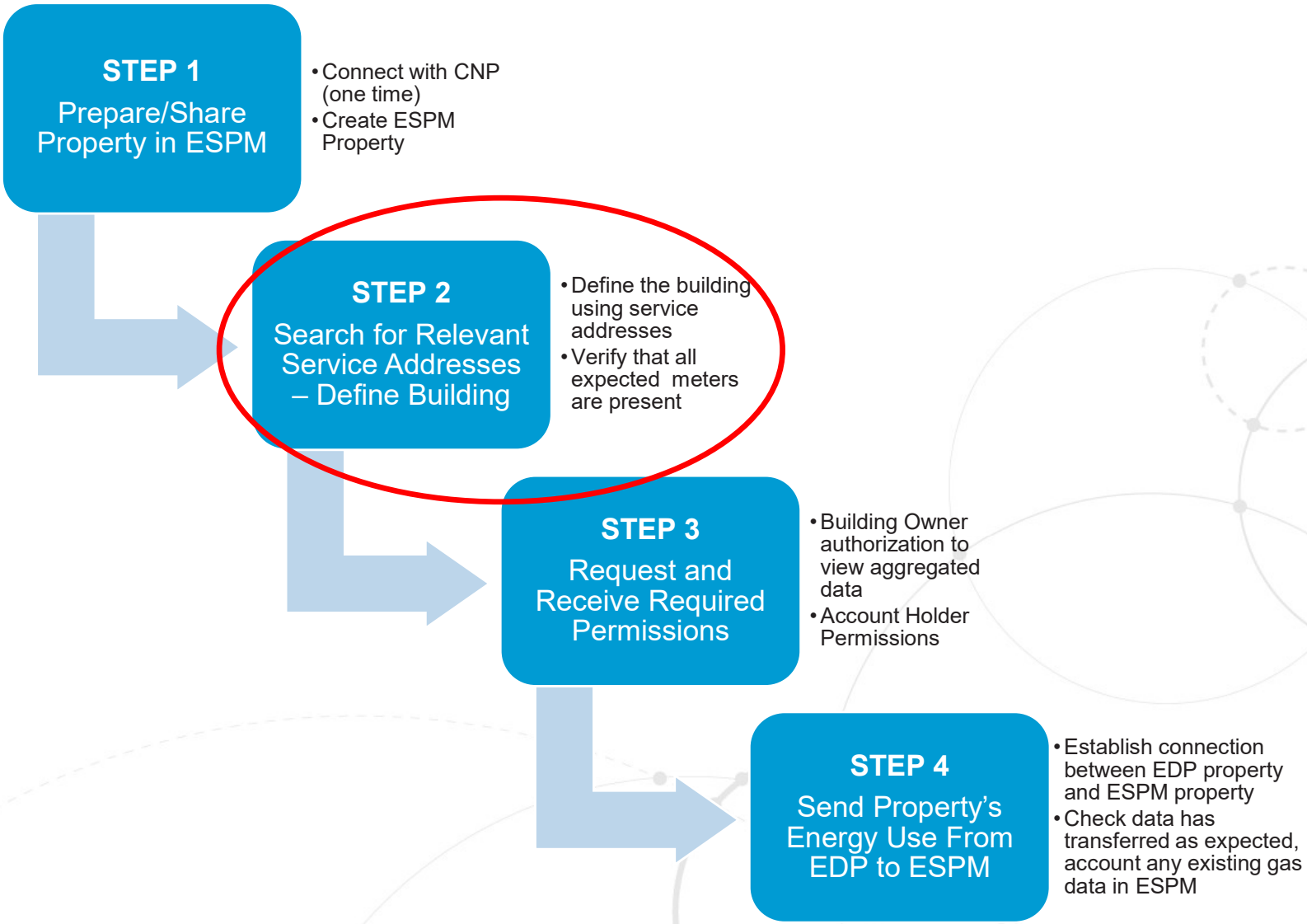
Step 1.2 Create your property in ENERGY STAR Portfolio Manager®

- If you have not previously benchmarked, set up your property in ENERGY STAR Portfolio Manager®, instructions can be found at:

https://www.energystar.gov/buildings/tools-and-resources/how_set_your_property_portfolio_manager

Helpful Hint - You do NOT need to set up gas meters as these will be automatically created when you send the data to ENERGY STAR Portfolio Manager®.

PROCESS OVERVIEW

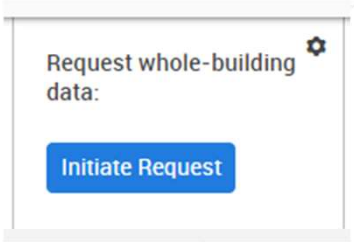


STEP 2: DEFINE BUILDING

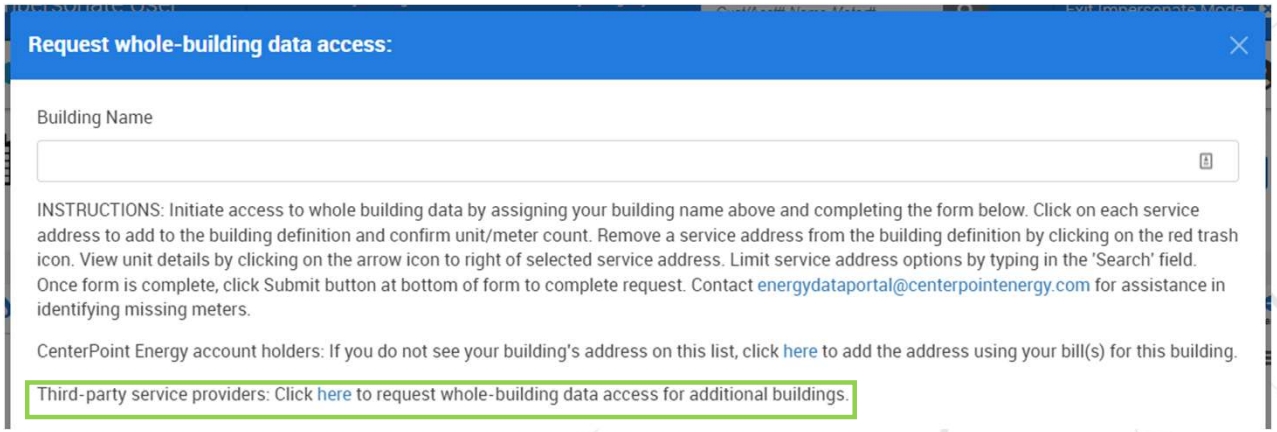
- **Step 2.1 Gather Required Service Addresses – request information from your customers**
- *Whole building data will transfer aggregated energy use data for* **all meters** *at the selected service address(es) - including any tenant meters - and is the simplest approach for accessing data for the purposes of benchmarking ordinance compliance.*
- Buildings are defined by groups of service addresses, not by GIS data (lat/long not reliably available in our data)
  - Important for user to verify that all expected meters are present in the data
  - Buildings may comprise multiple service addresses, esp. mixed use buildings
  - Generally, there is a 1:1 relationship between accounts and meters

STEP 2: DEFINE BUILDING

- **Step 2.2: Request Whole Building Data**
- **Log into Energy Data Portal**
  - **If this is your first request for data, go to the following URL to initiate the process, an account will be created upon submitting your request: https://energydataportal.centerpointenergy.com/WholeBuilding/RequestOwnerPermission**
- **Click on 'Initiate Request' widget link:**



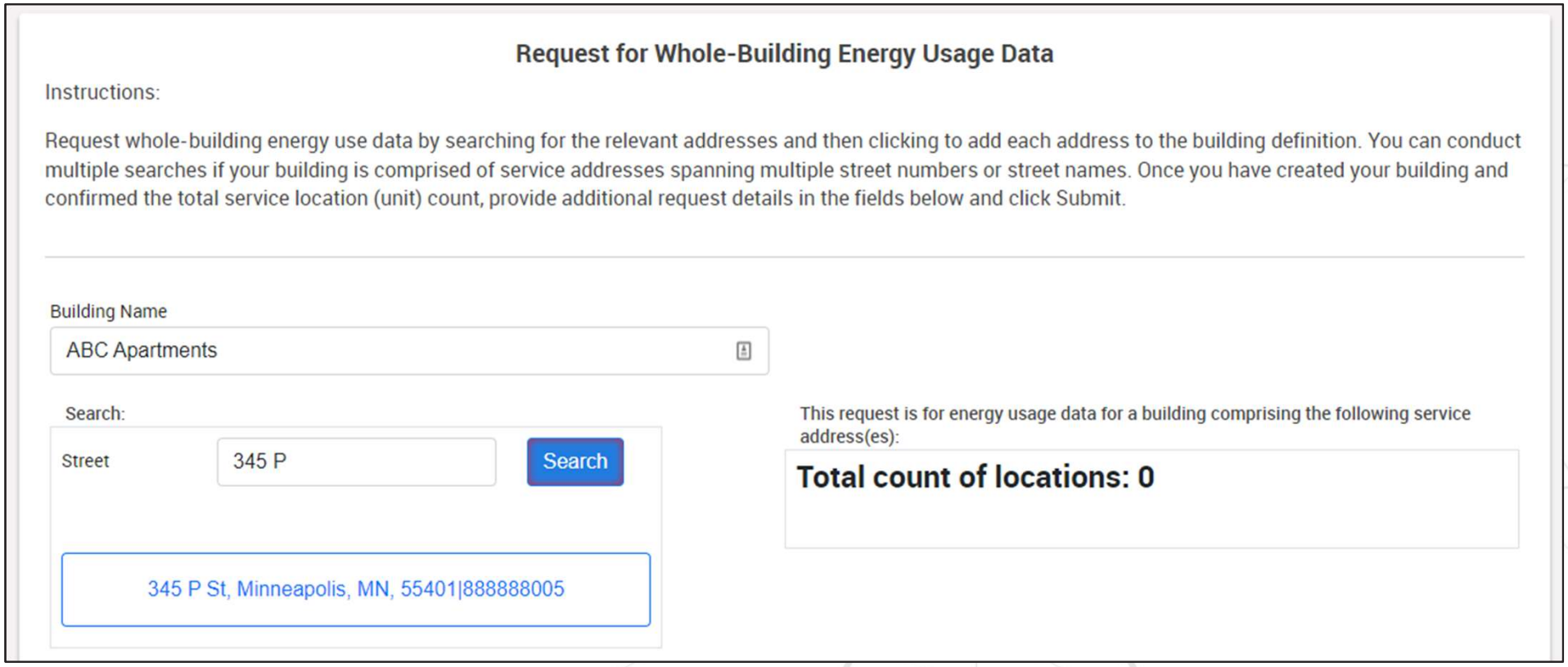
- **Click on link for 'Third-party service providers':**



Third-party service providers: Click here to request whole-building data access for additional buildings.

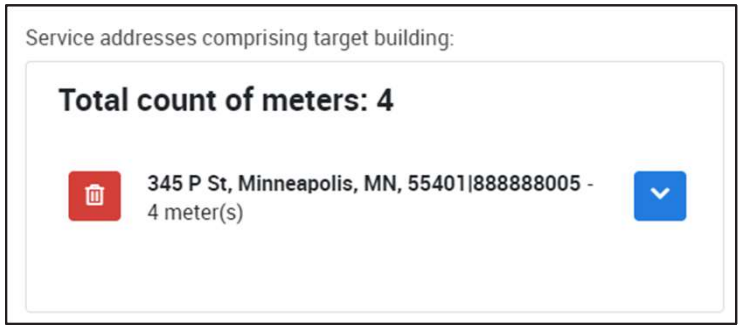
STEP 2: DEFINE BUILDING

- **Search for service address(es), click on service address to add to the building definition:**



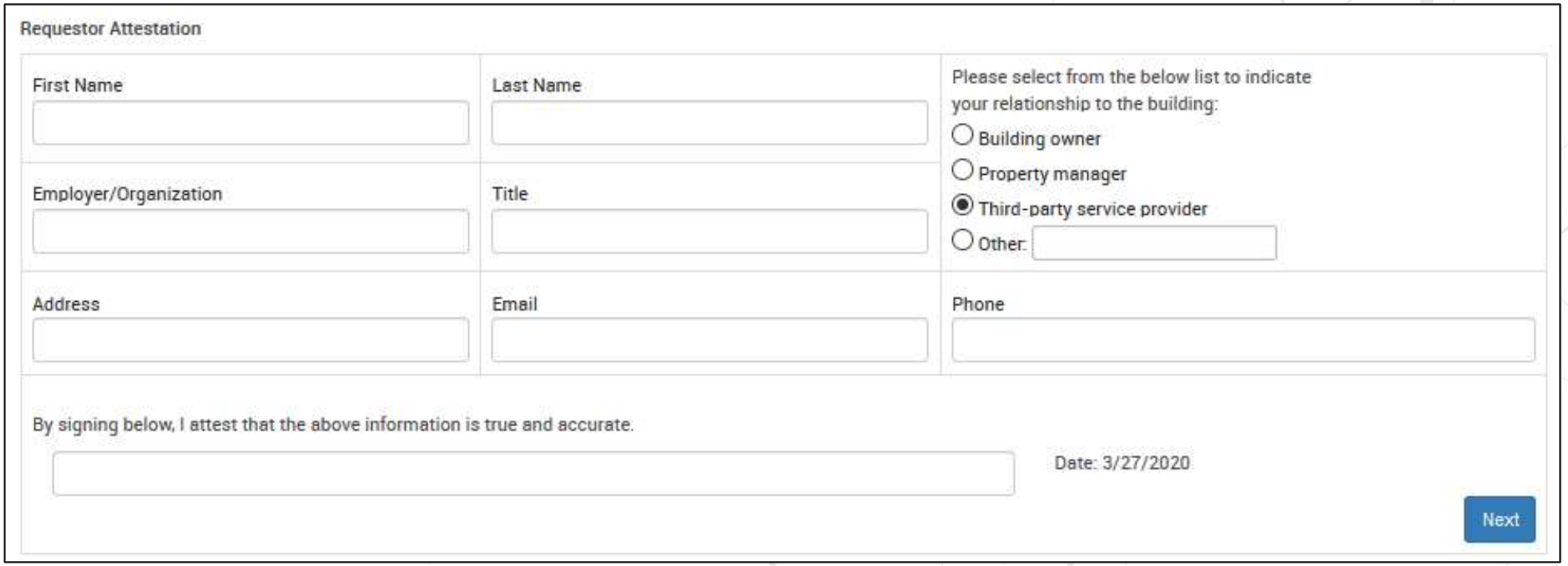
STEP 2: DEFINE BUILDING (CONTINUED)

Helpful Hint - In some cases for buildings with multiple accounts/meters, there may be more than one service address associated with a single building – please refer to your CenterPoint Energy bills to confirm relevant service addresses.



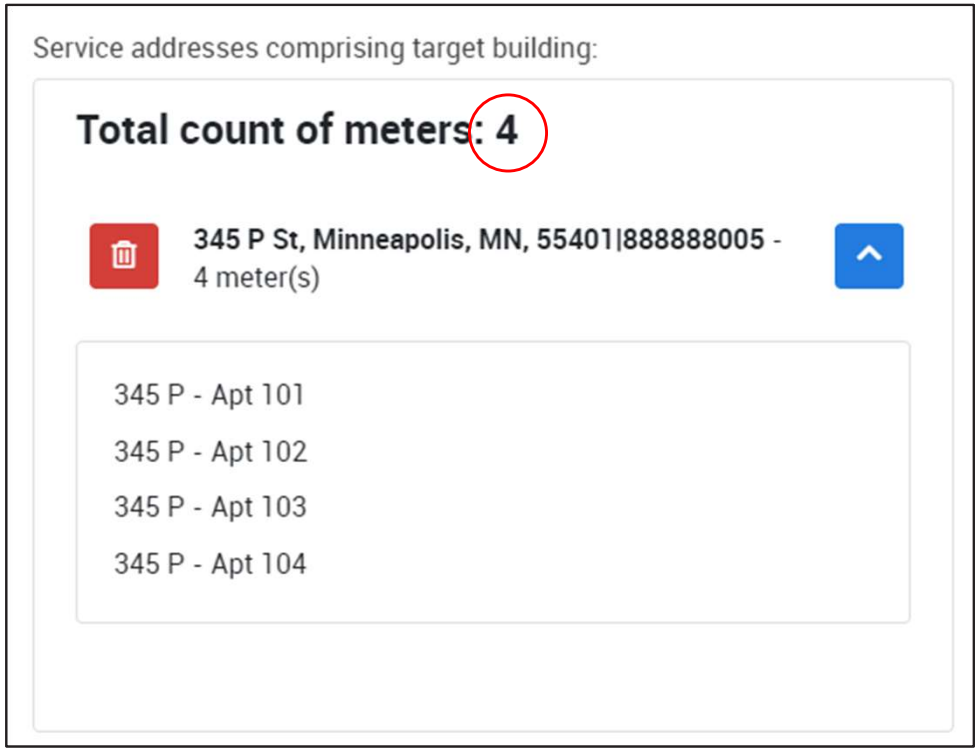
- Clicking will remove selected locations from the target list
- Clicking will show additional service address unit details

- **Provide your contact info and "attest" your relationship to the building**



STEP 2: DEFINE BUILDING

Step 2.3 Verify that all expected meters are present



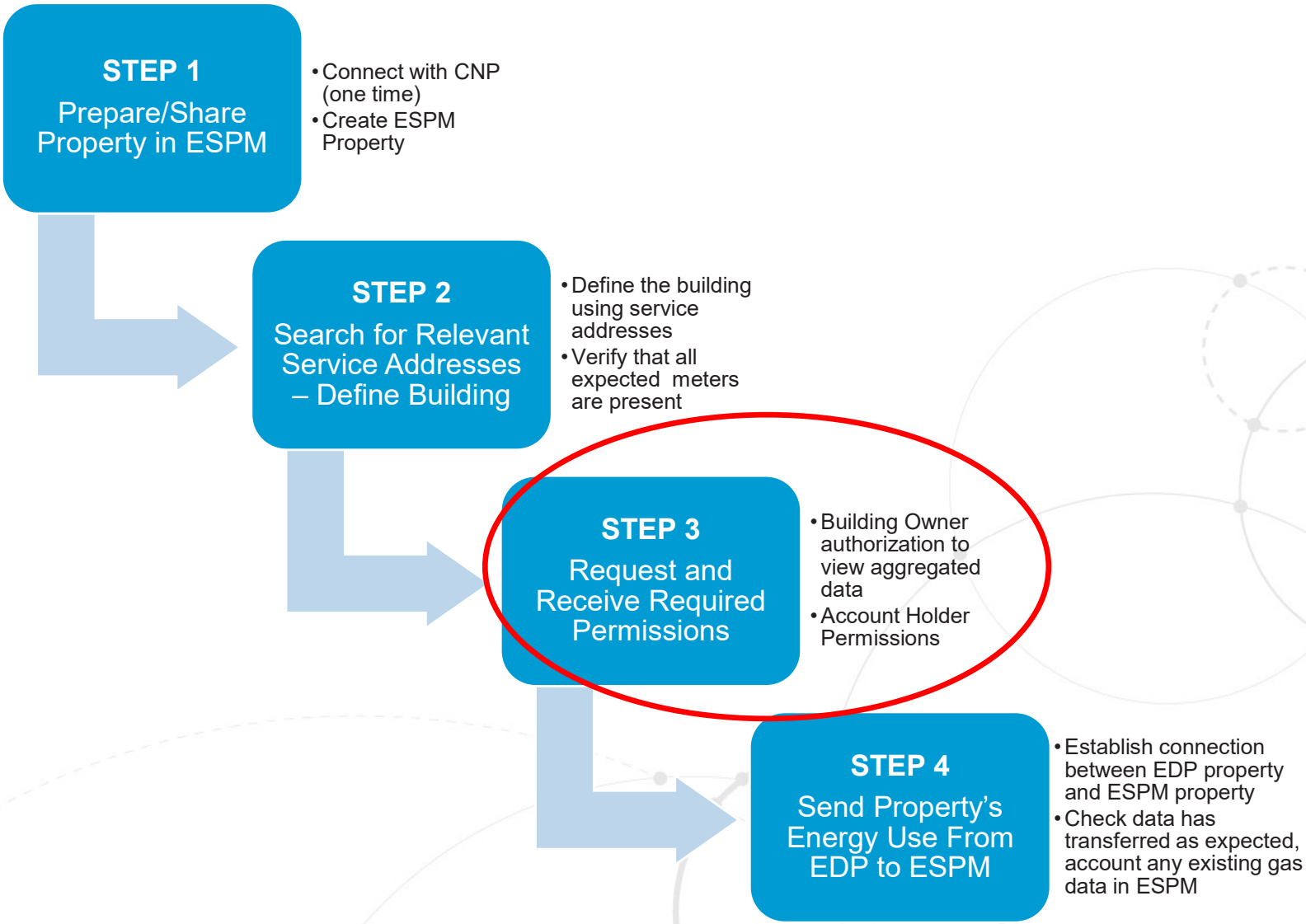
- Make sure that all expected meters (=units) are accounted for in the confirmation list

- Important for multi-family buildings, mixed use buildings and commercial real estate with multiple tenants

Helpful Hint – In some multi-tenant buildings, a meter will be shown for each individual unit or meter at a property. If you're not sure, consider: Does each unit/suite have its own gas meter (this is likely if tenants pay their own gas bill)? Or is there a master/house meter(s) for the whole building?

- Click "Submit" to complete the whole-building data access request

PROCESS OVERVIEW



STEP 3: REQUEST AND RECEIVE PERMISSIONS

Background

- CenterPoint Energy Policies:

(A) Data Release Policy – WHO we will release aggregated data to

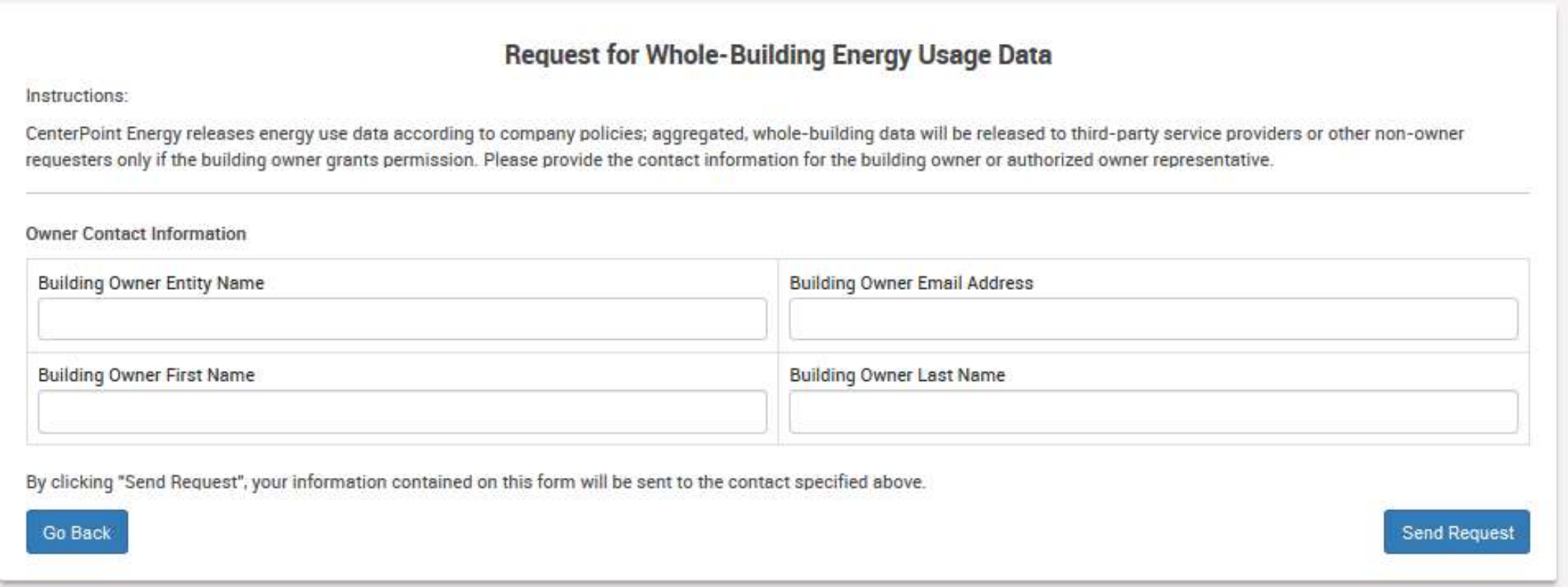
- Third Parties without relationship to building need permission from building owner
  - OWNER AUTHORIZATION FORM
- You must request Building Owner Authorization to receive aggregated data – ALWAYS Required, for each building

(B) Data Aggregation Threshold

- 4/50 rule
- If 4/50 rule not satisfied, consent is needed from account holder to release data
- Applied at monthly level
- Consent is needed from *current* account holder
  - CONSENT TO DISCLOSE UTILITY CUSTOMER DATA FORM
- You must request consent from account holders if needed – may be same contact as building owner (if that is the case, your contact would receive two separate emails, one for the Authorization to release the aggregated data, and another for their consent for their account-level data)

STEP 3: REQUEST AND RECEIVE PERMISSIONS

- **Step 3.1 (A) Send Requests: Whole-Building Energy Use Data (REQUIRED)**
- You must request Building Owner Authorization to receive aggregated data – ALWAYS Required, for each building



Request for Whole-Building Energy Usage Data

Instructions:

CenterPoint Energy releases energy use data according to company policies; aggregated, whole-building data will be released to third-party service providers or other non-owner requesters only if the building owner grants permission. Please provide the contact information for the building owner or authorized owner representative.

Owner Contact Information

Building Owner Entity Name	Building Owner Email Address
Building Owner First Name	Building Owner Last Name

By clicking "Send Request", your information contained on this form will be sent to the contact specified above.

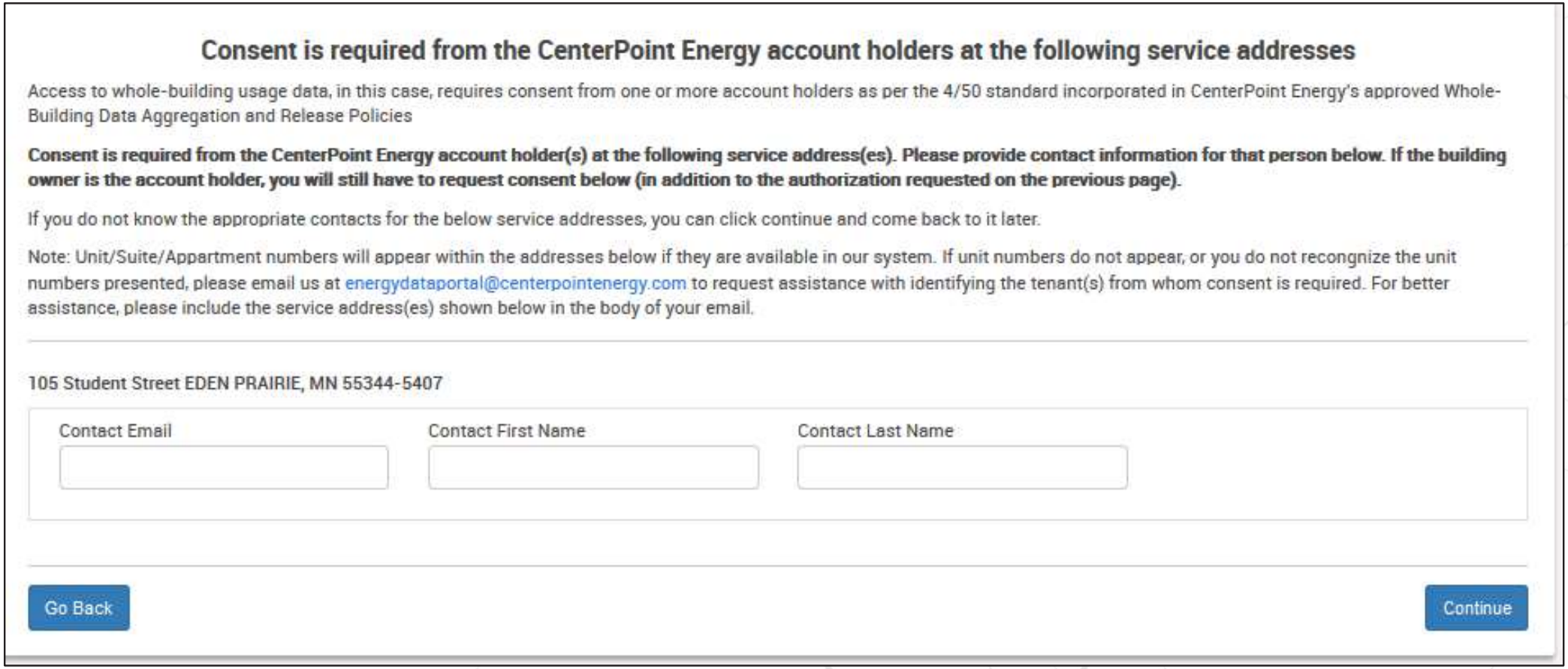
Go Back

Send Request

STEP 3: REQUEST AND RECEIVE PERMISSIONS

Step 3.1 (B) Send Requests: Account Holder Consent (ONLY IF NEEDED)

- You must request consent from account holders if needed – may be same contact as building owner (if that is the case, your contact would receive two separate emails, one for the Authorization to release the aggregated data, and another for their consent for their account-level data)



STEP 3: REQUEST AND RECEIVE PERMISSIONS

- Step 3.2 Receive emails with links to required forms

(A) Owner Authorization Request Email

Energy Data Portal

Owner Permission Request

Hello, Emma-testq Ingebretsen-test

You are receiving this email because an individual is requesting access to your building's energy use data through the Energy Data portal from CenterPoint Energy. The user has identified you a this request.

REQUEST DETAILS

Request from:	Emma-Test ingebretsen-test
Email:	mn-naturalgasenergyanalysis@centerpointenergy.com
Employer:	CenterPoint-Test
Title:	test
Building:	Example Apartment Building
Address:	123 Apartment Lane, St Louis Park, MN, 55416-2448|888880009, 104 Student Street, Eden Prairie, MN, 55344-5407|888880005

The requester is seeking your permission as an authorized agent to grant access to aggregated whole-building monthly gas usage.

INSTRUCTIONS

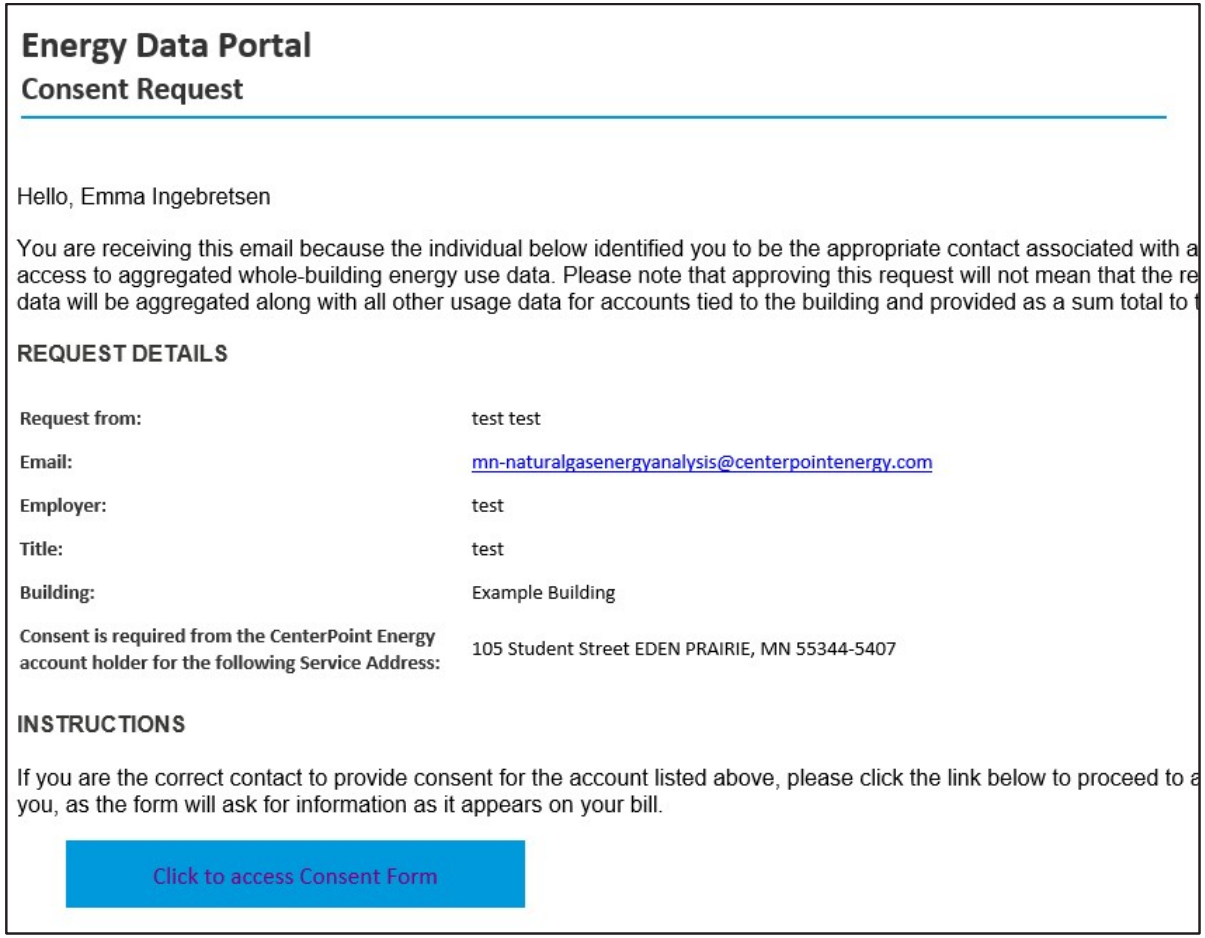
If you are the building owner or the building owner's authorized agent, please click the link below to proceed to an online form to complete the authorization process.

Click to access Authorization Form

STEP 3: REQUEST AND RECEIVE PERMISSIONS

- 3.2 Receive emails with links to required forms

(B) Consent request email



Energy Data Portal

Consent Request

Hello, Emma Ingebretsen

You are receiving this email because the individual below identified you to be the appropriate contact associated with a
access to aggregated whole-building energy use data. Please note that approving this request will not mean that the re
data will be aggregated along with all other usage data for accounts tied to the building and provided as a sum total to t

REQUEST DETAILS

Request from:	test test
Email:	mn-naturalgasenergyanalysis@centerpointenergy.com
Employer:	test
Title:	test
Building:	Example Building
Consent is required from the CenterPoint Energy account holder for the following Service Address:	105 Student Street EDEN PRAIRIE, MN 55344-5407

INSTRUCTIONS

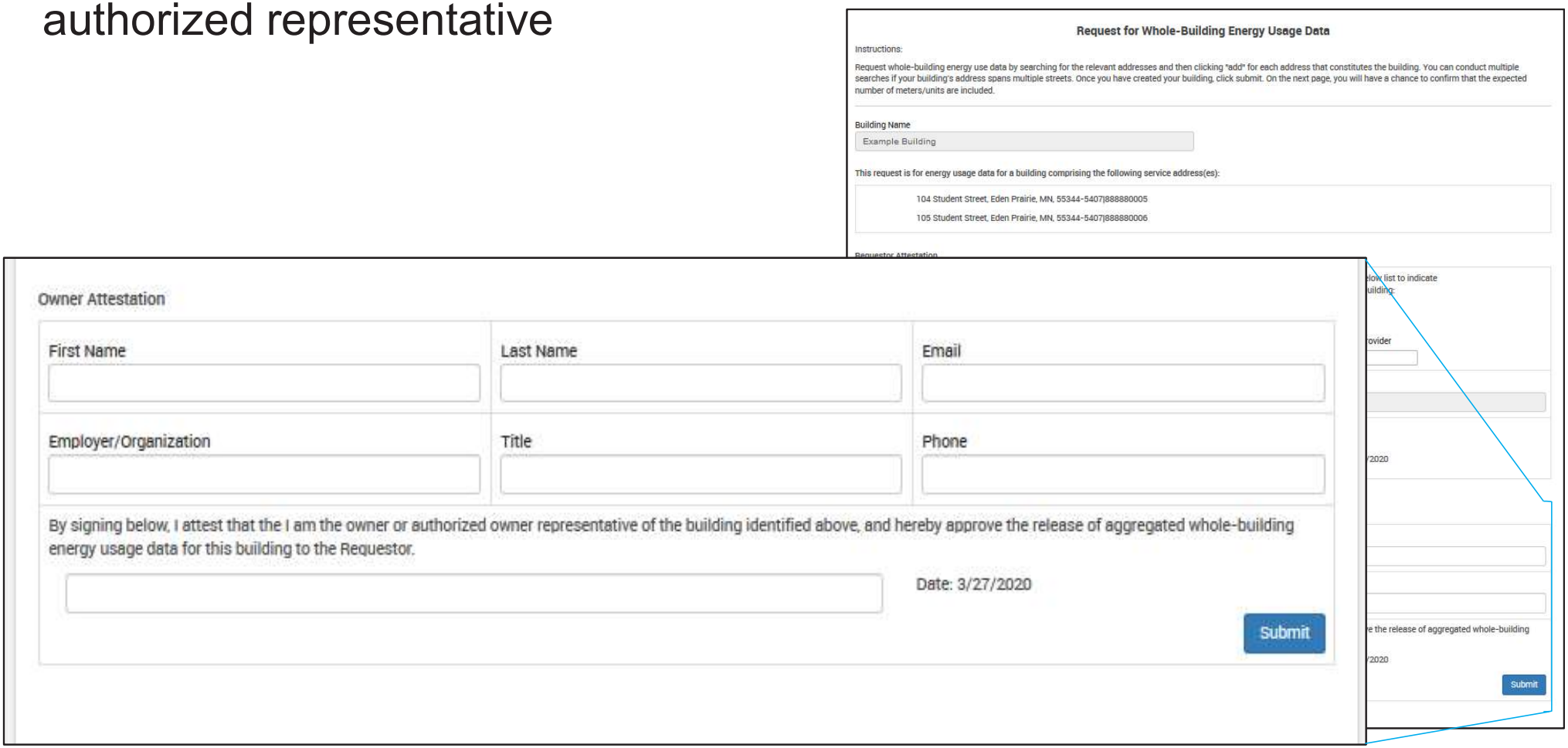
If you are the correct contact to provide consent for the account listed above, please click the link below to proceed to a
you, as the form will ask for information as it appears on your bill.

Click to access Consent Form

STEP 3: REQUEST AND RECEIVE PERMISSIONS

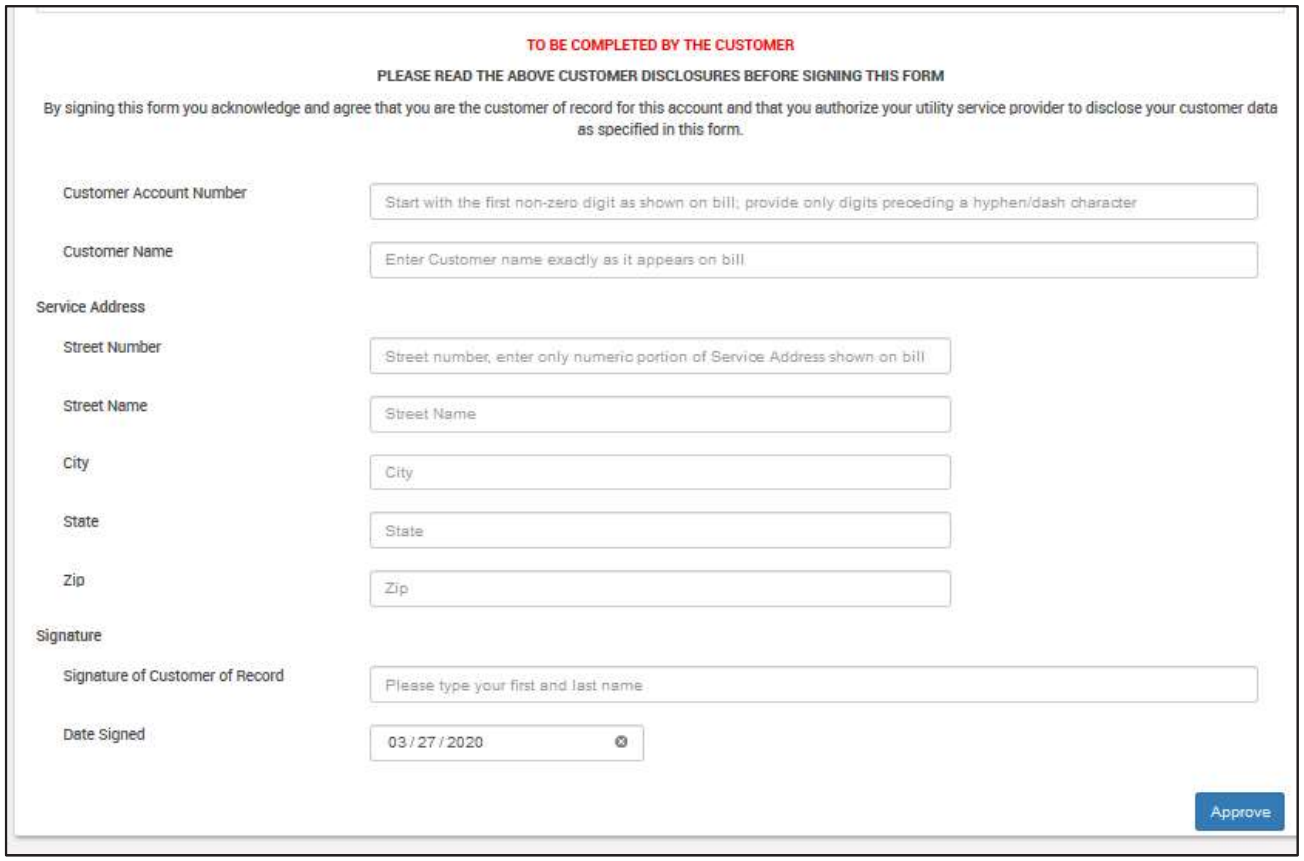
- 3.3 Contacts fill out required forms (from links in emails)

(A) Owner Authorization Form – to be Filled out by owner or their authorized representative



STEP 3: REQUEST AND RECEIVE PERMISSIONS

- 3.3 Contacts fill out required forms (from links in emails)
- (B) Consent to Disclose Utility Customer Data Form
- Completed by customer of record for the account at the provided address – requires information from Customer Bill



TO BE COMPLETED BY THE CUSTOMER

PLEASE READ THE ABOVE CUSTOMER DISCLOSURES BEFORE SIGNING THIS FORM

By signing this form you acknowledge and agree that you are the customer of record for this account and that you authorize your utility service provider to disclose your customer data as specified in this form.

Customer Account Number — Start with the first non-zero digit as shown on bill; provide only digits preceding a hyphen/dash character

Customer Name — Enter Customer name exactly as it appears on bill

Service Address

Street Number — Street number, enter only numeric portion of Service Address shown on bill

Street Name — Street Name

City — City

State — State

Zip — Zip

Signature

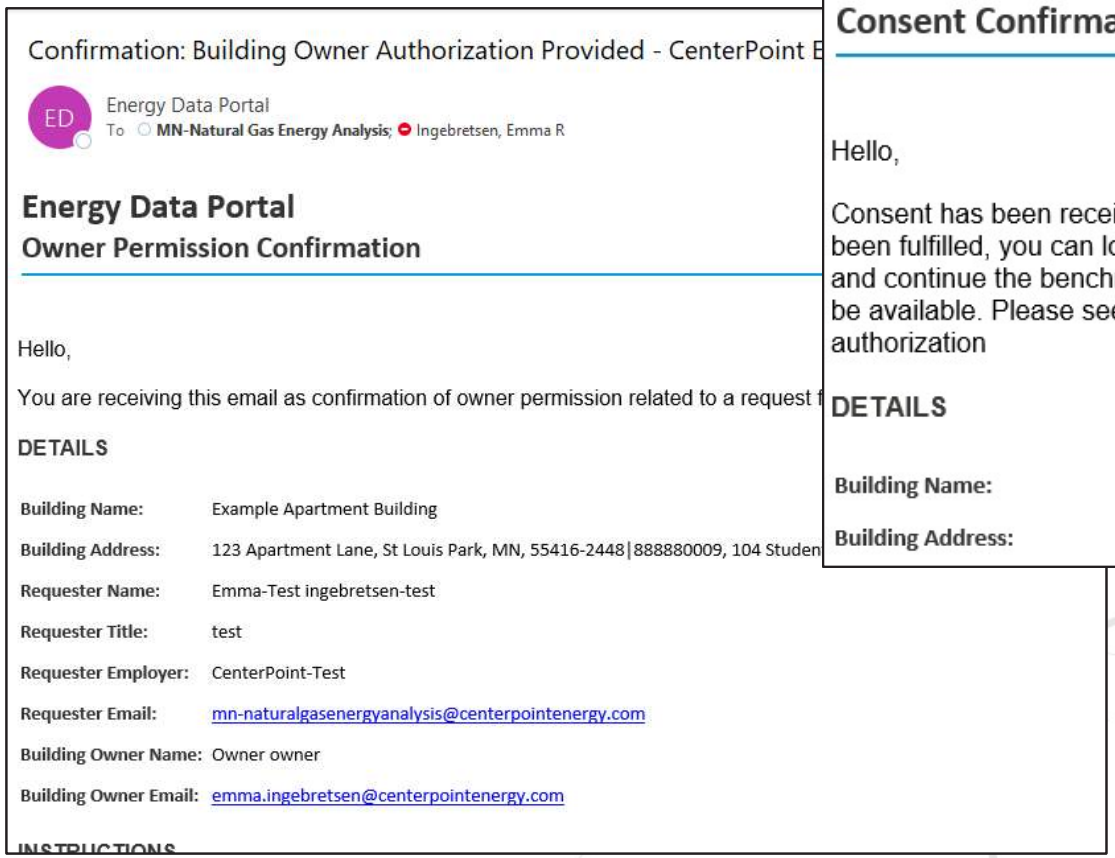
Signature of Customer of Record — Please type your first and last name

Date Signed — 03/27/2020

Approve

STEP 3: REQUEST AND RECEIVE PERMISSIONS

- **Step 3.3 When your contact(s) successfully fill out the forms, you will receive confirmation emails**



Confirmation: Building Owner Authorization Provided - CenterPoint E

ED Energy Data Portal
To MN-Natural Gas Energy Analysis; Ingebretsen, Emma R

Energy Data Portal
Owner Permission Confirmation

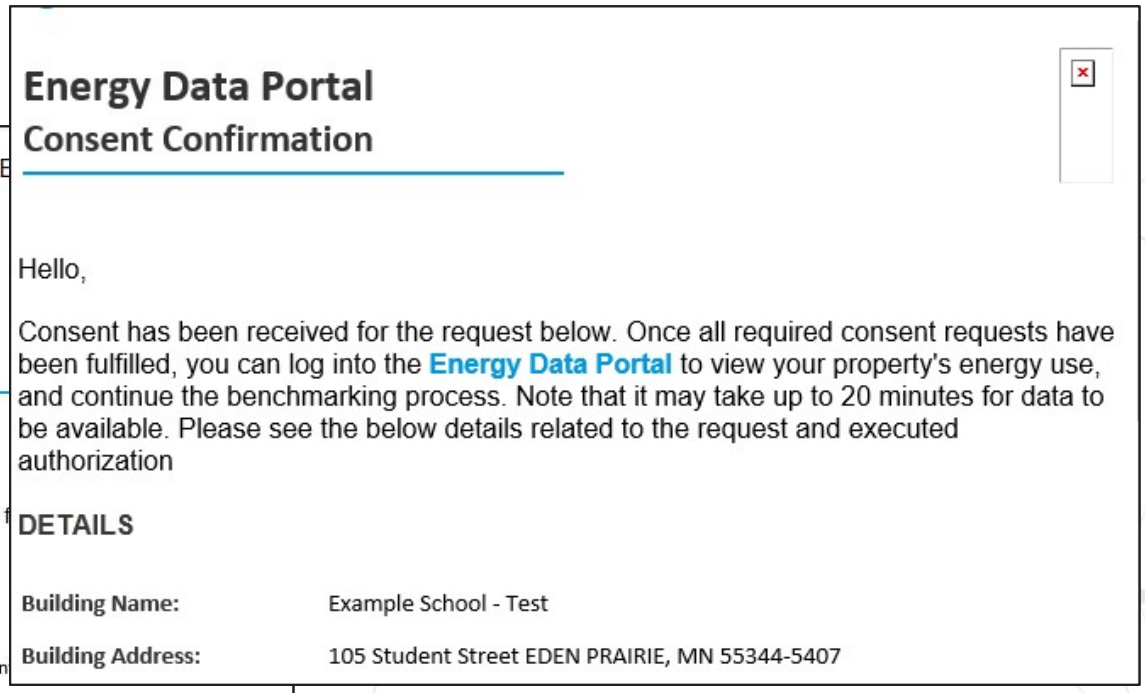
Hello,

You are receiving this email as confirmation of owner permission related to a request f

DETAILS

Building Name:	Example Apartment Building
Building Address:	123 Apartment Lane, St Louis Park, MN, 55416-2448|888880009, 104 Studen
Requester Name:	Emma-Test ingebretsen-test
Requester Title:	test
Requester Employer:	CenterPoint-Test
Requester Email:	mn-naturalgasenergyanalysis@centerpointenergy.com
Building Owner Name:	Owner owner
Building Owner Email:	emma.ingebretsen@centerpointenergy.com

INSTRUCTIONS



Energy Data Portal
Consent Confirmation

Hello,

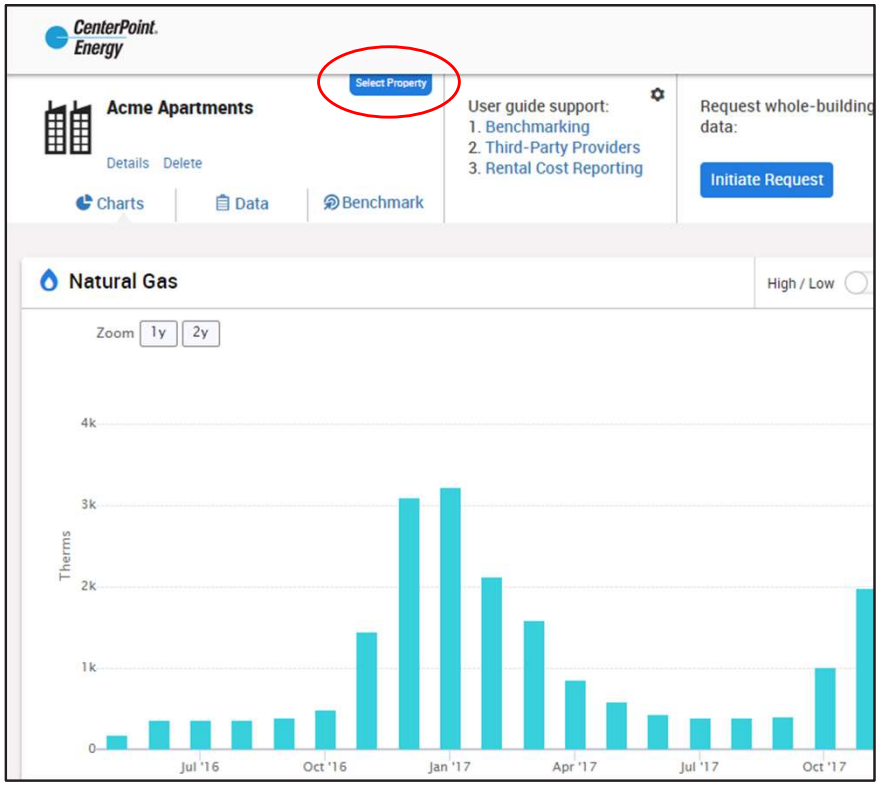
Consent has been received for the request below. Once all required consent requests have been fulfilled, you can log into the **Energy Data Portal** to view your property's energy use, and continue the benchmarking process. Note that it may take up to 20 minutes for data to be available. Please see the below details related to the request and executed authorization

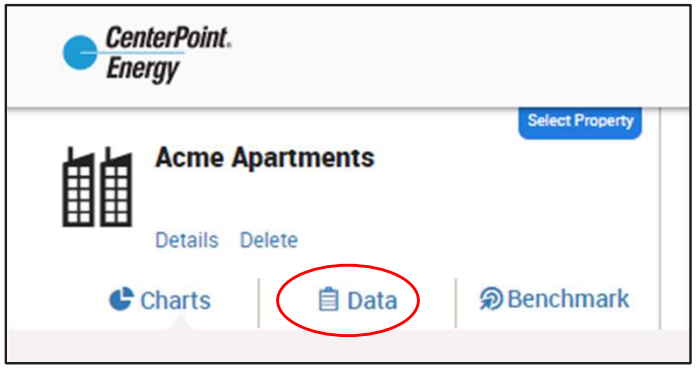
DETAILS

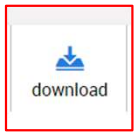
Building Name:	Example School - Test
Building Address:	105 Student Street EDEN PRAIRIE, MN 55344-5407

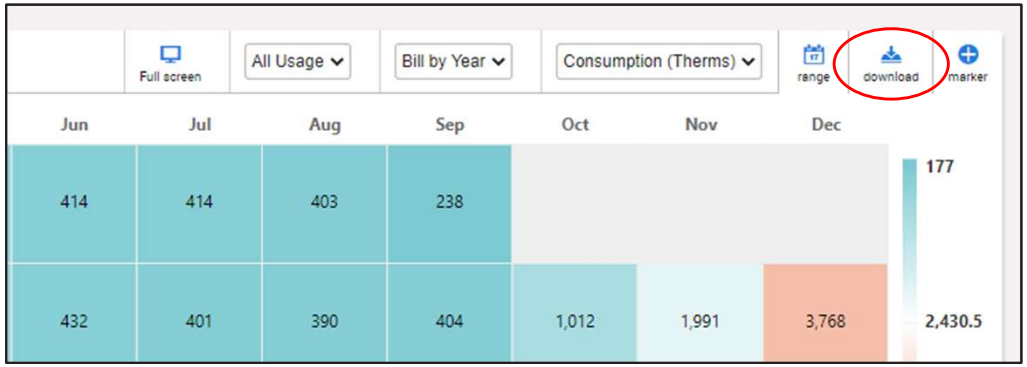
STEP 3: REQUEST AND RECEIVE PERMISSIONS

- Once all forms have been completed, you will be able to access the energy use data by logging into the **Energy Data Portal** and selecting your building in the “select property” list
- To download the energy use data to a .CSV file, click on the data tab, then click on download

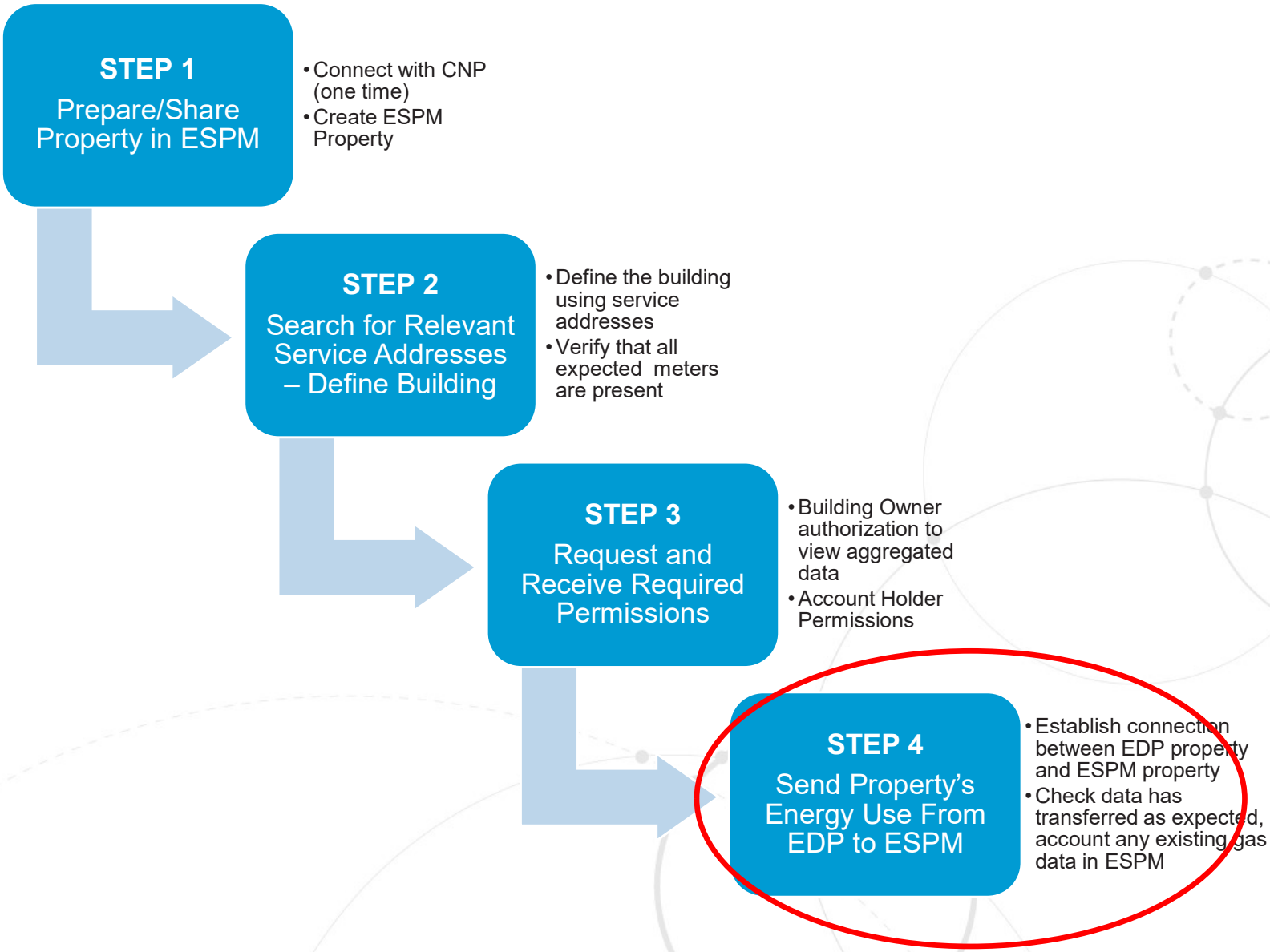








PROCESS OVERVIEW



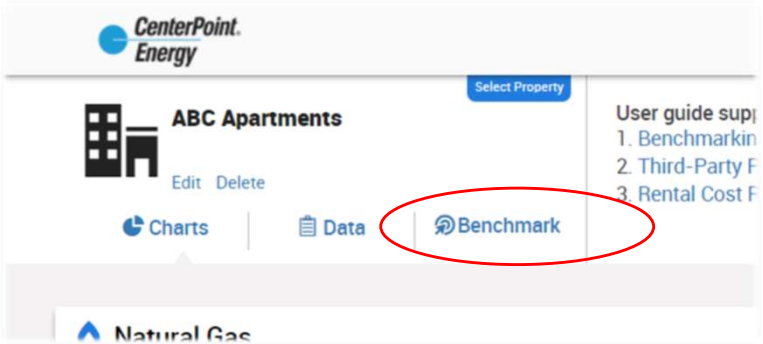
STEP 4: SEND YOUR PROPERTY ENERGY USE DATA TO ENERGY STAR PORTFOLIO MANAGER®

Step 4: Send Data from EDP to ESPM

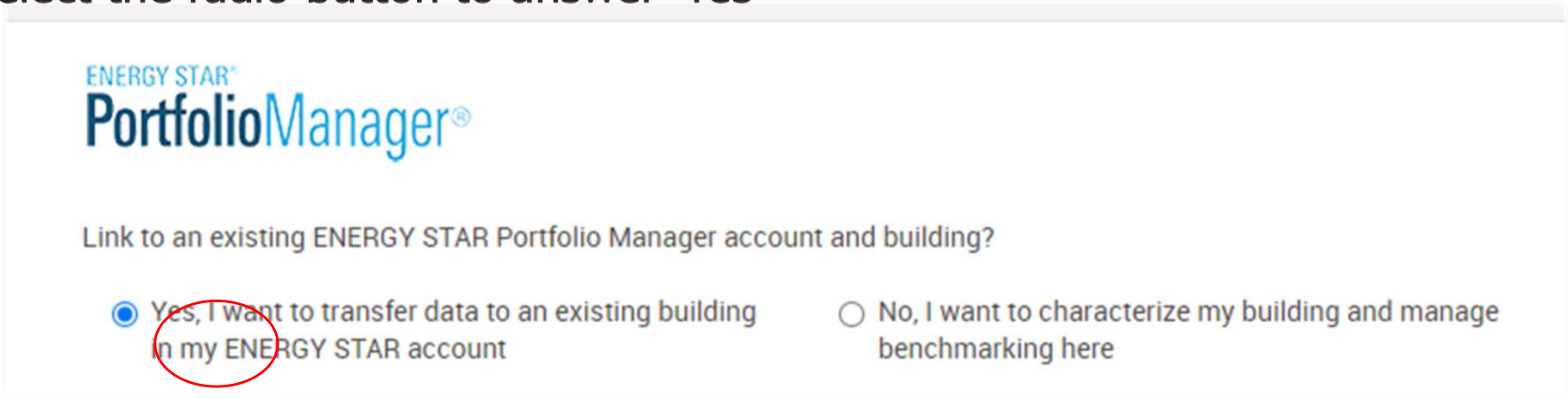
In order to transfer monthly billing data from the EDP you must first establish a connection between your Energy Star Portfolio Manager (ESPM) account and CenterPoint Energy's web services account on ESPM. After the connection is in place you will be able to share your ESPM Property with the EDP and initiate automated data transfer

Step 4.1 Initiate connection to your ESPM account

- Select Benchmark from the EDP dashboard



- Select the radio button to answer 'Yes'



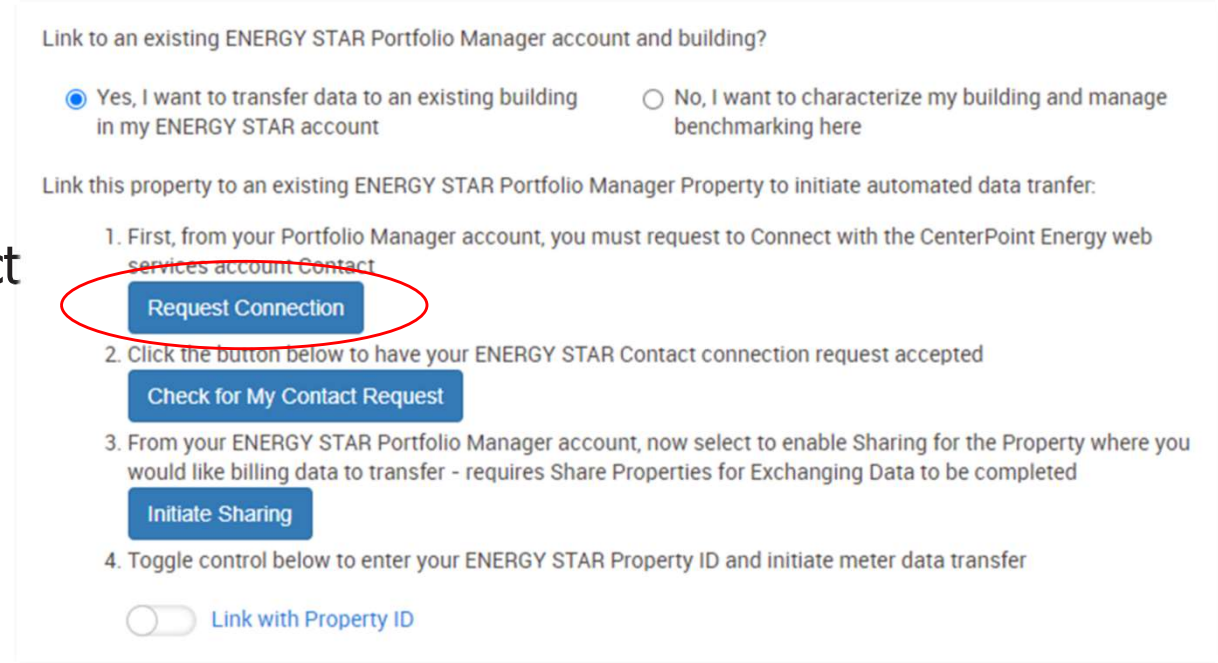
STEP 4: SEND YOUR PROPERTY ENERGY USE DATA TO ENERGY STAR PORTFOLIO MANAGER®

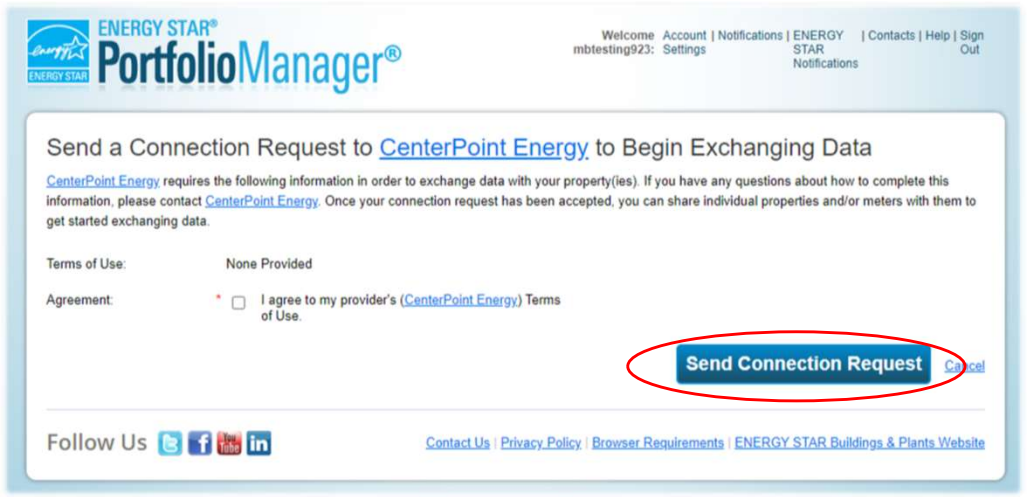
Step 4.2 Send and check for Contact connection request

- Click on the 'Request Connection' button to link to the EDP's Contact page on the ENERGY STAR web site (opens as a new tab on your web browser)

Helpful Hint - In the case that you are not currently logged on to the ESPM site, you may first be prompted to enter your username and password before you are transferred to the Contact connection page.

- Click on the 'Send Connection Request' button

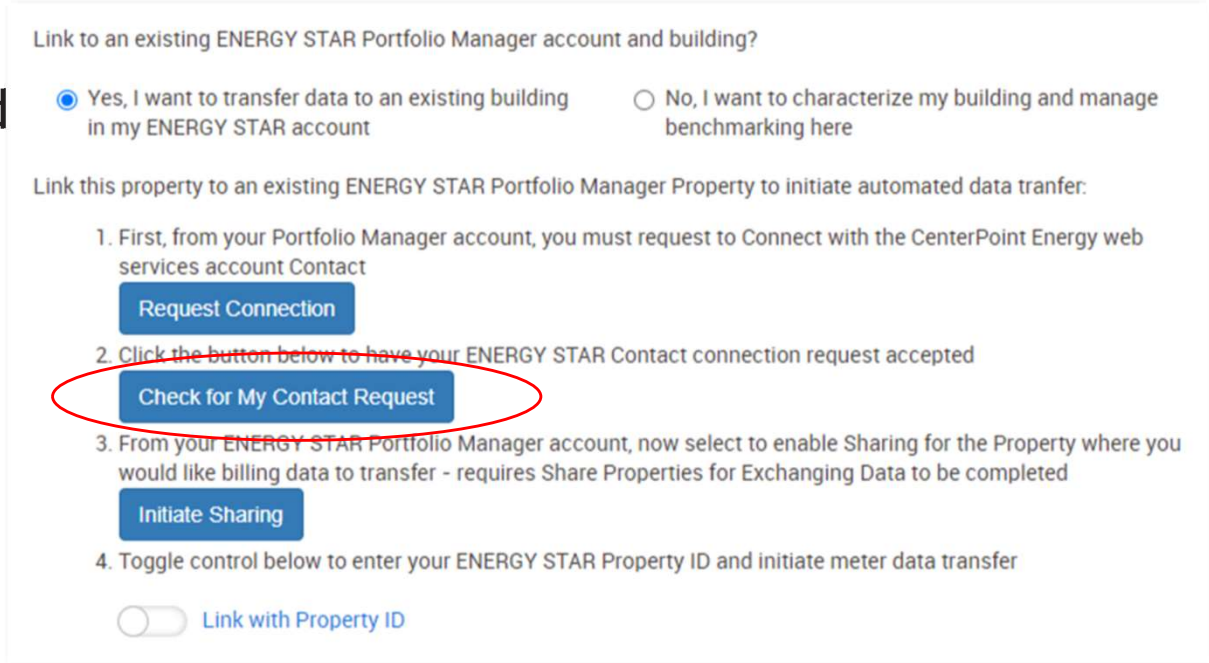




STEP 4: SEND YOUR PROPERTY ENERGY USE DATA TO ENERGY STAR PORTFOLIO MANAGER®

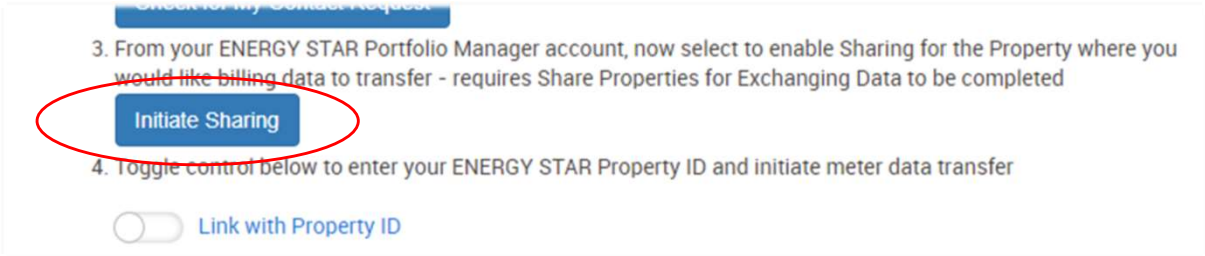
- Return to the EDP (by selecting the tab on your web browser) and click on the 'Check for My Contact Request' button

Helpful Hint - A green checkmark will appear to indicate that the system has accepted any submitted and pending contact connection requests.



Step 4.3 Initiate ESPM property sharing

- Click on the 'Initiate Sharing' button to link to the Share Properties for Exchanging Data page on the ENERGY STAR web site



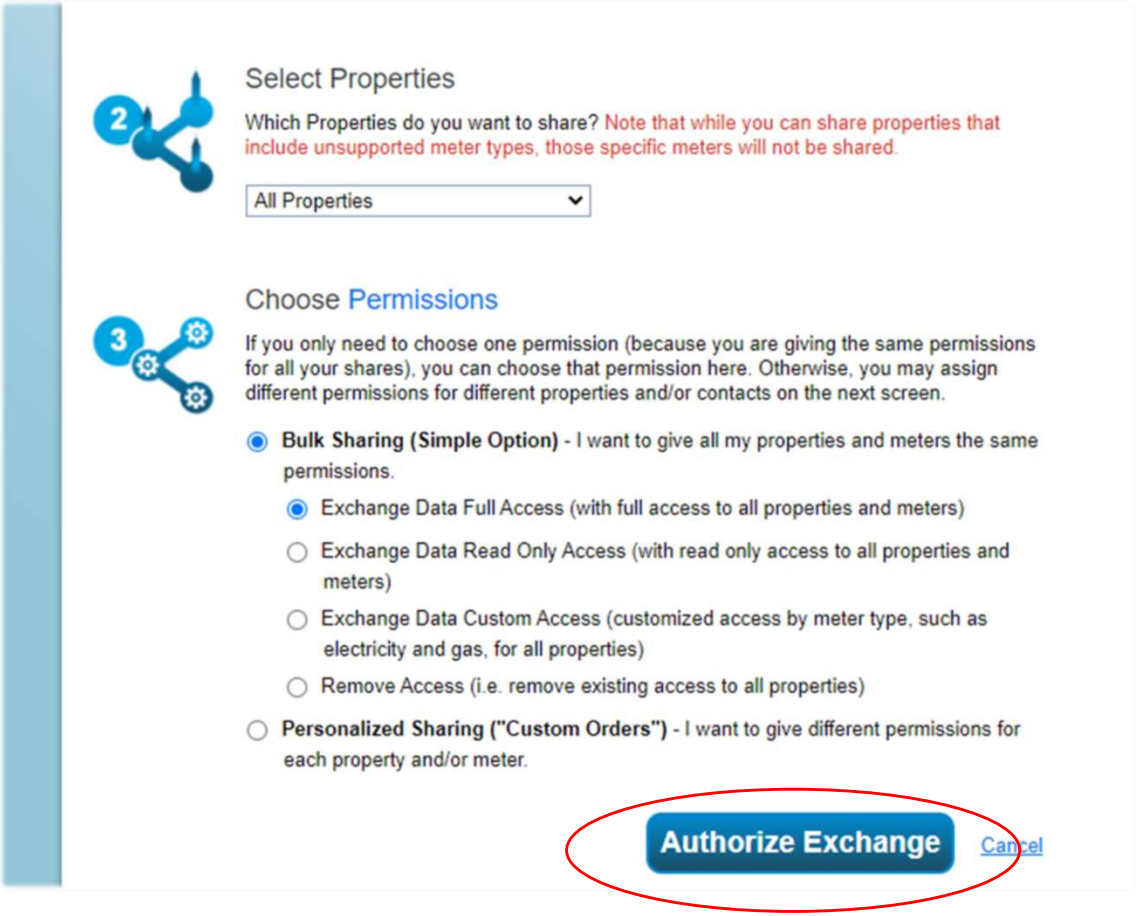
STEP 4: SEND YOUR PROPERTY ENERGY USE DATA TO ENERGY STAR PORTFOLIO MANAGER®

- Complete form to select 'One Property' or 'All Properties' to share with CenterPoint Energy

Step 4.4 Set ESPM access permissions

Helpful Hint - The easiest option to ensure successful data transfer is to opt for 'Bulk Sharing' and assign 'Exchange Data Full Access' permission.

Custom settings may be applied if desired. At a minimum, the CenterPoint Energy contact needs to be assigned 'Exchange Data Full Access' permission to Natural Gas Energy Meters and Property Information in order to transfer data to ESPM.

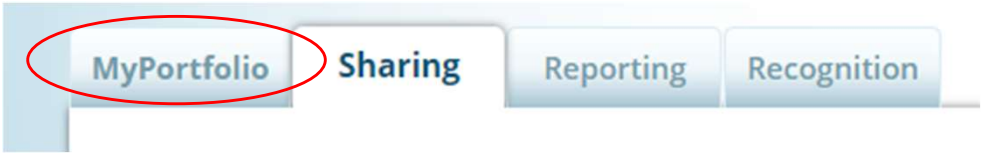


- Click the 'Authorize Exchange' button to complete the sharing process

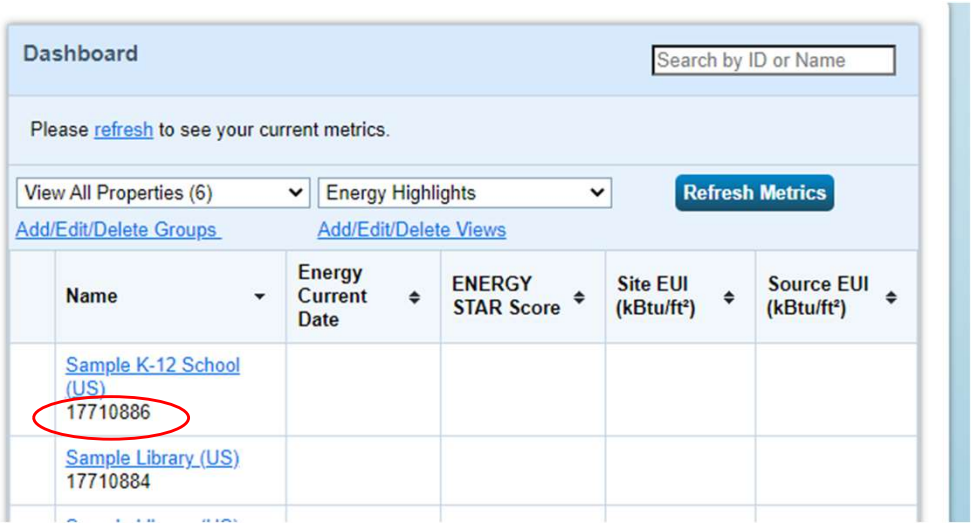
STEP 4: SEND YOUR PROPERTY ENERGY USE DATA TO ENERGY STAR PORTFOLIO MANAGER®

Step 4.5 Link ESPM Property ID to EDP property

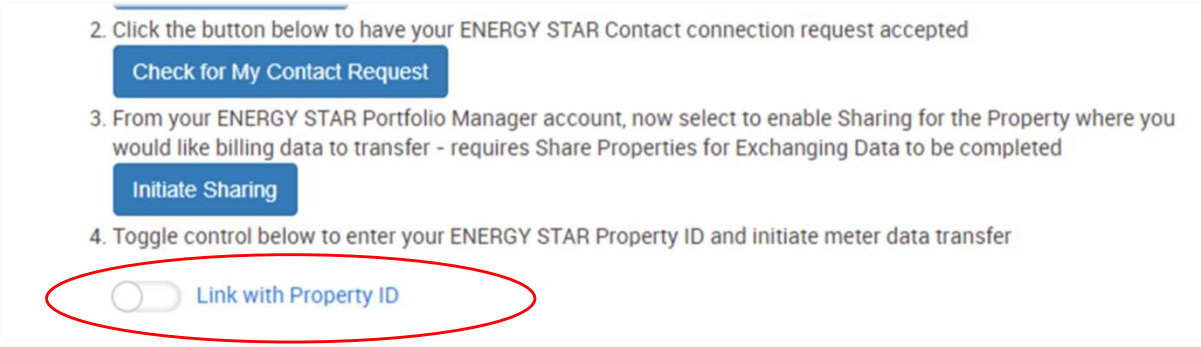
- Click on the 'MyPortfolio' tab to view your ESPM building list



- Find and copy the Property ID for the ESPM property you are trying to link to your EDP property

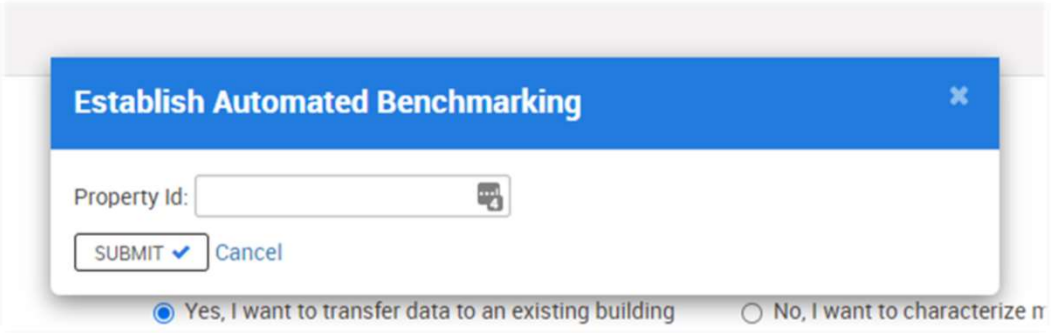


- Return to the EDP and toggle the 'Link with Property ID' slider control

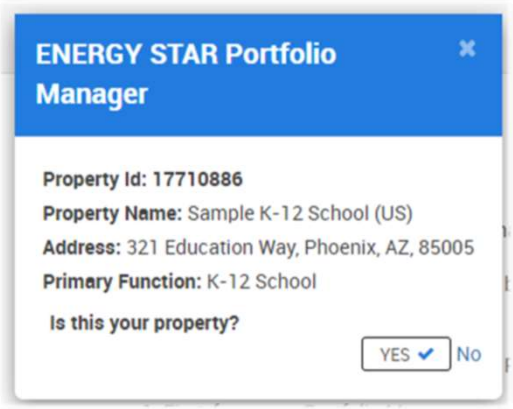


STEP 4: SEND YOUR PROPERTY ENERGY USE DATA TO ENERGY STAR PORTFOLIO MANAGER®

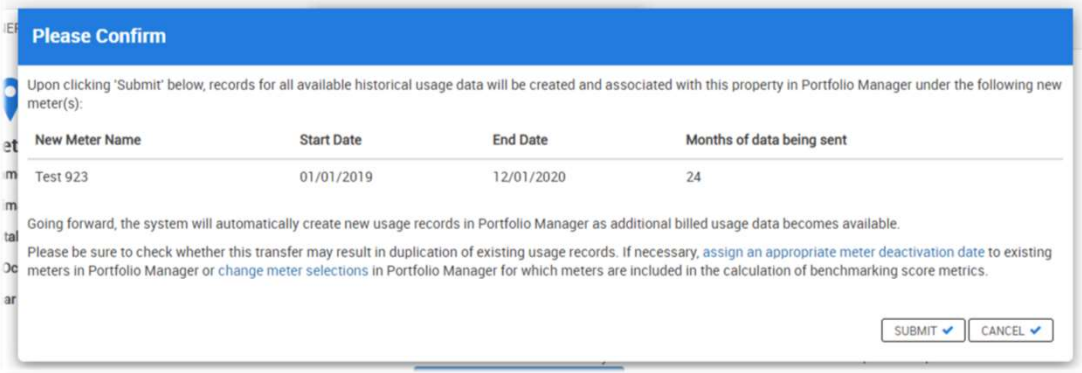
- Enter your building's ESPM Property ID and click 'Submit'



- Confirm your property's information and click 'Yes'



- Confirm the meter data to be transferred and click 'Submit' to initiate data transfer process

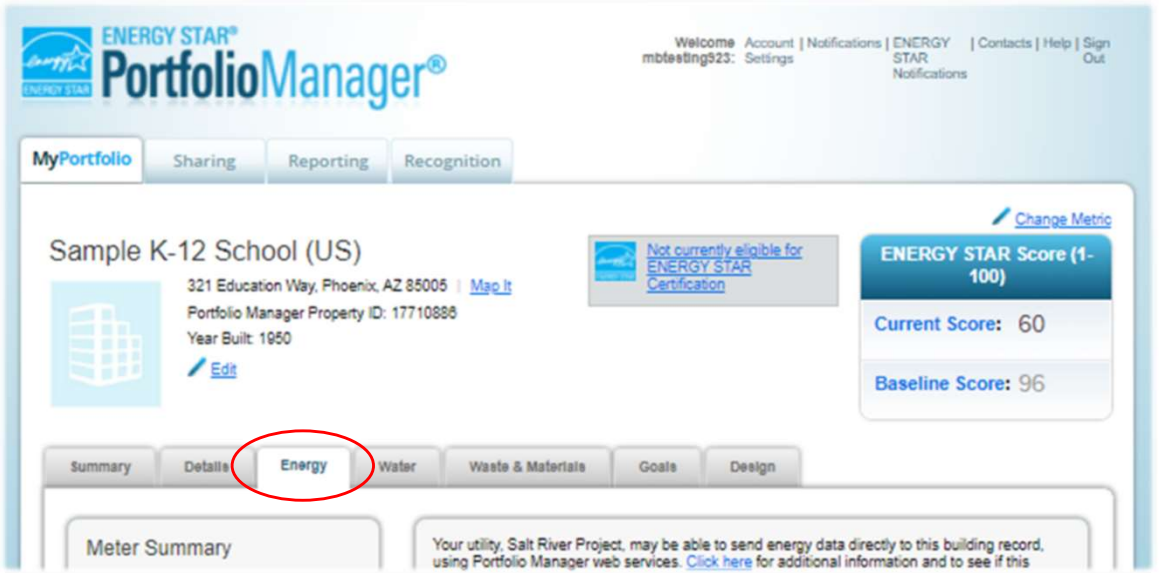


Congratulations! You have now established ongoing automated data transfer to ESPM to facilitate your building benchmarking.

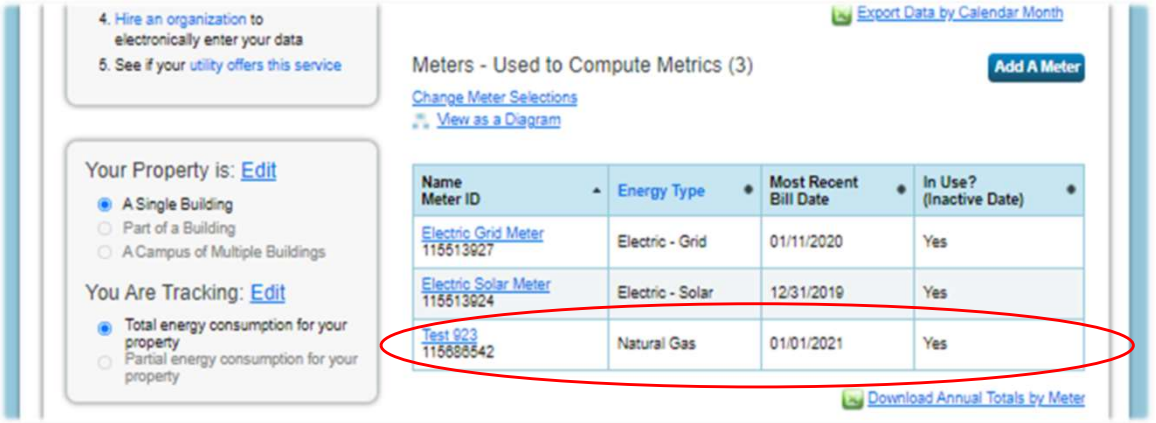
STEP 4: SEND YOUR PROPERTY ENERGY USE DATA TO ENERGY STAR PORTFOLIO MANAGER®

Step 4.6 Confirm data transfer to ESPM

- Return to your ESPM account and select your target property from the MyPortfolio dashboard



- Select the 'Energy' tab for your property to confirm that the new EDP meter is showing with recent bill information in the 'Meters' table



Helpful Hint - In the case that your CenterPoint Energy account billed natural gas usage had been previously entered manually on a separate ESPM natural gas meter, because the EDP will transfer a full history of billing data it may be necessary to use the 'Change Meter Selections' to only include the new EDP meter and avoid double entry of historical usage.

CenterPoint Energy

TROUBLESHOOTING

FAQ FOR PREPARING PROPERTIES IN ESPM

Problem	Solution
CenterPoint Energy has not accepted my CONTACT request.	Please allow up to 24 hours for your CONTACT request to be accepted.
CenterPoint Energy has not accepted my PROPERTY SHARE request in ENERGY STAR Portfolio Manager®, what should I do?	Unlike the contact request above, you do NOT need to wait for the property share request to be accepted; you can move on immediately to the next step and your share request will be accepted automatically when you establish automated benchmarking from the Energy Data Portal in Step 4.

FAQ FOR CONSENT FORMS

Problem	Solution
The CenterPoint Energy account holder is having trouble filling out the consent form.	Check that you are using the correct information on your bills – see example bills on next page for visual guide for where to find the correct information. Check that you are following the special instructions for account authentication – see below. Street Number: Make sure there is no space after the street number

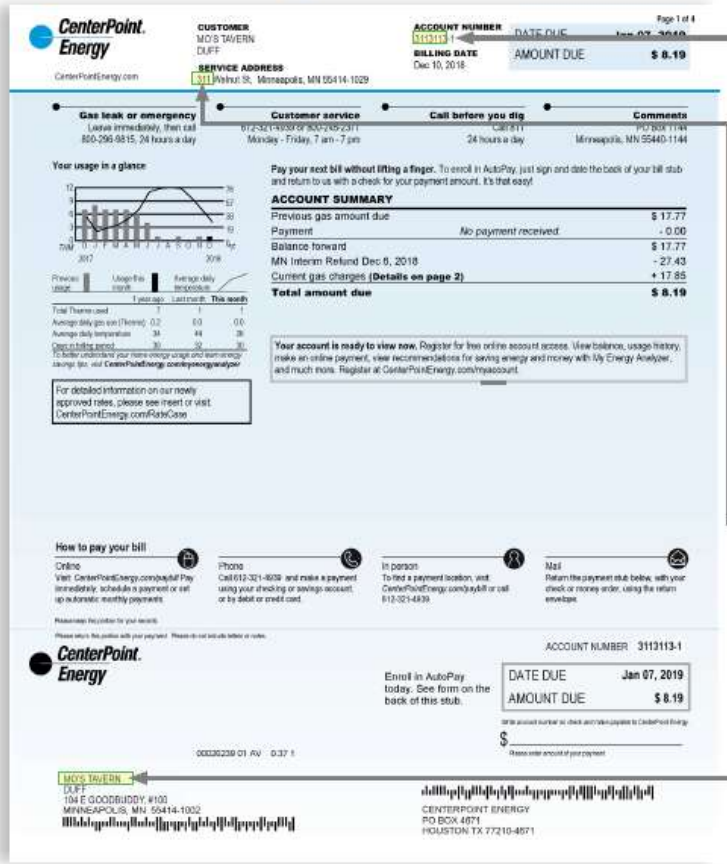
- Customer Account Number: DO NOT enter the dash or number after the dash (Example: Enter 123456 for Account Number 123456-7)
- Customer Name: Enter exact text from bill shown on the first line of the to: address.
- Street Number: Enter ONLY the numeric digits at the start of service address, no other text (Example: Enter 123 for service address 123 Main Street). Make sure there is no SPACE after the street number.

CenterPoint Energy

Energy Data Portal Account Authentication Information

Follow the guide below to locate the correct account authentication information (Account Number, Street Number, Specific Customer Name) on your CenterPoint Energy bills. CenterPoint Energy has two types of bills, shown below. First, identify which bill type you are viewing, then follow the instructions for that type of bill. Note that if you receive multiple bills from CenterPoint Energy, you may receive one or both bill types, depending on the account.

Single Account Bill



ACCOUNT NUMBER

If you receive a summary bill with **multiple accounts**, select the listed account for the service location you would like to authenticate.

IMPORTANT - Do not use the account number listed at the top of the bill (noted here with a red X). This will not connect correctly in the Energy Data Portal.

If you receive a bill with a **single account**, use the account number listed at the top of the bill for registration.

IMPORTANT - Only enter the numbers before the dash, not the dash or the number after it.

STREET NUMBER

If you receive a summary bill with **multiple accounts**, use the street number from the service address affiliated with the account number selected from the list of accounts.

IMPORTANT - Do not use the street number/service address listed in the mailing address. This may not connect correctly in the Energy Data Portal Tool.

If you receive a bill with a **single account**, use the street number listed in the service address at the top of the bill.

IMPORTANT - Do not use the service address listed in the mailing address. This may not connect correctly in the Energy Data Portal Tool.

CUSTOMER NAME

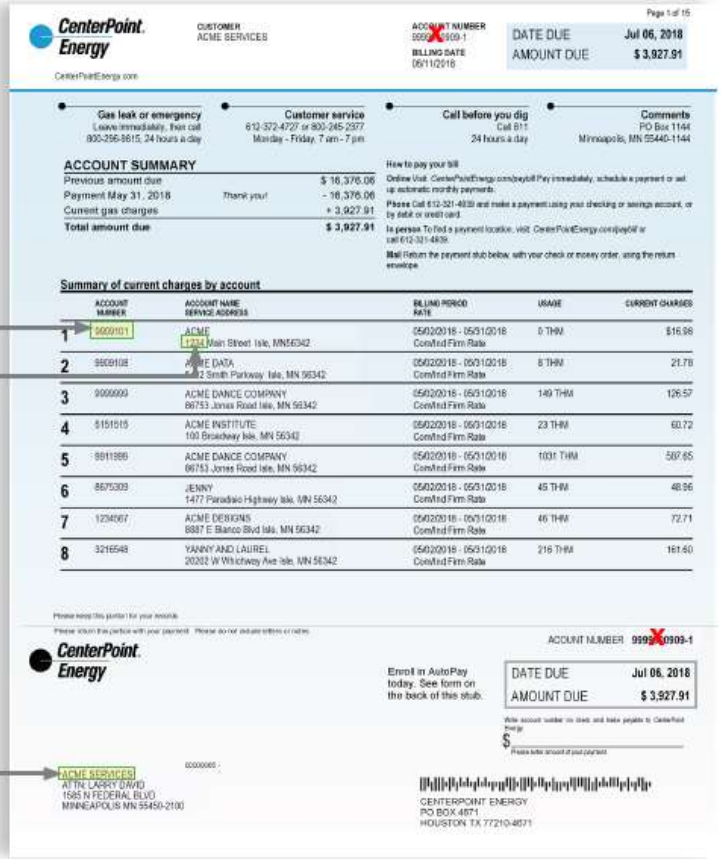
If you receive a summary bill with **multiple accounts**, use the account name listed in the mailing address on the bill.

IMPORTANT - If the customer name appears in two separate lines, use the top line only.

If you receive a bill with a **single account**, use the Customer Name listed in the mailing address.

IMPORTANT - If the customer name appears in two separate lines, use the top line only.

Multiple Accounts Summary Bill



CREATING YOUR ENERGY DATA PORTAL PROPERTY

Problem	Solution
I am getting a “consent needed” message, but no unit or suite numbers are shown in the consent needed list, so I can’t tell which account the consent is needed from.	Contact energydataportal@centerpointenergy.com for assistance in identifying the correct account.

FAQ FOR STEP 4 – SENDING YOUR ENERGY USE DATA TO ESPM

Problem	Solution
Energy Data Portal does not recognize my ENERGY STAR Portfolio Manager® property.	Check that you have shared the ENERGY STAR Portfolio Manager® property with CenterPoint Energy. See step 1.4 of user guide.
CenterPoint Energy has not accepted my PROPERTY SHARE request in ENERGY STAR Portfolio Manager®.	Unlike the contact request from Step 1.3, you do NOT need to wait for the property share request to be accepted; you can move on immediately to the next step and your share request will be accepted automatically when you establish automated benchmarking from the Energy Data Portal in Step 4.
After I click submit when sending my property's energy use data to ESPM, the screen freezes. No meters were created in ESPM, or I see that a meter was created, but no usage data was transferred.	The transfer process was interrupted and you must correct it by following these steps: 1) In ESPM, delete any meters that have been created by the Energy Data Portal. 2) In Energy Data Portal, on the property tab, toggle the "Use Existing Account" slider back to the left. 3) Restart Step 4. After clicking "submit", PLEASE BE PATIENT AS THE DATA TRANSFERS AND **DO NOT REFRESH** YOUR SCREEN,EVEN IF THE SCREEN APPEARS TO BE FROZEN. Depending on the size of your building, the transfer process make take up to 10 minutes.

DIFFERENCES BETWEEN EDP AND XCEL ENERGY'S BENCHMARKING PORTAL

- Buildings are defined by groups of service addresses, not by GIS data (lat/long not reliably available in our data)
  - Important for user to verify that all expected meters are present in the data
  - Buildings may comprise multiple service addresses, esp. mixed use buildings
  - Generally, there is a 1:1 relationship between accounts and meters

- Process is automated and can be fully completed by user - users do not need to wait for CenterPoint action at any stage (except initial *contact* request)
  - User authentication uses information on CenterPoint Energy bills to verify permissions, not manual approval from Utility
  - Users are responsible for defining their buildings based on all relevant service addresses
  - Users are responsible for initiating the transfer of data to ESPM
  - Tenant consent is available electronically within the tool

- Users do not create a gas meter in ESPM – the meter is created by the Energy Data Portal when user initiates the data transfer from EDP to ESPM

CONTACT INFORMATION AND USEFUL LINKS

User support:

energydataportal@centerpointenergy.com

Links:

Energy Data Portal: https://www.CenterPointEnergy.com/EnergyDataPortal

Energy Star Portfolio Manager: http://www.energystar.gov/portfoliomanager

ESPM Guide: https://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-quick-start-guide

Instructions for Linking Energy Star Portfolio Manager to B3 Benchmarking: https://mn.b3benchmarking.com/Components/Help/EnergyStarConnectionWizard.aspx

THANK YOU!