



ACCESSING NATURAL GAS DATA USING ENERGY DATA PORTAL

INSTRUCTIONS FOR THIRD PARTY SERVICE PROVIDERS
ASSISTING CENTERPOINT ENERGY CUSTOMERS

MATERIAL PRESENTED ON A COURTESY BASIS

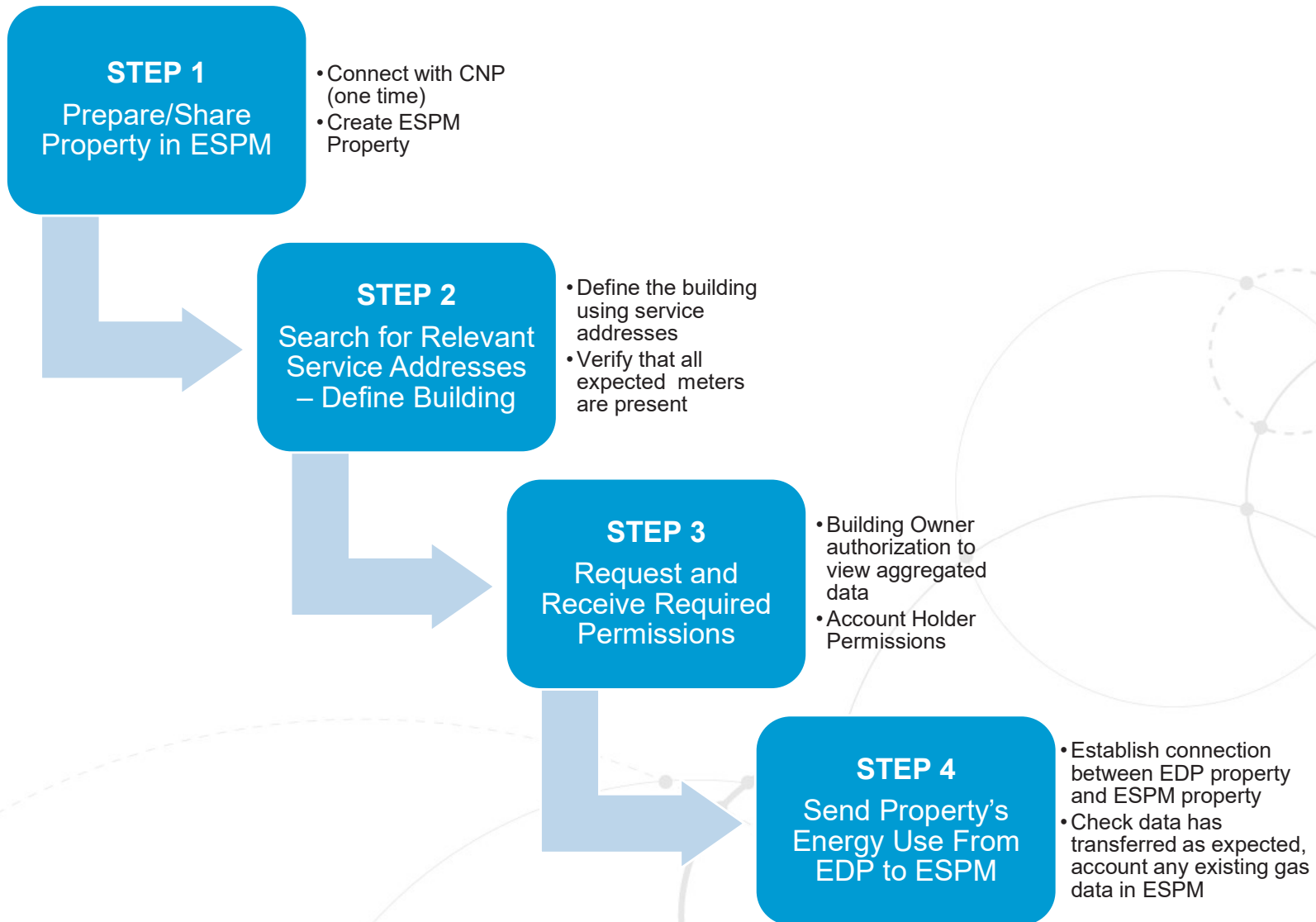


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PROCESS OVERVIEW

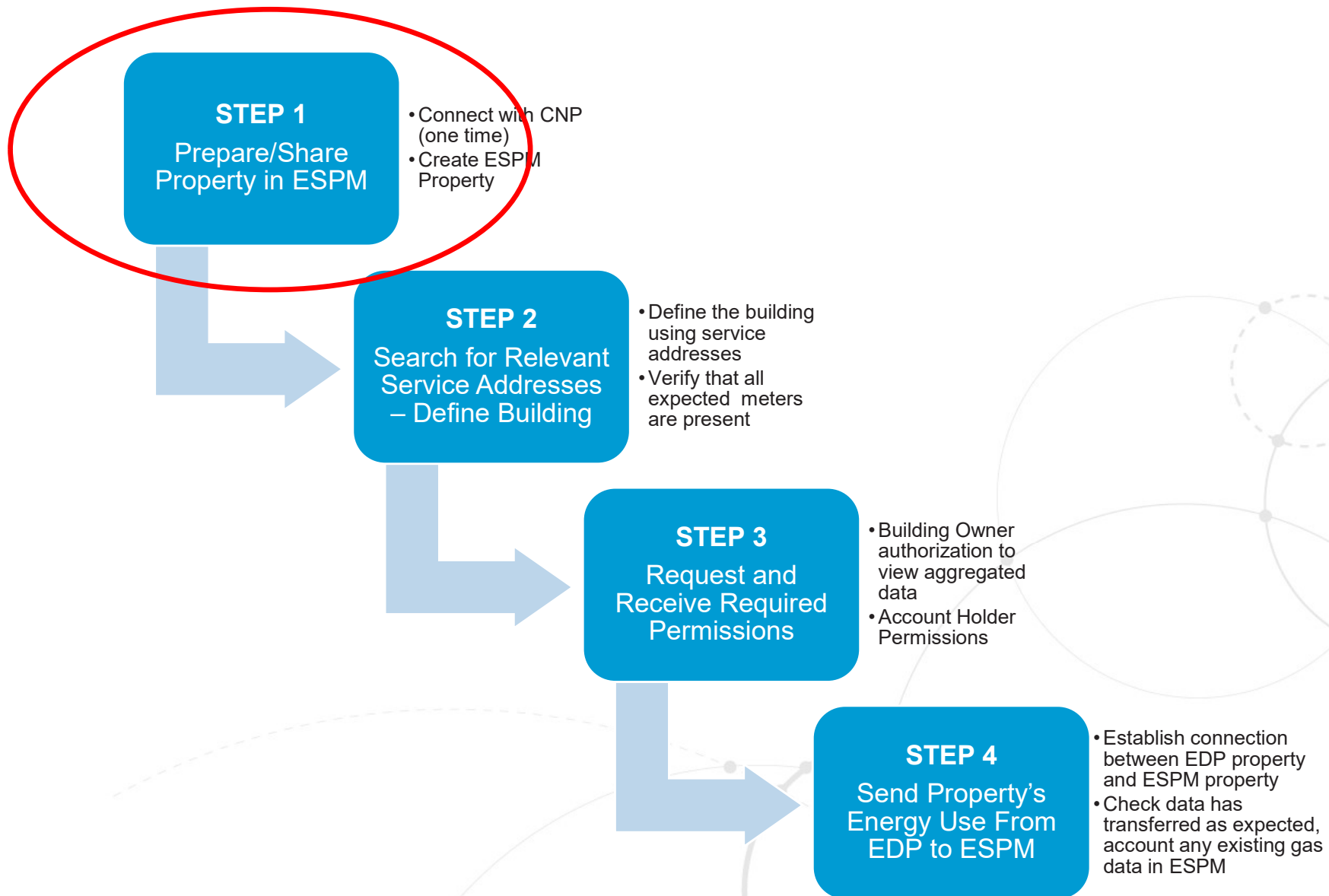


PREPARATION/ ORGANIZATION IS KEY FOR USERS (ESPECIALLY WITH MULTIPLE BUILDINGS)



- 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

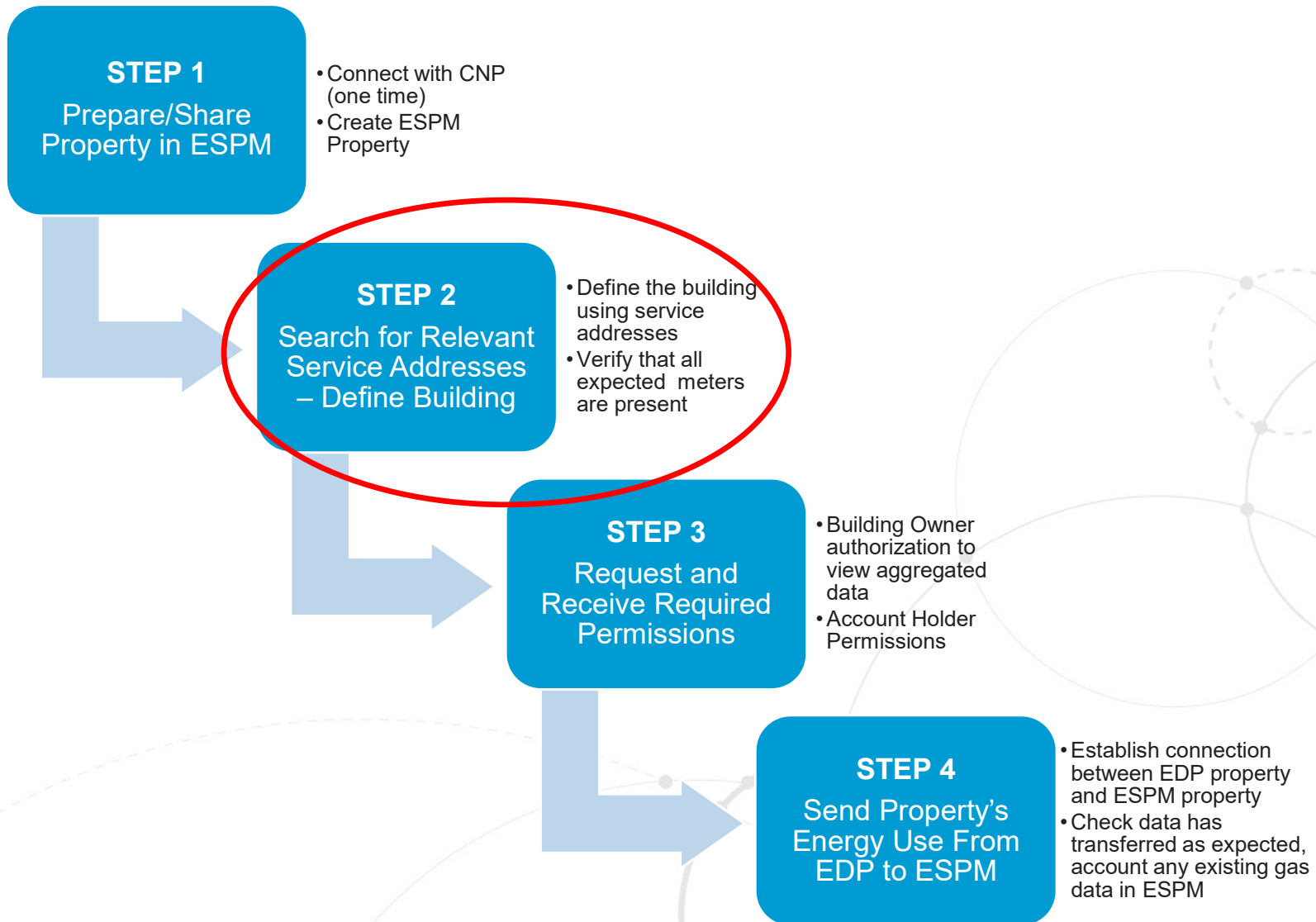
- Login or create a new account at <https://portfoliomanager.energystar.gov/pm>

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



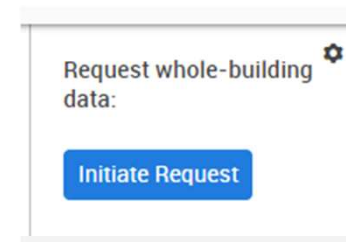
STEP 2: DEFINE BUILDING

- **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’:

A screenshot of a web form titled "Request whole-building data access:". The form has a blue header bar with the title and a close button. Below the header is a text input field labeled "Building Name". Underneath the input field is a block of instructions: "INSTRUCTIONS: Initiate access to whole building data by assigning your building name above and completing the form below. Click on each service address to add to the building definition and confirm unit/meter count. Remove a service address from the building definition by clicking on the red trash icon. View unit details by clicking on the arrow icon to right of selected service address. Limit service address options by typing in the 'Search' field. Once form is complete, click Submit button at bottom of form to complete request. Contact energydataportal@centerpointenergy.com for assistance in identifying missing meters." Below the instructions is another line of text: "CenterPoint Energy account holders: If you do not see your building's address on this list, click [here](#) to add the address using your bill(s) for this building." At the bottom of the form is a green-bordered box containing the text: "Third-party service providers: Click [here](#) to request whole-building data access for additional buildings."

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:**

Request for Whole-Building Energy Usage Data

Instructions:

Request whole-building energy use data by searching for the relevant addresses and then clicking to add each address to the building definition. You can conduct multiple searches if your building is comprised of service addresses spanning multiple street numbers or street names. Once you have created your building and confirmed the total service location (unit) count, provide additional request details in the fields below and click Submit.

Building Name

ABC Apartments

Search:

Street

345 P

Search

345 P St, Minneapolis, MN, 55401|888888005

This request is for energy usage data for a building comprising the following service address(es):

Total count of locations: 0

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.



Service addresses comprising target building:

Total count of meters: 4



345 P St, Minneapolis, MN, 55401|888888005 -
4 meter(s)



- 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**



Requestor Attestation		
First Name <input type="text"/>	Last Name <input type="text"/>	Please select from the below list to indicate your relationship to the building: <input type="radio"/> Building owner <input type="radio"/> Property manager <input checked="" type="radio"/> Third-party service provider <input type="radio"/> Other: <input type="text"/>
Employer/Organization <input type="text"/>	Title <input type="text"/>	
Address <input type="text"/>	Email <input type="text"/>	Phone <input type="text"/>
By signing below, I attest that the above information is true and accurate. <input type="text"/>		
		Date: 3/27/2020
		<input type="button" value="Next"/>

STEP 2: DEFINE BUILDING

Step 2.3 Verify that all expected meters are present

Service addresses comprising target building:

Total count of meters: 4

 345 P St, Minneapolis, MN, 55401|888888005 - 4 meter(s) 

345 P - Apt 101

345 P - Apt 102

345 P - Apt 103

345 P - Apt 104

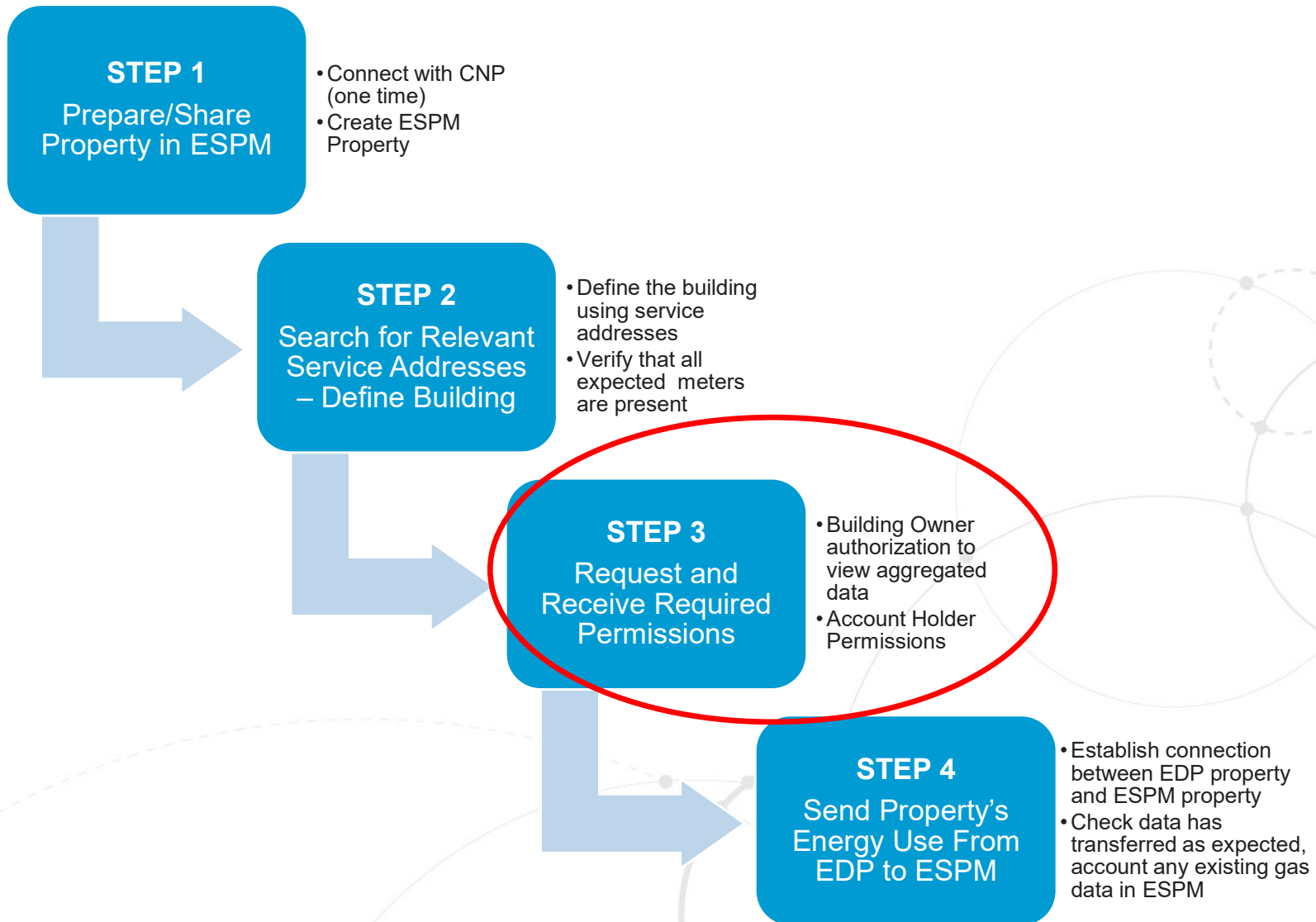
- Make sure that all expected meters (=units) are accounted for in the confirmation list

- 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 <input type="text"/>	Building Owner Email Address <input type="text"/>
Building Owner First Name <input type="text"/>	Building Owner Last Name <input type="text"/>

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)

Consent is required from the CenterPoint Energy account holders at the following service addresses

Access to whole-building usage data, in this case, requires consent from one or more account holders as per the 4/50 standard incorporated in CenterPoint Energy's approved Whole-Building Data Aggregation and Release Policies

Consent is required from the CenterPoint Energy account holder(s) at the following service address(es). Please provide contact information for that person below. If the building owner is the account holder, you will still have to request consent below (in addition to the authorization requested on the previous page).

If you do not know the appropriate contacts for the below service addresses, you can click continue and come back to it later.

Note: Unit/Suite/Appartment numbers will appear within the addresses below if they are available in our system. If unit numbers do not appear, or you do not recognize the unit numbers presented, please email us at energydataportal@centerpointenergy.com to request assistance with identifying the tenant(s) from whom consent is required. For better assistance, please include the service address(es) shown below in the body of your email.

105 Student Street EDEN PRAIRIE, MN 55344-5407

Contact Email

Contact First Name

Contact Last Name

Go Back

Continue

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 as the building owner for 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 request for access to aggregated whole-building energy use data. Please note that approving this request will not mean that the requested data will be aggregated along with all other usage data for accounts tied to the building and provided as a sum total to the City of Eden Prairie.

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 the consent form, 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

Request for Whole-Building Energy Usage Data

Instructions:
Request whole-building energy use data by searching for the relevant addresses and then clicking "add" for each address that constitutes the building. You can conduct multiple searches if your building's address spans multiple streets. Once you have created your building, click submit. On the next page, you will have a chance to confirm that the expected number of meters/units are included.

Building Name
Example Building

This request is for energy usage data for a building comprising the following service address(es):

104 Student Street, Eden Prairie, MN, 55344-5407[88880005
105 Student Street, Eden Prairie, MN, 55344-5407[88880006

Requestor Attestation

Owner Attestation

First Name	Last Name	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>
Employer/Organization	Title	Phone
<input type="text"/>	<input type="text"/>	<input type="text"/>

By signing below, I attest that the I am the owner or authorized owner representative of the building identified above, and hereby approve the release of aggregated whole-building energy usage data for this building to the Requestor.

Date: 3/27/2020

slow list to indicate building

provider

2020

re the release of aggregated whole-building

2020

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

Customer Name

Service Address

Street Number

Street Name

City

State

Zip

Signature

Signature of Customer of Record




Date Signed

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 Energy

 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 for

DETAILS

Building Name:	Example Apartment Building
Building Address:	123 Apartment Lane, St Louis Park, MN, 55416-2448 888880009, 104 Student
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,

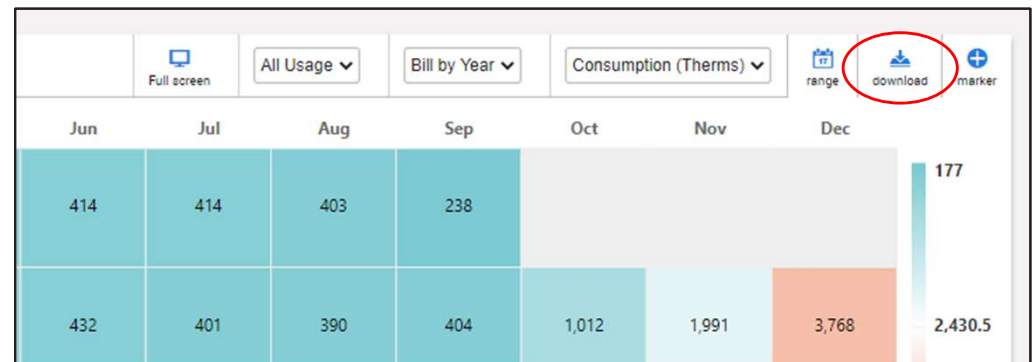
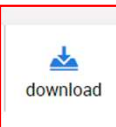
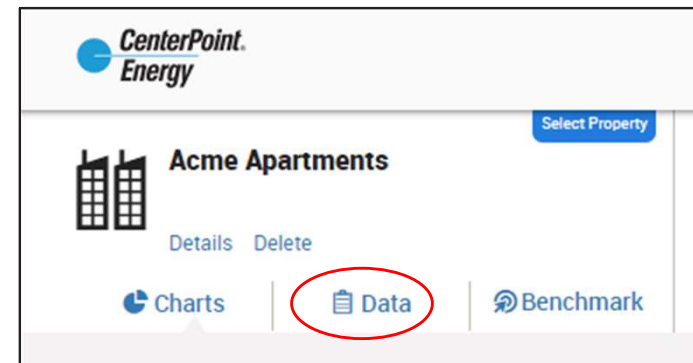
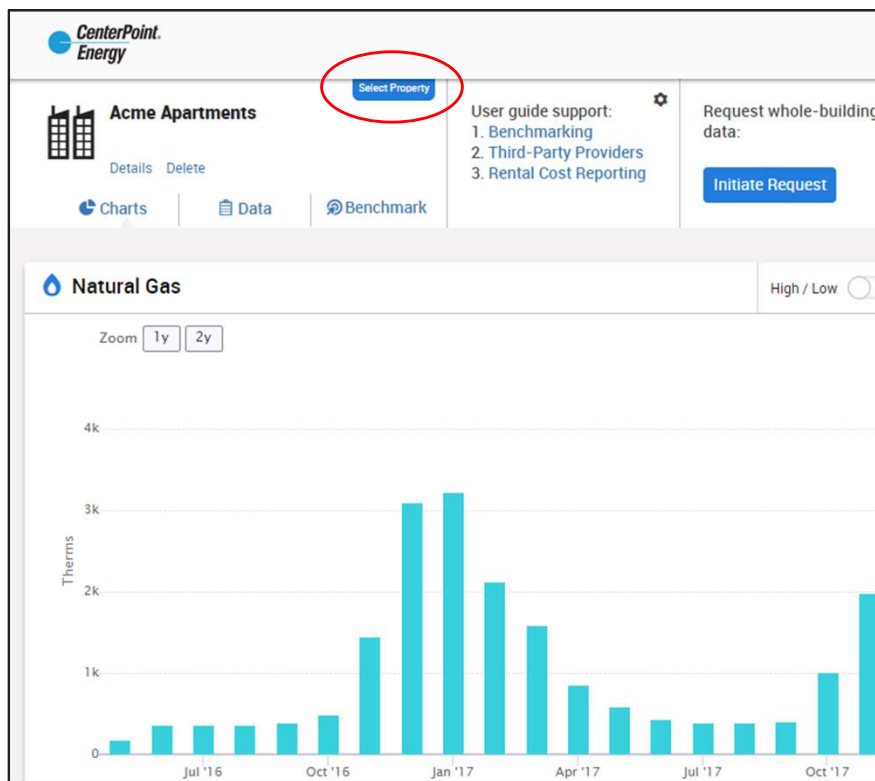
Consent has been received for the request below. Once all required consent requests have been fulfilled, you can log into the **Energy Data Portal** to view your property's energy use, and continue the benchmarking process. Note that it may take up to 20 minutes for data to be available. Please see the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

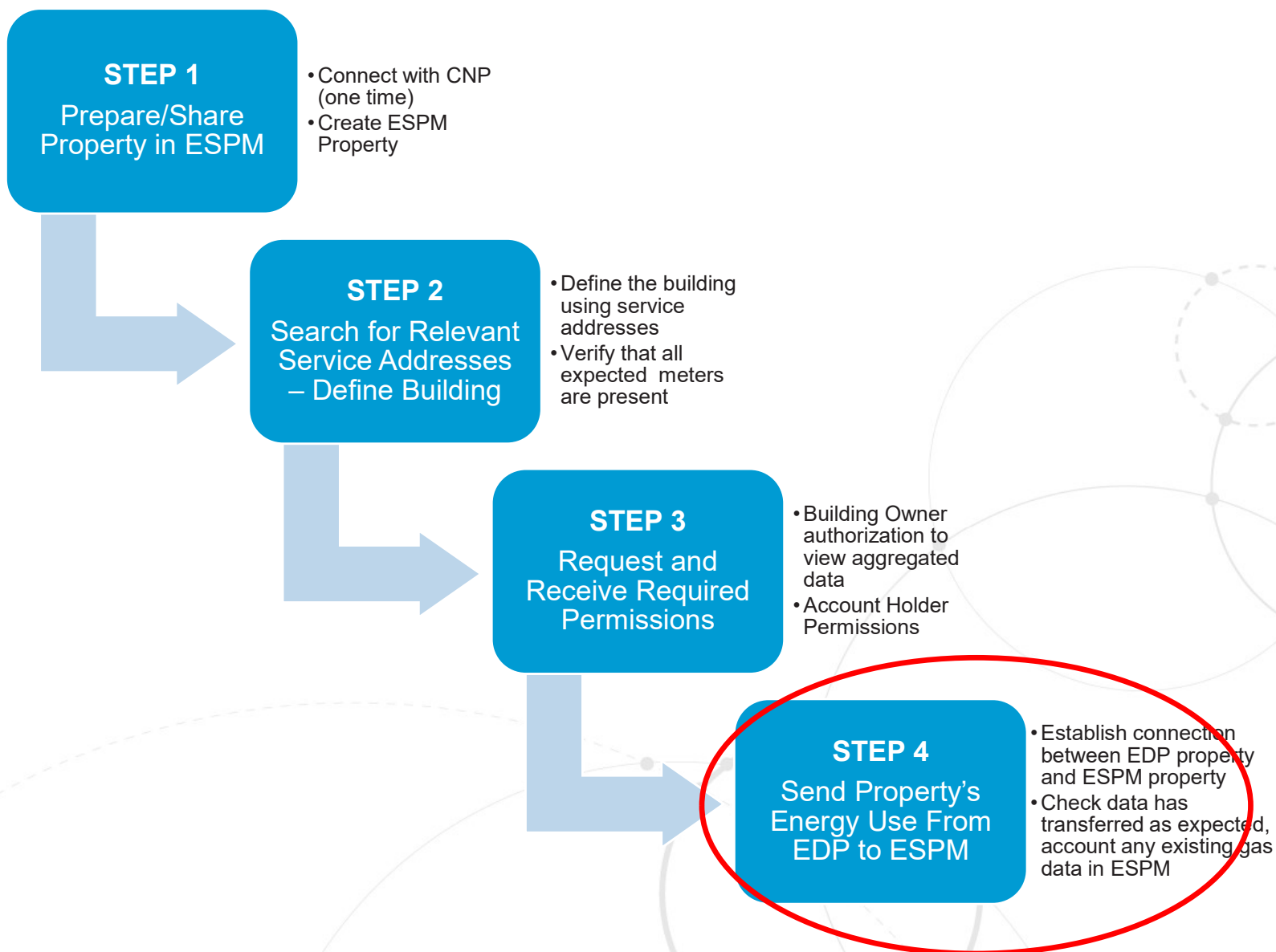
- Once all forms have been completed, you will be able to access the energy use data by logging into the [Energy Data Portal](#) and selecting your building in the “select property” list
- To download the energy use data to a .CSV file, click on the data tab, then click on download



The screenshot shows the CenterPoint Energy Energy Data Portal interface. The top navigation bar includes the CenterPoint Energy logo, a 'Select Property' button, and a 'Request whole-building data' section with an 'Initiate Request' button. Below the navigation bar, the 'Acme Apartments' property is selected, with tabs for 'Charts', 'Data', and 'Benchmark'. The 'Data' tab is active, displaying a table of energy use data. The table has columns for months (Jun, Jul, Aug, Sep, Oct, Nov, Dec) and a 'download' button (circled in red). The table shows consumption in Therms for each month, with a total of 2,430.5 Therms for the year. The 'download' button is located at the bottom right of the table.

Jun	Jul	Aug	Sep	Oct	Nov	Dec	
414	414	403	238				177
432	401	390	404	1,012	1,991	3,768	2,430.5

PROCESS OVERVIEW




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

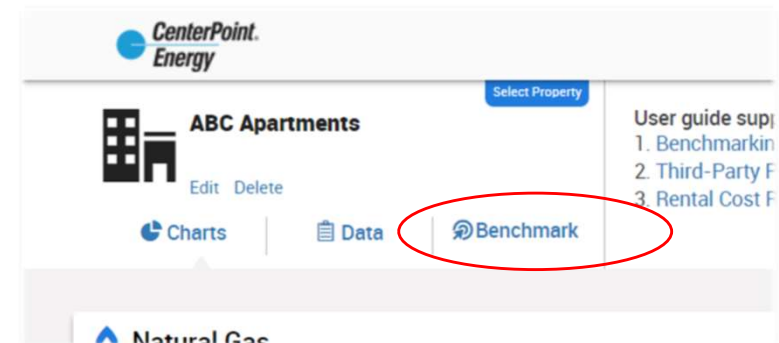


Step 4: Send Data from EDP to ESPM

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'

A screenshot of the ENERGY STAR PortfolioManager® interface. The header shows the "ENERGY STAR® PortfolioManager®" logo. Below the logo, there's a question: "Link to an existing ENERGY STAR Portfolio Manager account and building?". There are two radio button options. The first option, "Yes, I want to transfer data to an existing building in my ENERGY STAR account", is selected and circled in red. The second option is "No, I want to characterize my building and manage benchmarking here".

ENERGY STAR®
PortfolioManager®

Link to an existing ENERGY STAR Portfolio Manager account and building?

☒ Yes, I want to transfer data to an existing building in my ENERGY STAR account

☐ No, I want to characterize my building and manage benchmarking here

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

Link to an existing ENERGY STAR Portfolio Manager account and building?

☒ Yes, I want to transfer data to an existing building in my ENERGY STAR account ☐ No, I want to characterize my building and manage benchmarking here

Link this property to an existing ENERGY STAR Portfolio Manager Property to initiate automated data transfer:

- First, from your Portfolio Manager account, you must request to Connect with the CenterPoint Energy web services account **Contact**
Request Connection
- Click the button below to have your ENERGY STAR Contact connection request accepted
Check for My Contact Request
- From your ENERGY STAR Portfolio Manager account, now select to enable Sharing for the Property where you would like billing data to transfer - requires Share Properties for Exchanging Data to be completed
Initiate Sharing
- Toggle control below to enter your ENERGY STAR Property ID and initiate meter data transfer
☐ Link with Property ID

ENERGY STAR® PortfolioManager®

Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out
mbtesting923: Settings Notifications

Send a Connection Request to [CenterPoint Energy](#) to Begin Exchanging Data

[CenterPoint Energy](#) 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 [CenterPoint Energy](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use: None Provided

Agreement: ☐ I agree to my provider's ([CenterPoint Energy](#)) Terms of Use.

Send Connection Request [Cancel](#)

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[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

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.

Link to an existing ENERGY STAR Portfolio Manager account and building?

☒ Yes, I want to transfer data to an existing building in my ENERGY STAR account ☐ No, I want to characterize my building and manage benchmarking here

Link this property to an existing ENERGY STAR Portfolio Manager Property to initiate automated data transfer:

1. First, from your Portfolio Manager account, you must request to Connect with the CenterPoint Energy web services account Contact
[Request Connection](#)
2. Click the button below to have your ENERGY STAR Contact connection request accepted
[Check for My Contact Request](#)
3. From your ENERGY STAR Portfolio Manager account, now select to enable Sharing for the Property where you would like billing data to transfer - requires Share Properties for Exchanging Data to be completed
[Initiate Sharing](#)
4. Toggle control below to enter your ENERGY STAR Property ID and initiate meter data transfer
☐ Link with Property ID

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

[Check for My Contact Request](#)

3. From your ENERGY STAR Portfolio Manager account, now select to enable Sharing for the Property where you would like billing data to transfer - requires Share Properties for Exchanging Data to be completed
[Initiate Sharing](#)
4. Toggle control below to enter your ENERGY STAR Property ID and initiate meter data transfer
☐ Link with Property ID

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

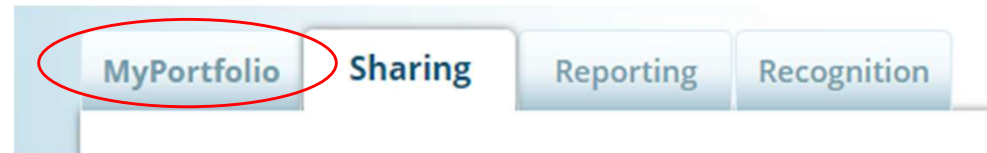
A screenshot of a web form titled "Select Properties" and "Choose Permissions". The form is divided into two main sections. The first section, "Select Properties", has a blue icon with the number 2 and a question: "Which Properties do you want to share? Note that while you can share properties that include unsupported meter types, those specific meters will not be shared." Below this is a dropdown menu currently set to "All Properties". The second section, "Choose Permissions", has a blue icon with the number 3 and a question: "If you only need to choose one permission (because you are giving 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." Below this are two main options: "Bulk Sharing (Simple Option)" which is selected with a radio button, and "Personalized Sharing ('Custom Orders')". Under "Bulk Sharing", there are four sub-options: "Exchange Data Full Access" (selected with a radio button), "Exchange Data Read Only Access", "Exchange Data Custom Access", and "Remove Access". At the bottom right of the form, there is a large blue button labeled "Authorize Exchange" and a smaller blue link labeled "Cancel". The "Authorize Exchange" button is circled in red.

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



Dashboard Search by ID or Name

Please [refresh](#) to see your current metrics.

View All Properties (6) Energy Highlights Refresh Metrics

[Add/Edit/Delete Groups](#) [Add/Edit/Delete Views](#)

Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft²)	Source EUI (kBtu/ft²)
Sample K-12 School (US)				
17710886				
Sample Library (US)				
17710884				

2. Click the button below to have your ENERGY STAR Contact connection request accepted
Check for My Contact Request
3. From your ENERGY STAR Portfolio Manager account, now select to enable Sharing for the Property where you would like billing data to transfer - requires Share Properties for Exchanging Data to be completed
Initiate Sharing
4. Toggle control below to enter your ENERGY STAR Property ID and initiate meter data transfer
☐ Link with Property ID

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.

The first screenshot shows the 'Establish Automated Benchmarking' dialog box. It has a 'Property Id' input field, a 'SUBMIT' button with a checkmark, and a 'Cancel' button. Below the input field, there are two radio buttons: 'Yes, I want to transfer data to an existing building' (selected) and 'No, I want to characterize n'.

The second screenshot shows the 'ENERGY STAR Portfolio Manager' confirmation screen. It displays the following information: 'Property Id: 17710886', 'Property Name: Sample K-12 School (US)', 'Address: 321 Education Way, Phoenix, AZ, 85005', and 'Primary Function: K-12 School'. At the bottom, it asks 'Is this your property?' with 'YES' (selected) and 'No' buttons.

The third screenshot shows the 'Please Confirm' dialog box. It contains a table of meter data and a confirmation message.

New Meter Name	Start Date	End Date	Months of data being sent
Test 923	01/01/2019	12/01/2020	24

Upon clicking 'Submit' below, records for all available historical usage data will be created and associated with this property in Portfolio Manager under the following new meter(s):

Going forward, the system will automatically create new usage records in Portfolio Manager as additional billed usage data becomes available. Please be sure to check whether this transfer may result in duplication of existing usage records. If necessary, assign an appropriate meter deactivation date to existing meters in Portfolio Manager or change meter selections in Portfolio Manager for which meters are included in the calculation of benchmarking score metrics.

At the bottom, there are 'SUBMIT' and 'CANCEL' buttons, both with checkmarks.

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

ENERGY STAR® PortfolioManager®

Welcome mbtesting923: Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out

MyPortfolio | Sharing | Reporting | Recognition

Sample K-12 School (US)
321 Education Way, Phoenix, AZ 85005 | Map It
Portfolio Manager Property ID: 17710888
Year Built: 1950
Edit

Not currently eligible for ENERGY STAR Certification

Change Metric

ENERGY STAR Score (1-100)
Current Score: 60
Baseline Score: 96

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

Meter Summary

Your utility, Salt River Project, may be able to send energy data directly to this building record, using Portfolio Manager web services. [Click here](#) for additional information and to see if this

4. Hire an organization to electronically enter your data
5. See if your utility offers this service

Export Data by Calendar Month

Meters - Used to Compute Metrics (3)
[Change Meter Selections](#)
[View as a Diagram](#)
[Add A Meter](#)

Your Property is: [Edit](#)
☒ A Single Building
☐ Part of a Building
☐ A Campus of Multiple Buildings

You Are Tracking: [Edit](#)
☒ Total energy consumption for your property
☐ Partial energy consumption for your property

Name	Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter	115513927	Electric - Grid	01/11/2020	Yes
Electric Solar Meter	115513924	Electric - Solar	12/31/2019	Yes
Test 923	115588542	Natural Gas	01/01/2021	Yes

[Download Annual Totals by Meter](#)

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.



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.	<p>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.</p> <p>Check that you are following the special instructions for account authentication – see below.</p> <p>Street Number: Make sure there is no space after the street number</p>

- 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.

CREATING YOUR ENERGY DATA PORTAL PROPERTY



Problem	Solution
<p>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.</p>	<p>Contact energydataportal@centerpointenergy.com for assistance in identifying the correct account.</p>

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 may 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/porfoliomanager>

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!