



# Energy Data Portal Benchmarking User Guide

For CenterPoint Energy Customers

## Automated Benchmarking Process Overview:

(A high-level overview of the steps in the process covered in depth in this User Guide)

<p><b>Step 1</b> <b>In ENERGY STAR Portfolio Manager® (ESPM)</b></p> <p><b>Prepare your ESPM property</b></p> <ul style="list-style-type: none"><li>• Create your ESPM property</li></ul>	<p><b>Step 2:</b> <b>In Energy Data Portal (EDP)</b></p> <p><b>Register your EDP user and link all accounts</b></p> <ul style="list-style-type: none"><li>• Register for EDP</li><li>• Add all CenterPoint accounts that YOU pay for your building</li></ul>	<p><b>Step 3:</b> <b>In EDP</b></p> <p><b>Create property</b></p> <ul style="list-style-type: none"><li>• Request whole-building data (if applicable)</li><li>• Verify that the correct number of meters are present</li><li>• If necessary, request required additional authorizations</li></ul>	<p><b>Step 4:</b> <b>In EDP</b></p> <p><b>Send Data from EDP to ESPM</b></p> <ul style="list-style-type: none"><li>• Complete Contact connection with CenterPoint Energy Web Services</li><li>• Enable property sharing for Data Exchange</li><li>• Link your EDP buildings with ESPM Building IDs</li><li>• Confirm usage data transfer</li></ul>
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## **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](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®.

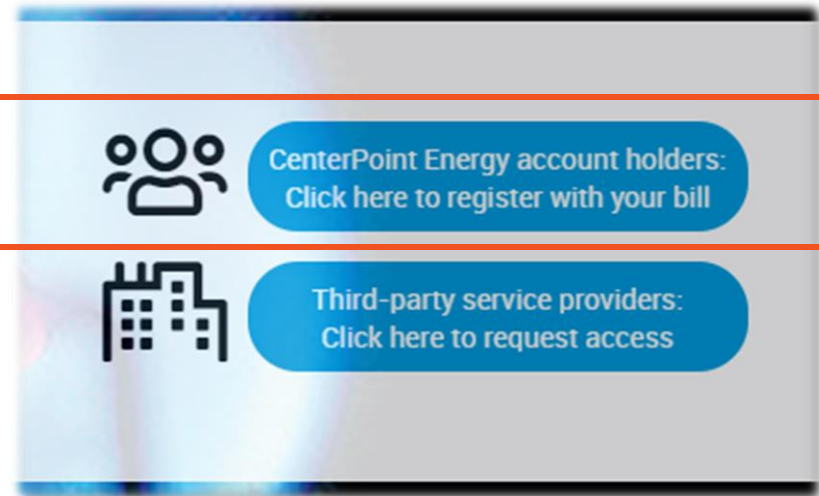
## Step 2: Register your EDP user and link all accounts

### Step 2.1 Access the EDP here:

<https://energydataportal.centerpointenergy.com/>

#### 2.1.1 Select registration link:

- Click the option to register with your CenterPoint Energy account
- Note: If you do not pay any CenterPoint Energy bills at this property, please contact us for assistance at:  
[cnpbenchmarking@icf.com](mailto:cnpbenchmarking@icf.com)



## Step 2.2 Register to use the EDP

- Use your commercial CenterPoint Energy bill and an email address to register for the EDP
- Gather the CenterPoint Energy bills that you pay for the property

*Helpful Hint* – Pick any of your commercial bills, you can add more later.

*DO NOT* use individual apartment unit or residential accounts to register; use commercial or common/house meter accounts.

*DO organize* large building portfolios by matching accounts and meters to specific properties.

- Use the following from your bill to register to use the EDP
- See the following pages for guidance and special instructions on locating required information for the registration form fields:

- **ACCOUNT NUMBER**
- **STREET NUMBER (from your Street Address)**
- **CUSTOMER NAME**

Street Number	<input type="text" value="From CenterPoint Energy Bill, see instructions above"/>
Customer Name	<input type="text" value="From CenterPoint Energy Bill, see instructions above"/>
User First Name	<input type="text" value="First Name"/>
User Last Name	<input type="text" value="Last Name"/>
Account Number	<input type="text" value="From CenterPoint Energy Bill, see instructions above"/>
Email Address	<input type="text" value="name@domain.com"/>

## Step 1

## Step 2

- Register your EDP user and link all accounts

## Step 3

## Step 4

### WHAT TYPE OF BILL DO I HAVE?

Single Account Bill → Use Next Page

Multiple Accounts Summary Bill → Use Page 8

**CenterPoint Energy**  
CUSTOMER: MO'S TAVERN DUFF  
SERVICE ADDRESS: 311 Walnut St., Minneapolis, MN 55414-1029  
ACCOUNT NUMBER: 3113113-1  
DATE DUE: Jan 07, 2019  
BILLING DATE: Dec 10, 2018  
AMOUNT DUE: \$ 8.19

**Gas leak or emergency**  
Leave immediately, then call 800-296-9815, 24 hours a day

**Customer service**  
612-321-4939 or 800-245-2377  
Monday - Friday, 7 am - 7 pm

**Call before you dig**  
Call 811  
24 hours a day

**Comments**  
PO Box 1144  
Minneapolis, MN 55440-1144

**Your usage in a glance**

**Pay your next bill without lifting a finger.** To enroll in AutoPay, just sign and date the back of your bill stub.

**ACCOUNT SUMMARY**

Previous gas amount due	\$ 17.77
Payment	No payment received. - 0.00
Balance forward	\$ 17.77
MN Interim Refund Dec 6, 2018	- 27.43
Current gas charges (Details on page 2)	+ 17.85
<b>Total amount due</b>	<b>\$ 8.19</b>

**Your account is ready to view now.** Register for free online account access. View balance, usage history, make an online payment, view recommendations for saving energy and money with My Energy Analyzer, and much more. Register at [CenterPointEnergy.com/myaccount](http://CenterPointEnergy.com/myaccount).

**How to pay your bill**

Online: Visit [CenterPointEnergy.com/paybill](http://CenterPointEnergy.com/paybill) immediately, schedule a payment or set up automatic monthly payments.

Phone: Call 612-321-4939 and make a payment using your checking or savings account, or by debit or credit card.

In person: To find a payment location, visit [CenterPointEnergy.com/paybill](http://CenterPointEnergy.com/paybill) or call 612-321-4939.

Mail: Return the payment stub below, with your check or money order, using the return envelope.

**Enroll in AutoPay today.** See form on the back of this stub.

**DATE DUE: Jan 07, 2019**  
**AMOUNT DUE: \$ 8.19**

Write account number on check and make payable to CenterPoint Energy.

00026239 01 AV 0.37 1

MO'S TAVERN  
DUFF  
104 E GOODBUDDY #100  
MINNEAPOLIS, MN 55414-1002

CENTERPOINT ENERGY  
PO BOX 4671  
HOUSTON TX 77210-4671

1600139734335 00720000053194764000000006190000000001950

**If only one account appears on each bill: SEE NEXT PAGE OF THIS DOCUMENT**

**CenterPoint Energy**  
CUSTOMER: ACME SERVICES  
ACCOUNT NUMBER: 999900099-1  
DATE DUE: Jul 06, 2018  
BILLING DATE: 06/11/2018  
AMOUNT DUE: \$ 3,927.91

**Gas leak or emergency**  
Leave immediately, then call 800-296-9815, 24 hours a day

**Customer service**  
612-372-4727 or 800-245-2377  
Monday - Friday, 7 am - 7 pm

**Call before you dig**  
Call 811  
24 hours a day

**Comments**  
PO Box 1144  
Minneapolis, MN 55440-1144

**ACCOUNT SUMMARY**

Previous amount due	\$ 16,376.06
Payment May 31, 2018	- 16,376.06
Current gas charges	+ 3,927.91
<b>Total amount due</b>	<b>\$ 3,927.91</b>

**How to pay your bill**

Online: Visit [CenterPointEnergy.com/paybill](http://CenterPointEnergy.com/paybill) immediately, schedule a payment or set up automatic monthly payments.

Phone: Call 612-321-4939 and make a payment using your checking or savings account, or by debit or credit card.

In person: To find a payment location, visit [CenterPointEnergy.com/paybill](http://CenterPointEnergy.com/paybill) or call 612-321-4939.

**Summary of current charges by account**

ACCOUNT NUMBER	ACCOUNT NAME SERVICE ADDRESS	BILLING PERIOD RATE	USAGE	CURRENT CHARGES
1 9909101	ACME 1234 Main Street, Isle, MN 56342	05/02/2018 - 05/31/2018 ConvInd Firm Rate	0 THM	\$16.98
2 9909108	ACME DATA 5432 Smith Parkway, Isle, MN 56342	05/02/2018 - 05/31/2018 ConvInd Firm Rate	8 THM	21.78
3 9999999	ACME DANCE COMPANY 86753 Jones Road Isle, MN 56342	05/02/2018 - 05/31/2018 ConvInd Firm Rate	149 THM	126.57
4 5151515	ACME INSTITUTE 100 Broadway Isle, MN 56342	05/02/2018 - 05/31/2018 ConvInd Firm Rate	23 THM	60.72
5 9911999	ACME DANCE COMPANY 86753 Jones Road Isle, MN 56342	05/02/2018 - 05/31/2018 ConvInd Firm Rate	1031 THM	587.65
6 8675309	JENNY 1477 Paradise Highway Isle, MN 56342	05/02/2018 - 05/31/2018 ConvInd Firm Rate	45 THM	48.96
7 1234567	ACME DESIGNS 8887 E Blanco Blvd Isle, MN 56342	05/02/2018 - 05/31/2018 ConvInd Firm Rate	46 THM	72.71
8 3216548	YANNY AND LAUREL 20202 W Winchway Ave Isle, MN 56342	05/02/2018 - 05/31/2018 ConvInd Firm Rate	216 THM	161.60

**If multiple account numbers appear on one bill: SEE PAGE 8 OF THIS DOCUMENT**

**Enroll in AutoPay today.** See form on the back of this stub.

**DATE DUE: Jul 06, 2018**  
**AMOUNT DUE: \$ 3,927.91**

Write account number on check and make payable to CenterPoint Energy.

00000095 -

ACME SERVICES  
ATTN: LARRY DAVID  
1585 N FEDERAL BLVD  
MINNEAPOLIS MN 55450-2100

CENTERPOINT ENERGY  
PO BOX 4671  
HOUSTON TX 77210-4671

07101868673 0072000000039073400000039279100000039279150

**If multiple account numbers appear on one bill: SEE PAGE 8 OF THIS DOCUMENT**

- Look at the first page of your bill to determine which type you have
- Then, use the Single Account Bill Guide (next page) or a Multiple Accounts Summary Bill Guide (Page 8) to find the information required to register for an EDP account

- Register your EDP user and link all accounts

## Single Account Bill

### STREET NUMBER

Use the **street number** listed in the service address at the top of the bill.

*Helpful Hint* - Do not enter the street name, only the numbers. E.g. enter only "311" if your address is 311 Walnut St.

Do not use the address listed in the mailing address (noted below with a red X). This number may cause an error in the Energy Data Portal Tool.

### CUSTOMER NAME

Use the Customer Name listed in the mailing address.

*Helpful Hint* - Use the top line **only**, if the customer name appears in two separate lines.

**CenterPoint Energy**

**CUSTOMER**  
MO'S TAVERN  
DUFF

**SERVICE ADDRESS**  
311 Walnut St, Minneapolis, MN 55414-1029

**ACCOUNT NUMBER**  
3113113-1

**DATE DUE**  
Jan 07, 2019

**BILLING DATE**  
Dec 10, 2018

**AMOUNT DUE**  
\$ 8.19

**Gas leak or emergency**  
Leave immediately, then call 800-295-9515, 24 hours a day

**Customer service**  
612-321-4939 or 800-245-2377  
Monday - Friday, 7 am - 7 pm

**Call before you dig**  
Call 811  
24 hours a day

**Comments**  
PO Box 1144  
Minneapolis, MN 55440-1144

**Your usage in a glance**

Pay your next bill without lifting a finger. To enroll in AutoPay, just sign and date the back of your bill stub and return to us with a check for your payment amount. It's that easy!

**ACCOUNT SUMMARY**

Previous gas amount due	\$ 17.77
Payment	No payment received - 0.00
Balance forward	\$ 17.77
MN Interim Refund Dec 6, 2018	- 27.43
Current gas charges (Details on page 2)	+ 17.85
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**Your account is ready to view now.** Register for free online account access. View balance, usage history, make an online payment, view recommendations for saving energy and money with My Energy Analyzer, and much more. Register at [CenterPointEnergy.com/myaccount](http://CenterPointEnergy.com/myaccount).

**How to pay your bill**

- Online**  
Visit: [CenterPointEnergy.com/paybill](http://CenterPointEnergy.com/paybill) Pay immediately, schedule a payment or set up automatic monthly payments.
- Phone**  
Call 612-321-4939 and make a payment using your checking or savings account, or by debit or credit card.
- In person**  
To find a payment location, visit: [CenterPointEnergy.com/paybill](http://CenterPointEnergy.com/paybill) or call 612-321-4939.
- Mail**  
Return the payment stub below, with your check or money order, using the return envelope.

Please keep this portion for your records.

Please return this portion with your payment. Please do not include letters or notes.

**CenterPoint Energy**

Enroll in AutoPay today. See form on the back of this stub.

**DATE DUE**  
Jan 07, 2019

**AMOUNT DUE**  
\$ 8.19

Write account number on check and make payable to CenterPoint Energy.

\$ \_\_\_\_\_

Please enter amount of your payment

00026239 01 AV 0.37 1

MO'S TAVERN  
DUFF  
104 GOODBUDDY, #100  
MINNEAPOLIS, MN 55414-1002

1600139734335 007200000531947674000000008190000000081950

### ACCOUNT NUMBER

Use the account number listed at the top of the bill for registration.

*Helpful Hint* - Only enter the numbers before the dash, not the dash or the number after it.



- Register your EDP user and link all accounts

## ACCOUNT NUMBER

Use the listed account for the service location you would like to register.

*Helpful Hint-* Do not use the account number listed at the top of the bill (noted at right with a red **X**). This number may cause an error in the Energy Data Portal Tool.

## CUSTOMER NAME

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

*Helpful Hint -* Use the top line **only**, if the customer name appears in two separate lines.

## Multiple Accounts Summary Bill

CenterPoint Energy  
CUSTOMER ACME SERVICES  
ACME SERVICES  
CenterPointEnergy.com

ACCOUNT NUMBER 9999000909-1  
BILLING DATE 06/11/2018

DATE DUE Jul 06, 2018  
AMOUNT DUE \$ 3,927.91

Page 1 of 15

Gas leak or emergency: Leave immediately, then call 800-296-9815, 24 hours a day  
Customer service: 612-372-4727 or 800-245-2377 Monday - Friday, 7 am - 7 pm  
Call before you dig: Call 811 24 hours a day  
Comments: PO Box 1144 Minneapolis, MN 55440-1144

**ACCOUNT SUMMARY**

Previous amount due		\$ 16,376.06
Payment May 31, 2018	Thank you!	- 16,376.06
Current gas charges		+ 3,927.91
<b>Total amount due</b>		<b>\$ 3,927.91</b>

**Summary of current charges by account**

ACCOUNT NUMBER	ACCOUNT NAME SERVICE ADDRESS	BILLING PERIOD	USAGE	CURRENT CHARGES
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8 3216548	YANNY AND LAUREL 20202 W Whichway Ave Isle, MN 56342	05/02/2018 - 05/31/2018 Com/Ind Firm Rate	216 THM	161.60

Please keep this portion for your records  
Please return this portion with your payment. Please do not include letters or notes.

CenterPoint Energy

Enroll in AutoPay today. See form on the back of this stub.

ACCOUNT NUMBER 9999000909-1

DATE DUE Jul 06, 2018  
AMOUNT DUE \$ 3,927.91

Write account number on check and make payable to CenterPoint Energy  
Please enter amount of your payment \$

ACME SERVICES  
ATTN: LARRY DAVID  
1111 FEDERAL BLVD  
MINNEAPOLIS, MN 55450-2100

00000095 -

0710148898673 007200800001390734000003927910000039279150

000001

## STREET NUMBER

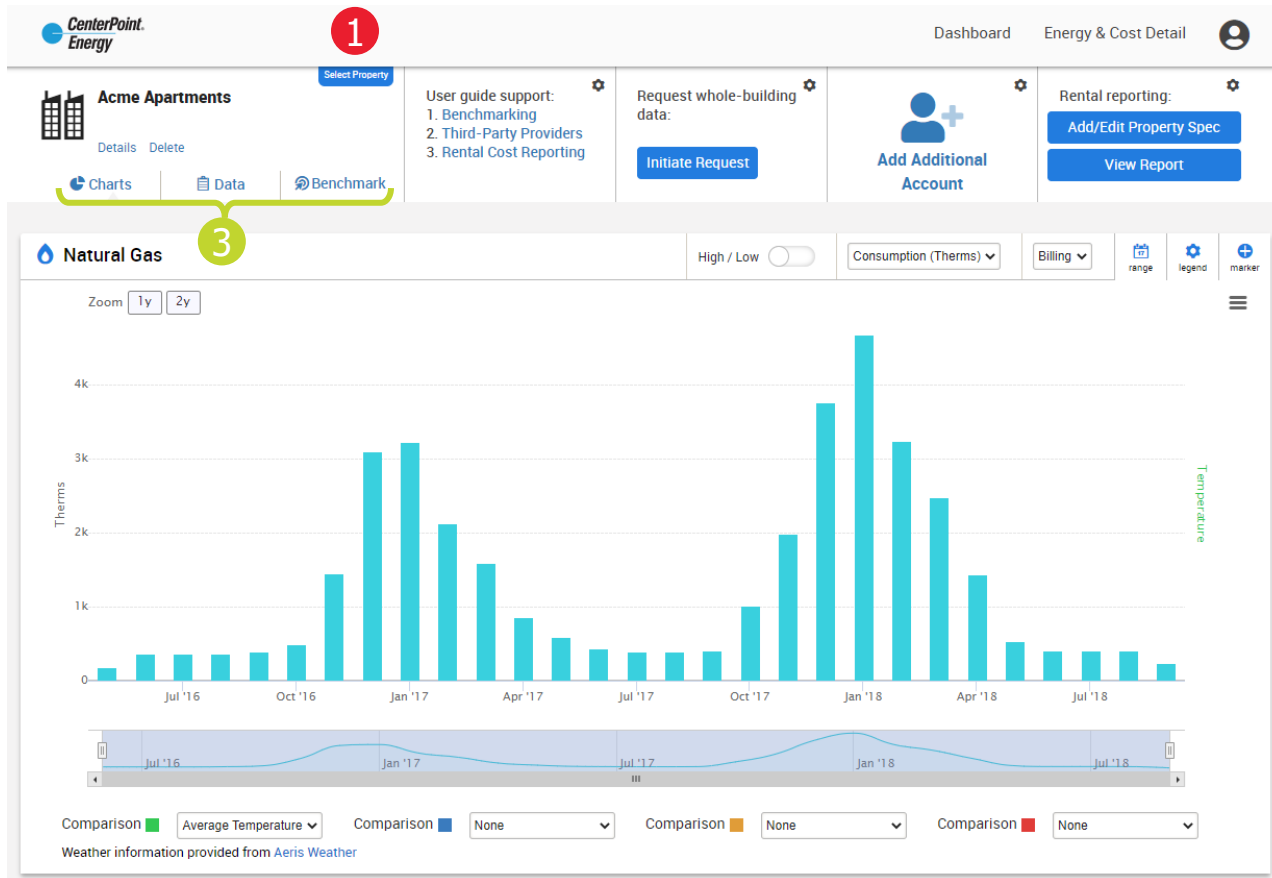
Use the street number from the service address affiliated with the account number selected from the list of accounts.

*Helpful Hint -* Do not enter the street name, only the numbers. E.g. enter only "1234" if your address is 1234 Main Street.

Do not use the street number/service address listed in the mailing address (noted at left with a red **X**). This number may cause an error in the Energy Data Portal Tool.



## Step 2.3 Get oriented to the EDP Dashboard

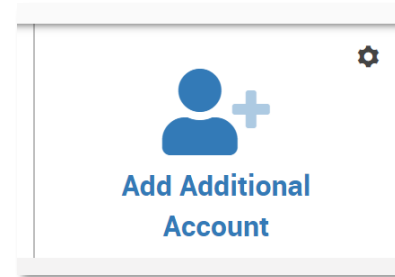


- 1 • Use 'Select Property' drop down control to select and view properties and accounts
- 2 • Use Widget panels to add accounts, request whole-building data and initiate rental cost reporting access
- 3 • Toggle between Charts (usage presentation), Data (data, download) and Benchmark (ENERGY STAR benchmarking) dashboard pages
- 4 • Use charting and data dashboard pages to visualize/explore usage and cost trends and make comparisons to weather variables and historical usage

## Step 2.4 Add additional accounts (if applicable)


- If you are the account holder for more than one natural gas commercial meter at a property (i.e., house or common meters), follow the directions to add the account information to the property for **each additional meter**. If you have tenants at your building, you do not need to add these accounts; they will be handled in the next step

- Click on "Add Additional Account" widget area:



- Enter required information as instructed

*Helpful Hint* - For apartment buildings, you only have to add *house meter/common meter accounts*, you do not have to add individual apartment unit or residential accounts; these will be handled in the next step.

*Helpful Hint* - If you do not see this "Add Account" button, click on the gear  symbol on any of the widgets to display all available options, and select the "Add Account" widget.

The system will preserve your widget setting preferences for future login sessions.

See [USER GUIDE](#) for a visual guide of where to find this information on your bill.

**Name on Account:**

**Street Address #**

**Account Number:**

**Linked Accounts:** [Add Account](#)

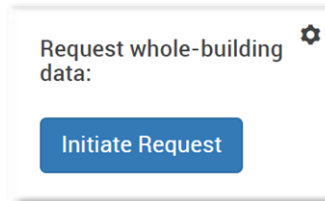
## Step 3: Create your Energy Data Portal Property

### Step 3.1 Create your EDP Property



*Helpful Hint* - Whole-building data will transfer aggregated energy use data for **all meters** at the selected service address(es) – including any tenant meters.

#### Option 1 - SIMPLIFIED WHOLE - BUILDING BENCHMARKING (RECOMMENDED)

- Click on the “Initiate Request” button from the “Request whole-building data” widget
- Complete the whole-building data access form:
  - Assign a name in the “Building Name” field
  - Click each relevant service address that comprises the building, from the “My Service Addresses” list and confirm unit count details.
  - Use the “Add Other Locations” tab to search for and select service addresses where you do not have an authenticated account.



*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

## Option 1 - (CONTINUED)

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

- Confirm the expected number of meters at the property

*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

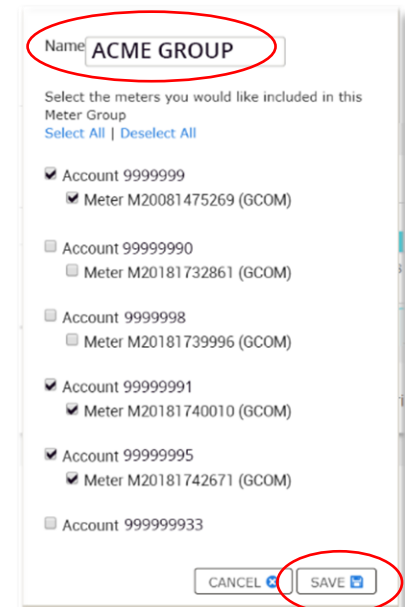
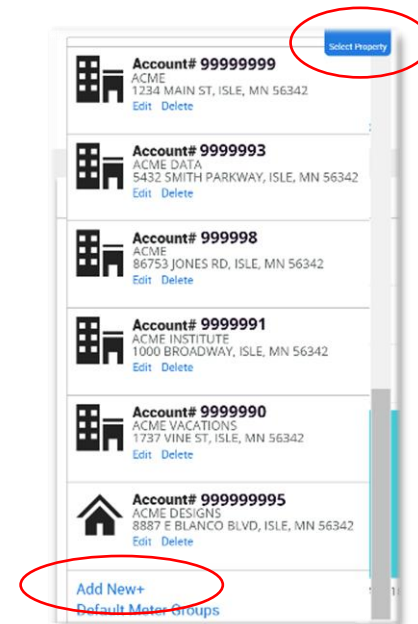
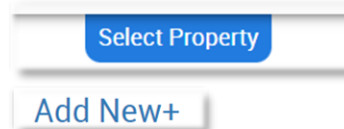
## Option 2 - DETAILED METER LEVEL DATA

Choose this option only if you wish to have detailed energy use for each of your building's meters, rather than aggregated totals for your building. This option should only be used if you pay all of the CenterPoint Energy Bill(s) for your building, and want to track energy use data individually for each meter

This option can require more on-going maintenance. This option can also be used to create customized grouping of accounts, such as a grouping of all accounts at a campus of buildings, or a grouping of all accounts to track total energy use

### • Create New Meter Group

- Determine which accounts are relevant to your building or customized grouping of accounts, and note each account number/meter number
- Click on "Select Property"
- Click on "Add New+"
- Enter a name for the building or grouping of accounts
- Select applicable accounts
- Click "Save" at the bottom of the account listings to create the new meter group and return to dashboard access displaying multiple accounts and associated meters together



## Step 3.2 (If applicable) Request further authorizations

- You will see the below message if further authorization is required. Follow the instructions on the screen to make applicable requests. **If you do not see this message, skip to Step 4**

**Natural Gas**

Energy Use Data cannot be displayed until further authorizations have been provided.

**CenterPoint Energy Customers:** If you are the customer of record for one or more account(s) at the building, first check that you have added each of your CenterPoint accounts to your profile. [Click here to Add Accounts](#) to your profile.

**Third Party Service Providers and Building Owners/Managers with Tenants:** If you are NOT the customer of record for any accounts at the building, (e.g. your tenants or your clients pay CenterPoint Energy bills), click "Request Consent" below to view a list of remaining accounts requiring further authorization. You will need to request consent from the current account holder(s) of each account listed. [Click here to Request Consent](#).

Once all required authorizations have been provided, it may take up to 30 minutes for data to be released.

The constraints described below are referred to as the Aggregation Threshold Policy or the "4/50 Rule"  
Evaluated for each calendar month's usage

- CenterPoint Energy is bound by regulatory policy to require additional authorizations prior to disclosure if either:
  - 1) There are fewer than four customer/tenant accounts at the building service location, OR
  - 2) More than 50% of the service location usage is attributable to any one non-authenticated account

## Step 3.3 (If applicable) Request additional account holder consent to aggregate whole-building energy use data

- When required, consent is needed from current account holders (i.e., renters or tenants) at the service location
- Complete and send requests to all account holders required to provide access to aggregated whole building data

The image shows a web form for requesting consent to aggregate whole-building energy use data. The form is titled "Consent is required from the CenterPoint Energy account holders at the following service addresses". It includes a note about unit numbers and a link to request assistance. Below the note, there is a table of service addresses with "Request Consent" buttons. The form also includes fields for Tenant Email, Tenant First Name, Organization/Trade Name, Title, First Name, Physical and Mailing Address, Phone, and Email. At the bottom, there is a "Send Request" button and a "Close" button.

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

Note: Unit/Suite/Apartment 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](mailto: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.

**IMPORTANT:** This consent process is required only if you are not the account holder for these services address (e.g., you are a third party service provider, or you are the building owner/property manager but have a tenant in the building that pays their own CenterPoint Energy bill). If you do not have tenants and/or are the account holder for any of the listed service addresses, you can authenticate additional accounts [HERE](#) using information from your CenterPoint Energy bill for that address.

123 APARTMENT LN APT 101 MINNEAPOLIS, MN 55416	<a href="#">Request Consent</a>
123 APARTMENT LN APT 102 MINNEAPOLIS, MN 55416	<a href="#">Request Consent</a>

[Close](#)

Tenant Email

Tenant First Name

Please provide your information:

Organization/Trade Name

Title

First Name

Mark

Physical and Mailing Address

Phone

Email

If you do not want to use the automated electronic authorization process, please click [here](#) to access and print or download the form for offline processing.

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

[Send Request](#) [Close](#)




## Step 3.4 (If applicable) Account holders receive Consent Request email

- Identified account holder contacts will receive a Consent Request email, with copies sent to the Requestor and the EDP Team, including a link for contacts to complete the online authorization process

**Subject:** Request: Customer Consent to Release Energy Use Data - CenterPoint Energy

**Energy Data Portal  
Consent Request**



[br]

Building: [BuildingName]

Hello, [TenantName]

You are receiving this email because the individual below identified you to be the appropriate contact associated with a CenterPoint Energy natural gas account in the building they own or manage. The requester is seeking to gain access to aggregated whole-building energy use data. Details of this request are provided below. Please note that approving this request will not mean that the requester gets access to your individual account data and energy usage information; only that your energy usage data will be aggregated along with all other usage data for accounts tied to the building and provided as a sum total to the requester.

**INSTRUCTIONS:**

- Find a copy of your CenterPoint Energy Bill
- REVIEW SPECIAL INSTRUCTIONS BELOW BEFORE FILLING OUT THE FORM
- Click on the link below to open the consent form
- Enter the requested information using information from your bill
- You will receive an email confirmation when you have successfully filled out the form

Again, please have a copy of your CenterPoint Energy bill in front of you, as the form will ask for information from your bill.

**Special Instructions when Filling out Consent Form**

Customer Account Number: DO NOT enter the dash or number after the dash (Example: Enter 123456 for Account Number 123456-7)

1

*Helpful Hint* - EDP generated emails can be flagged as Spam, the data requestor should follow-up with the account holder contact to ensure the Consent Request was received.

## Step 3.5 (If applicable) Account holders provide consent to release aggregated whole-building data in EDP

- Additional account holders, such as renters, complete the following form to provide their consent to release aggregated whole-building data to requestors

**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	<input type="text"/>
Customer Name	<input type="text"/>
Service Address	
Street Number	<input type="text"/>
Street Name	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Signature	
Signature of Customer of Record	<input type="text"/>
Date Signed	<input type="text"/>

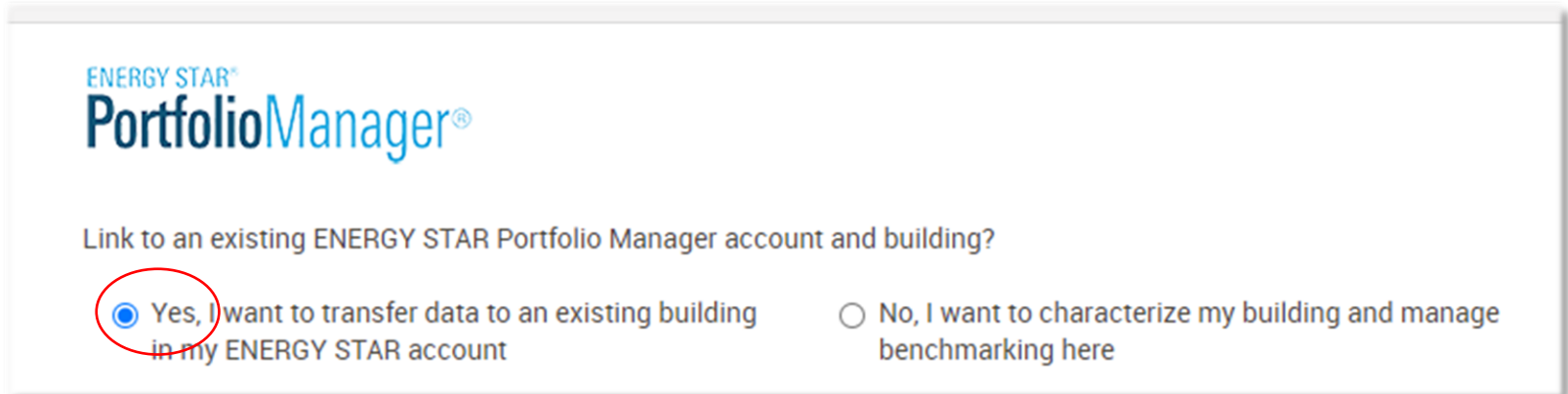
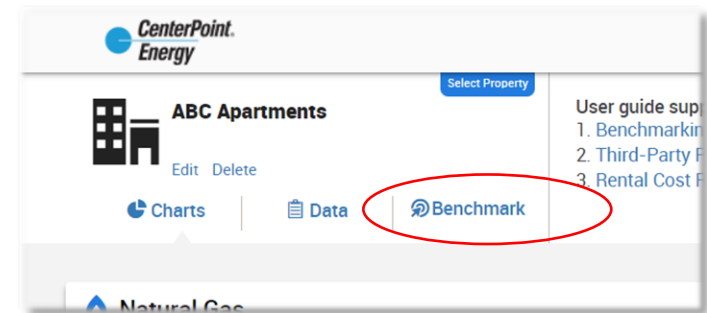
*Helpful Hint* - If you have any questions related to the account holder authorization request process, please contact the EDP support group at [cnpbenchmarking@icf.com](mailto:cnpbenchmarking@icf.com)

## 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 Portfolio Manager account linking screen. The header shows the 'ENERGY STAR PortfolioManager' logo. Below the logo, the text reads 'Link to an existing ENERGY STAR Portfolio Manager account and building?'. There are two radio button options: 'Yes, I want to transfer data to an existing building in my ENERGY STAR account' (which is circled in red) and 'No, I want to characterize my building and manage benchmarking here'.

## 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:

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

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](#)

- 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

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](#)

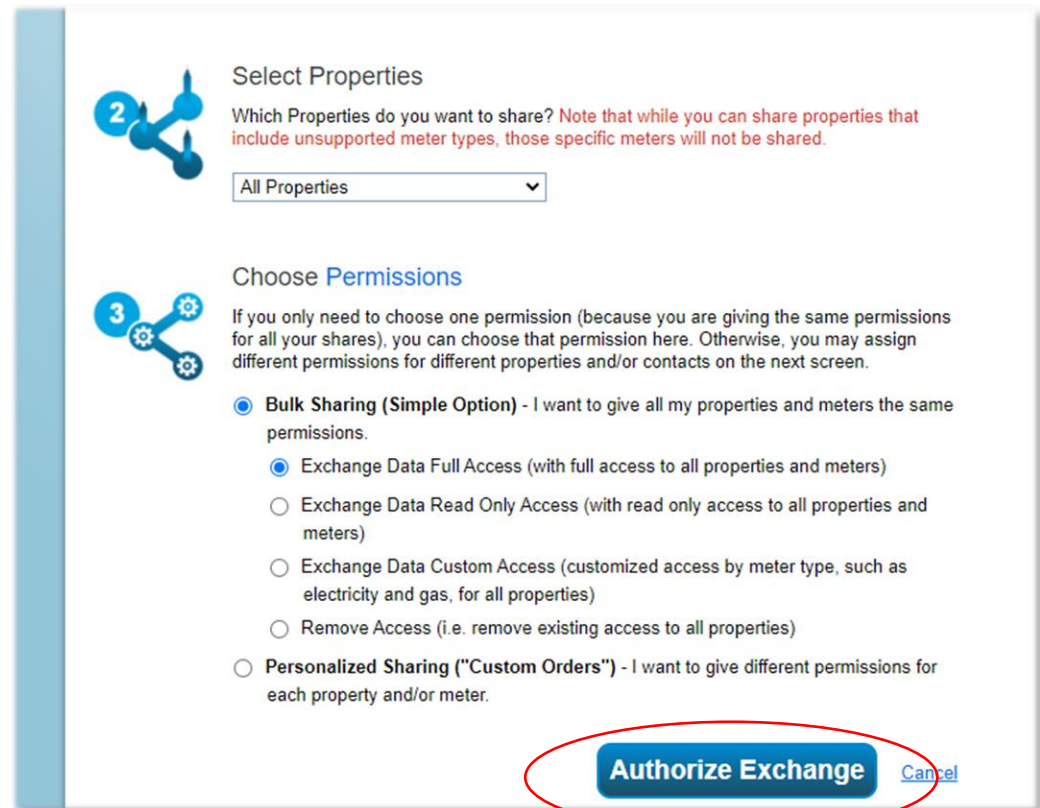
- Complete form to select 'One Property' or 'All Properties' to share with CenterPoint Energy

## 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



The screenshot shows a two-step process for setting ESPM access permissions. Step 2, 'Select Properties', includes a dropdown menu currently set to 'All Properties'. Step 3, 'Choose Permissions', presents two main options: 'Bulk Sharing (Simple Option)' and 'Personalized Sharing ("Custom Orders")'. Under 'Bulk Sharing', there are four radio button options: 'Exchange Data Full Access' (selected), 'Exchange Data Read Only Access', 'Exchange Data Custom Access', and 'Remove Access'. The 'Personalized Sharing' option is also available. At the bottom right, the 'Authorize Exchange' button is highlighted with a red oval, and a 'Cancel' link is visible next to it.

**2** Select Properties

Which Properties do you want to share? *Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.*

All Properties

**3** Choose Permissions

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.

☒ **Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.

- ☒ Exchange Data Full Access (with full access to all properties and meters)
- ☐ Exchange Data Read Only Access (with read only access to all properties and meters)
- ☐ Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)
- ☐ Remove Access (i.e. remove existing access to all properties)

☐ **Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

**Authorize Exchange** [Cancel](#)

- Send Data from EDP to ESPM

## 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

MyPortfolio Sharing Reporting Recognition

Dashboard

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)
<a href="#">Sample K-12 School (US)</a> 17710886				
<a href="#">Sample Library (US)</a> 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 1

Step 2

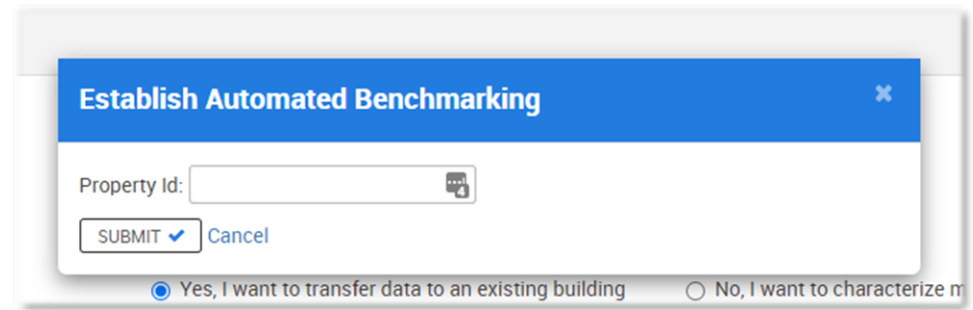
Step 3

Step 4:

- Send Data from EDP to ESPM

- 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

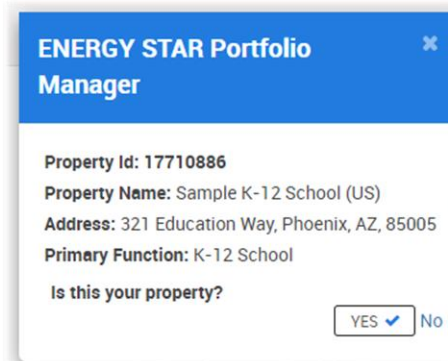
Congratulations! You have now established ongoing automated data transfer to ESPM to facilitate your building benchmarking.



**Establish Automated Benchmarking**

Property Id:

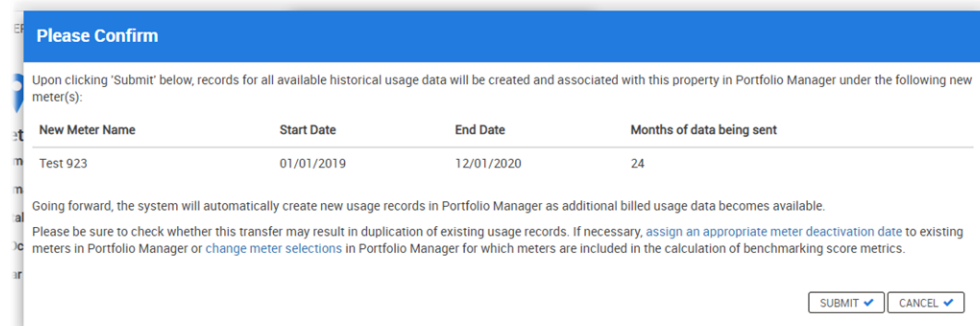
☒ Yes, I want to transfer data to an existing building ☐ No, I want to characterize m



**ENERGY STAR Portfolio Manager**

Property Id: 17710886  
Property Name: Sample K-12 School (US)  
Address: 321 Education Way, Phoenix, AZ, 85005  
Primary Function: K-12 School

Is this your property?



**Please Confirm**

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):

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

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.

- Send Data from EDP to ESPM

## 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

The screenshot shows the ENERGY STAR Portfolio Manager interface for a property named 'Sample K-12 School (US)'. The 'Energy' tab is selected and circled in red. Below the tabs, the 'Meters' table is displayed, showing three meters. The 'Test 923' meter, which is a Natural Gas meter, is circled in red.

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

*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.

# FREQUENTLY ASKED QUESTIONS

**Problem:** I am trying to add an account but the Energy Data Portal keeps giving me an error message (e.g. “account number, street number or customer name does not match our records”).

**Solution:**

- Check that you are using the correct information on your bills – see Pages 6-8 of user guide for a visual guide for where to find the correct information.
- Check that you are following the special instructions for account authentication – see Step 2.2 on Page 5 of this User Guide.
- Street Number: Make sure there is no space after the street number.

**Problem:** I do not see my building’s service address in the list.

**Solution:** You must first add all of your CenterPoint Energy accounts associated with the building – see Step 2.4 on Page 10 of this User Guide.

**Problem:** I am getting a “consent needed” message after I request whole building data, but I do not have any tenants in my building.

**Solution:**

- There is an additional account at the building that must be added to the Energy Data Portal before proceeding.
- Check that all accounts associated with the building have been added – see Step 2.4 on Page 10 of this User Guide. After adding the additional account, you may have to wait for up to 20 minutes before the data will display.

**Problem:** I am getting a “consent needed” message for my building. I have tenants, but no unit or suite numbers are shown in the consent needed list, so I can’t tell which unit the consent is needed from.

**Solution:** Contact [energydataportal@centerpointenergy.com](mailto:energydataportal@centerpointenergy.com) for assistance in identifying the correct unit.

# FREQUENTLY ASKED QUESTIONS (CONTINUED)

**Problem:** I have a mixed use property. My tenant pays their own CenterPoint bill, and are designated as a separate service address – how do I ensure that their energy use data is included in my aggregated data?

**Solution:** Contact [energydataportal@centerpointenergy.com](mailto:energydataportal@centerpointenergy.com) for assistance in adding your tenant's additional service address.

**Problem:** Energy Data Portal does not recognize my ENERGY STAR Portfolio Manager® property.

**Solution:** Check that you have shared the ENERGY STAR Portfolio Manager® property with CenterPoint Energy. See Step 4.3 on Page 20 of this User Guide.

**Problem:** CenterPoint Energy has not accepted my PROPERTY SHARE request in ENERGY STAR Portfolio Manager®.

**Solution:** 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.

**Problem:** 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.

**Solution:** 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.

# CONTACT INFORMATION AND USEFUL LINKS

## User Support:

Email: [cnpbenchmarking@icf.com](mailto:cnpbenchmarking@icf.com)

Phone: 507-315-1195 (8AM – 5PM CST)

## Energy Data Portal:

<https://www.CenterPointEnergy.com/EnergyDataPortal>

**THANK YOU!**