National Grid Benchmarking Portal

User's Guide to Uploading Aggregate Usage Data

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

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

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

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



Table of Contents

Connecting and Sharing with National Grid	2
Resharing EPM Property Share (Returning Customers)	7
Registering on the National Grid Site	8
NY Metro and Long Island Customer Process	8
MA and UNY Customers	9
National Grid Benchmarking Portal Online Form	11
National Grid Web Submission Messages	15
Additional Historical Usage Data Upload Option	18
Frequently Asked Questions	21
Appendix (Creating an ENERGY STAR [®] Portfolio Manager Account)	24

EPA ENERGY STAR Portfolio Manager (EPM) Site

Step 1:

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

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

How to connect your EPA's Portfolio Manager account to National Grid and share Property with NGrid

A. Connect with National Grid.

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

VlyPor	rtfolio	Sharing Reporting	Recognition	
Mv	Con	itacts		Search for new contact
and yc accour	ou can s nts and	hare your properties & reports with an sending a connection request.	ny of your connected of	contacts. You can "connect" to other Portfolio Manager users by searching for their
and yo accour	ou can s nts and Sha	hare your properties & reports with an sending a connection request. are Edit Delete Add Contact A Name	Add Organization + Organ	In add anyone as a contact, regardless of whether they have a Portfolio Manager account contacts. You can "connect" to other Portfolio Manager users by searching for their
All	ou can s nts and Sha	hare your properties & reports with an sending a connection request. The Edit Delete Add Contact A Name NG Test Property Management Co Commercial Real Estate	Add Organization	In add anyone as a contact, regardless of whether they have a Portfolio Manager account contacts. You can "connect" to other Portfolio Manager users by searching for their

2

- 2. If National Grid is connected, go to Step B on page 4. If not:
 - Click Add Contact.
 - To search for National Grid, enter "National Grid Web Services" In name field.
 - Click Search.
 - From the list, locate "National Grid Web Services."
 - Click Connect.

Search Results

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

Name:	National Grid Web Services	Bench Marking Web Services with National Grid	- 1 of 1
Organization:			
Jsername:			
Email Address:			
	Search		
Тір			

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



3

B. Share the Property

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

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



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

Share Properties for Exchanging Data

	Choose Permissions	Set Up Connections	Check Existing Permissions	View Results/ Confirmation	
Sometimes it's provider.	really important to be able to share your prop	erty with someone else. Use this op	otion to set up automatic ex	change of data with your utility o	r servic
¢	Select Web Services Provider of Which web services provider (account) do to exchange data? You can share multiple Select web services provider from my cont National Grid Web Services (National Grid Web Services)	(Account) you want to share these properties properties at once with a single pro acts book:	with in order vider.	"regular sharing," when you "bulk Web Service Provider, you can on . This is because the bulk share de ements/settings of the provider.	share" Ily pick epends
	Select Properties Which Properties do you want to share? Ninclude unsupported meter types, those sp Multiple Properties	ote that while you can share proper ecific meters will not be shared. elect Properties <u>Selected Properties</u>	ies that		
3.0	Choose Permissions If you only need to choose one permission want to give the same permissions for all y here. Otherwise, you may assign different p contacts on the next screen.	(because you are doing a single sh our shares), you can choose that p permissions for different properties :	are or you ermission and/or		
	 I want to set permission levels in bulk f Exchange Data Full Access (with f Exchange Data Read Only Access meters) Exchange Data Custom Access (o electricity and gas, for all properties) 	or all selected properties and meter full access to all properties and met a (with read only access to all prope ustomized access by meter type, so as) Edit	s. ers) rties and uch as		
	 Remove Access (i.e. remove exist I want to provide different levels of acc meter within a property. 	ing access to all properties) ess for each property or to each ind	ividual		

- 4. Go to "Select Properties," and use the drop-down menu to indicate whether you wish to share one property, multiple properties, or all properties with National Grid.
 - If you need National Grid data for just one property, select "One Property" from the drop-down list. You will then be presented with a second drop-down list from which you can select the property to share.
 - If you need National Grid data for more than one property, choose "Multiple Properties" from the dropdown list. From there, click the button that says, "Select Properties," and a new window will pop up with a prompt. Check the boxes next to the property names you wish to share, click "Apply Selection," and you will be taken back to the "Share Properties for Exchanging Data" page. Make sure that the correct number of "Selected Properties" is showing.
- 5. Go to "Choose Permissions" and select the first option, "I want to set permission levels in bulk for all selected properties and meters."
 - From the list of options that appears, select "Exchange Data Custom Access." This launches a new window, where you can set the Access Permissions that will apply to all properties that you are sharing with National Grid.

Select the permission level below that you would like to grant					fo	or each category.
Item	None	Exchange Data Read Only	Exchang Full Acc	je Data ess		About Pe Select perm Select perm "Explanate Data Full Access"
Property Information	0	0	۲	•		Only or Full Information in order to provide aggregate
All Meter Information						Property energy usage data.
Energy Meters						Summary, Details, and Design tabs and all metrics for this property
Electric - Grid	۲	0	0			through the Reporting tab, even if you choose None for some of the
Natural Gas	۲	0	0			If you want someone to add &
Fuel Oil (No. 2)	۲	0	0			delete meters, you need to choose "Full Access" for Property Information
 Water Meters 						All Meter You <u>do not</u> need to share
Additional Options:						• None- the Met access to specific energy meters with National Grid,
ltem				Yes	No	can't se meters only share access on the
* Share Forward Allow give them any permis right to share with mo	to share sions tha re peopl	e this property with ot at he/she has, includi e.	thers and ng the	۲	0	Read Only – provides access to view meter entries, but not make any edits Apply Selection Cancel

Uploading whole building aggregate data to EPA Portfolio Manager Visit the National Grid site at ngrid.com/epm

Select Custom Access Permissions for

5

Make the following selections:

- o Property Information: select "Exchange Data Full Access."
- o Meter Information:

③For each meter displayed, choose "None" – even if existing National Grid meters are listed.

- You do not need to share access to specific energy meters with National Grid. After you have successfully shared your property, National Grid will create one or more new "virtual" meters, into which your aggregate energy consumption data will be uploaded.
- If you do select "Read Only" or "Full Access" at the meter level, this will be ignored by National Grid, and may even be rejected, since meter-level shared access is not needed by National Grid's system. As long as you have provided "Full" access at the property level, then this will be sufficient.
- ✓ Water Meters: select "None."
- ✓ Goals, Improvements, & Checklists: select "None."
- ✓ Recognition: select "None."
- Share Forward: select "Yes."
 - Click "Apply Selection," which will return you to the "Share Properties for Exchanging Data" page.
- 6. From the "Share Properties for Exchanging Data" page, review your selections and then click "Authorize Exchange."
- 7. If there are any issues with your sharing request (e.g., you attempted to share a property for which you do not have the necessary access rights), Portfolio Manager will alert you and prompt you to make corrections. Otherwise, you will see a confirmation page that says, "Bulk Share Properties for Exchanging Data: Results." You will also see confirmation of the outgoing shares in the "Sharing Notifications" box on the "Sharing" tab of your Portfolio Manager account.

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

Bulk Share Properties for Exchanging Data: Results

	Choose Permission	s Set Up Connections	Check Existing Permissions	View Results/ Confirmation	
🗸 Co	ongratulations! You have successfully	shared/edited access to your prop	erty(ies).]
А	total of 3 share requests were sent.				
lf y	you shared properties, you will receive a dits have been made, no acceptance is re	notification when your contact has acc quired.	cepted the share. If you edited acc	ess to current permissions, the	
				Clos	

Resharing EPM Property Share (Returning Customers)

- 1. If you have received the most recent years' data upload from National Grid, you should not unshare your property or meter(s) with National Grid. Leave these shares in place and the next data upload should be pushed through automatically.
- 2. If you do mistakenly deactivate your National Grid's shared access to the property, that will also disable National Grid access to the gas meters that we have been populating with usage data. In this case, you will need to reshare not just the property at "Full Access," but also the meters named "Natural Gas Main Meter" and "Gas Cooking Meter" (if applicable).
- 3. After you have re-shared your property, you will need to contact National Grid Benchmarking Portal Call Center at the email or phone number below to validate that the re-share has been accepted before filling out a new National Grid webform (<u>www.ngrid.com/epm</u>) to restart usage data upload process again.

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

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

MA Customers NE.energyefficiency@nationalgrid.com

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

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7

How to Register on the National Grid Web Site

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

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

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

Metro New York Change Location Gas	💼 For your Business 👻					Gas Emergencies	Our Company	Contact Us	Q
nationalgrid		Your Account	Billing & Payments	Save Energy & Money	Safety & Reliability	Pay You	ur Bill 📍	Sign In / Regi	ister

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

NY Metro and Long Island Customers

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

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

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

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

NYC, LI and Upstate NY Customers – energyefficiency@nationalgrid.com MA Customers – NE.energyefficiency@nationalgrid.com Or call 855-563-7448, 8:00 am to 5:00 pm EST Monday through Friday

MA and UNY Customers

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

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

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

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

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

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

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

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

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

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

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

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

9

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

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

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

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

Important Information

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

• Deactivating the EPA Portfolio Manager property share link will disable the upload process.

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

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

NYC, LI and Upstate NY Customers – energyefficiency@nationalgrid.com MA Customers – NE.energyefficiency@nationalgrid.com Or call 855-563-7448, 8:00 am to 5:00 pm EST Monday through Friday

National Grid Benchmarking Portal Online Form

To complete the National Grid Benchmarking Portal Online Web Form, enter your EPA Portfolio Manager property ID, username, your email address, your contact information, service address and other required Information.

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

All fields are required unless otherw	ise indicated.
Your Information	
* Note: You are currently on please re-select your location	our Metro NY site. If you are not requesting data for a building in this region on. Enter the Energy Star Portfolio
Portfolio Manager Usernan	Manager Username exactly as it was created (Case Sensitive). If you don't have an Energy Star
E-mail address	Portfolio Manager Username, you can create an account here.
Verify E-mail address	
Phone Number	
Request submitted by	Select ~
First Name	Last Name
Address	
Address 2 (Optional)	
City	Note: All fields must be completed
State	Select V
Zip Code	

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

Uploading whole building aggregate data to EPA Portfolio Manager Visit the National Grid site at **ngrid.com/epm**

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



Uploading whole building aggregate data to EPA Portfolio Manager Visit the National Grid site at **ngrid.com/epm**

Click the "I'm a robot" box.	not	nationalg
k the checkbox b	elow if you're human (anti-spam verification)	
I'm not a robot	reCAPTCHA Privacy - Terms	
ns and conditions	Click the box to confirm that you have read "Terms and Conditions."	le that you have
inderstand and agree to	the terms and conditions	
onic Signature Your Full Name)	s or issues with your web submissions contact The Energy Efficiency team. NE.energyefficiency@nationalgrid.com	To read "Terms and Conditions," select the blue text.
Account Number (10 digit account number with * Note: You are currently or please re-select your locati Account Number	Where do I find this? Nout dashes) Disclaimer Welcome to the National Grid EPA Portfolio Manager Website (the "Website"). This Website is operated by The Brooklyn Union Gas Company and KeySpan Gas East Corporation each d/b/a National Grid ("National Grid" or the "Company") to facilitate uploading of your aggregated energy usage data ("Data") to the United States Environmental Protection Agency ("EPA") Portfolio Manager®, an online tool created and managed by the EPA and used, in part, to measure and track energy consumption ("EPA Portfolio Manager"). Please read this Agreement in full before using the Website. By using the Website you:	Pop up screen display the "Te and conditions.
Account Number (10 digit account number with * Note: You are currently or please re-select your locati Account Number	Where do I find this? Nout dashes) Disclaimer Welcome to the National Grid EPA Portfolio Manager Website (the "Website"). This Website is operated by The Brooklyn Union Gas Company and KeySpan Gas East Corporation each <i>db/a</i> National Grid ("National Grid" or the "Company") to facilitate uploading of your aggregated energy usage data ("Data") to the United States Environmental Protection Agency ("EPA") Portfolio Manager®, an online tool created and managed by the EPA and used, in part, to measure and track energy consumption ("EPA Portfolio Manager"). Please read this Agreement in full before using the Website. By using the Website you: • Agree that you have read this Agreement and National Grid's Privacy Policy and agree to be legally bound by this Agreement and National Grid's Privacy Policy. If you do not agree to the terms contained herein or in National Grid's Privacy Policy, do not use or further access the Website. • Represent that you are one or more of the following:	Pop up screen display the "Te and conditions.
Account Number (10 digit account number with * Note: You are currently or please re-select your locati Account Number Click the checkbox	 Where do I find this? nout dashes) Disclaimer Welcome to the National Grid EPA Portfolio Manager Website (the "Website"). This Website is operated by The Brooklyn Union Gas Company and KeySpan Gas East Corporation each <i>d/b/a</i> National Grid ("National Grid" or the "Company") to facilitate uploading of your aggregated energy usage data ("Data") to the United States Environmental Protection Agency ("EPA") Portfolio Manager®, an online tool created and managed by the EPA and used, in part, to measure and track energy consumption ("EPA Portfolio Manager"). Please read this Agreement in full before using the Website. By using the Website you: Agree that you have read this Agreement and National Grid's Privacy Policy and agree to be legally bound by this Agreement and National Grid's Privacy Policy. If you do not agree to the terms contained herein or in National Grid's Privacy Policy, do not use or further access the Website. Represent that you are one or more of the following: (a) the owner of the building(s) specified on the Web Consent Form found on the Website (suct owner and/or its duly authorized agent, the "Owner", such building(s), the "Building(s)". (b) the Building(s)' Owner's duly authorized agent with the authority to enter into this Agreement (c) the account holder or the National Grid (or its affiliate) account this parement (c) are account conter, duly and expressly authorized in writing by such Customer to enter Customer's Data on such Customer's behalf (Owner and Customer using the Website as or referred to as "you or "your", National Grid and you are referred to herein collectively as the "Parties" and separately as a "Party". 	Pop up screen display the "Te and conditions.
Account Number (10 digit account number with * Note: You are currently or please re-select your locati Account Number Click the checkbox Click the checkbox I'm not a robot Terms and condition By checking the box an read, understand and agree Electronic Signature	 Where do I find this? Noted that the second secon	Pop up screen display the "Te and conditions.
Account Number (10 digit account number with * Note: You are currently or please re-select your locati Account Number Click the checkbox Click the checkbox I'm not a robot Terms and condition By checking the box an read, understand and agree Electronic Signature (Enter Your Full Name) NOTE: If you have any quest • Aal other customers use enter • All other customers use enter	 Where do I find this? Not dashes; Disclaimer Welcome to the National Grid EPA Portfolio Manager Website (the "Website"). This Website is operated by The Brooklyn Union Gas Company and KeySpan Gas East Corporation each db/a National Grid ("National Grid" or the "Company") to facilitate uploading of your aggregated energy usage data ("Data") to the United States Environmental Protection Agency ("EPA") Portfolio Manager®, an online tool created and managed by the EPA and used, in part, to measure and track energy consumption ("EPA Portfolio Manager"). Please read this Agreement in full before using the Website. By using the Website you: Agree that you have read this Agreement and National Grid's Privacy Policy and agree to be legally bound by this Agreement and National Grid's Privacy Policy. If you do not agree to the terms contained herein or in National Grid's Privacy Policy, do not use or further access the Website. Represent that you are one or more of the following: (a) the owner of the building(s) specified on the Web Consent Form found on the Website (suct owner and/or its duiy authorized agent, the "Owner", such building(s), the "Building(s)". (b) the Building(s) Owner's duiy authorized agent with the authority to enter into this Agreement (c) the account holder or the National Grid (or its affiliate) account that contains the Data (such account holder or its duiy authorized representative, the "Customer", or (c) a representative of the Customer, duiy and expressly authorized in writing by such Customer to enter for the Sate and such account. Notional Grid and you are referred to herein collectively as the "Parties" and separately as a "Party.". Agree that any and all information and Data you provide via the Website (including the Website also referred to as "you or "your", National Grid to release Data on your Building(s) to the EPA Portfolio Manager and you at undorized agencies. Agree that National Grid a	Pop up screen display the "Te and conditions.
Account Number (10 digit account number with * Note: You are currently or please re-select your locati Account Number Click the checkbox Click the checkbox I'm not a robot Terms and conditic By checking the box an read, understand and agree Electronic Signature (Enter Your Full Name) NOTE: If you have any quest • Massachusetts customers use end	 Where do I find this? (out dashes) Disclaimer Welcome to the National Grid EPA Portfolio Manager Website (the "Website"). This Website is operated by The Brooklyn Union Gas Company and KeySpan Gas East Corporation each d/ba National Grid ("National Grid" on the "Company") to facilitate uploading of your aggregated energy usage data ("Data") to the United States Environmental Protection Agency ("EPA") Portfolio Manager®, an online tool created and managed by the EPA and used, in part, to measure and track energy consumption ("EPA Portfolio Manager"). Please read this Agreement in full before using the Website. By using the Website you: Agree that you have read this Agreement and National Grid's Privacy Policy and agree to be legally bound by this Agreement and National Grid's Privacy Policy, if you do not agree to the terms contained herein or in National Grid's Privacy Policy, do not use or further access the Website. Represent that you are one or more of the following: (a) the owner of the building(s) specified on the Web Consent Form found on the Website (suct owner and/or its duly authorized agent, the "Owner", such building(s), the "Building(s)". (b) the Building(s) Owner's duly authorized agent with the authority to enter into this Agreement e(the account holder or its duly authorized representative, the "Customer"), or (a) are presentative of the Customer, duly and expressly authorized in writing by such Customer to the subino Edutor and such as referred to as "you or "your", National Grid and you are referred to herein collectively as the "Parties" and separately as a "Party.". Agree that National Grid automatically generate and upload Data for your Building(s) to the EPA Portfolio Manager and you athorize dargen. Agree that National Grid any oyue to tage a to the EPA Portfolio Manager and understand that National Grid will transmit electronically up to 12 months of the most recent Data to the EPA	Pop up screen display the "Te and conditions.
Account Number (10 digit account number with * Note: You are currently or please re-select your locati Account Number Click the checkbox Click the checkbox I'm not a robot Terms and condition By checking the box an read, understand and agree Electronic Signature (Enter Your Full Name) NOTE: If you have any quests • Massachusetts customers use ene	 Where do 1 find this? (but dashes) Disclaimer Weicome to the National Grid EPA Portfolio Manager Website (the "Website"). This Website is operated by The Brooklyn Union Gas Company and KeySpan Gas East Corporation each d/b/a National Grid ("National Grid" or the "Company") to facilitate uploading of your aggregated energy usage data ("Data") to the United States Environmental Protection Agency ("EPA") Portfolio Manager®, an online tool created and managed by the EPA and used, in part, to measure and track energy consumption ("EPA Portfolio Manager"). Please read this Agreement in full before using the Website. By using the Website you: Agree that you have read this Agreement and National Grid's Privacy Policy and agree to be legally bound by this Agreement and National Grid's Privacy Policy. If you do not agree to the trams contained herein or in National Grid's Privacy Policy, do not use or further access the Website. Represent that you are one or more of the following: (a) the owner of the building(s) specified on the Web Consent Form found on the Website (suct owner and/or its duly authorized agent, the "Owner", such building(s). The "Building(s)"). (b) the Building(s) Comer's duly authorized agent, the "Customer"), or: (a) a representative of the Customer, duly and expressly authorized in writing by such Customer also referred to as "you or "your", National Grid and you are referred to herein collectively as the "Partles" and separately as a "Party.". Agree that any and all information and Data you provide via the Website (including the Web is end to represent is true, accurate, complete and correct. Agree that National Grid and pour provide via the Website (including the Web Consent Form) or pursuant to this Agreement is true, accurate, complete and correct. Agree that any and all information and Data you provide via the Website (including the Web is a separately as a "Party.". Agre	Pop up screen display the "Te and conditions

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



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

NYC, LI and Upstate NY Customers – energyefficiency@nationalgrid.com MA Customers – NE.energyefficiency@nationalgrid.com Or call 855-563-7448, 8:00 am to 5:00 pm EST Monday through Friday

National Grid Web Submission Messages

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

	v Tour nome v	Your Business 🗸	Business Partners 🗸	Our Company 🗸	Pay Bill
EPA Portio	0110				
FPA P	ortfolio Ma	nager			
	or trono ma	luger			
Your request for business days to	rour building's energy usage da receive your data. You will rece	ata has been successfully submi eive an email confirming the con	tted to National Grid. No further action ppletion of this data request.!	n is required from you at this time. Plea	se allow up to 5
If you do not rece	ive the email or data within 5	business days, please email us	at the email address noted on the EP	A Portfolio Manager page.	
				e.,,	mit Another Form
				30	

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

Webform Submission Errors

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

System Time	Restriction Error for NYC and MA

(National Grid systen	is not available from	11 pm to 7	ˈam EST)
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national gr	id Massa	achusetts Gas	Report Gas Emergen	cy Report a Power Outage 🕯	Join/Sign In 🗹 Contact Us annal Grid	
Your Account ~	Your Home 🗸	Your Business 🗸	Business Partners 🐱	Our Company 🗸	Pay Bill	
EPA Portfolio EPA Pol	rtfolio Mar	nager	and 7am while we perform scheduled	site updates.		
We know it's a pain an	d apologize for the inconv	enience. Thank you for your pat	tience. We are investigating long-term	solutions to improve availability in t	he future.	feedbac
UK Careers Mobile Pri	vacy Policy Terms & Co	nditions Accessibility Sec	sunty Filings OptOut	Select Language >	e Company, Inc. All rights reserved.	

Property Share Access Level Validation Issue

national gr	id Upsta	te NY	Report Gas Emergen	icy Report a Power Outage 🗄	Join/Sign In 🗹 Contact Us	
Your Account 🗸	Your Home 🗸	Your Business 🗸	Business Partners 🗸	Our Company 🗸	Pay Bill	
EPA Portfolio EPA Po Pour recently su property with us in EN gas and/or electric us	rtfolio Mar bimited a data request to d ERGY STAR® Portfolio Ma age data.	nager obtain your building's gas and/o anager®. Please complete the p	r electric usage data from National Gr property share request and grant Nation	id. We were unable to verify that yo onal Grid 'edit' access so that we c	ou have shared your an upload your building's	feedback
UK Careers Mobile Pr	vacy Policy Terms & Co	nditions Accessibility Sec	curity Filings Opt Out	Select Language >	I 🔽 👖 🔠 🖸	

Account Validation Issue

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Successful Submission - Consent Form Required

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

Your Account 🗸	Your Home 🗸	Your Business 🗸	Business Partners 🗸	Our Company 🗸	Pay Bill
EPA Portfolio					
EPA Por	rtfolio Ma	nager			
We have received you	r requirest and have validat	and it against our sustame. In or	dar to complete your data load roome	t you must provide us with Consent	to do so
Please download and i	return the consent form	or contact our Energy Efficiency	y Team at National Grid.	s, you must provide us with consent	10 00 50.
				S	ubmit Another Form

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

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

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

Additional Historical Usage Data Upload Option

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

To request additional usage data:



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

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

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

Step 1:

- Provide EPA Portfolio Manager username.
- · Select the years that you want additional aggregated usage information.
- Enter your EPA Portfolio Manager property ID for which you are requesting additional aggregated usage information.
- Click confirmation that you have an active EPA property share with National Grid.

Note: This webform is for individual property usage requests only.

Additional historical Usage data upload online form

Building owners that have already received their prior usage data and maintained an active portfolio manager property share can use the below form to request for two (2) additional years of aggregate whole building usage information.



Step 2:

• Click the anti-spam verification box:



Step 3:

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



National Grid Benchmarking National Grid Benchmarking Portal

Frequently Asked Questions

1) What is EPA's ENERGY STAR[®] PORTFOLIO MANAGER[®] (EPM)?

The Energy Star Portfolio Manager (EPM) is a federal website in the United States, managed by the Environmental Protection Agency (EPA). It is a web-based energy management tool that allows building owners and property managers to monitor and evaluate energy and water usage across a portfolio of buildings. Additionally, EPA Portfolio Manager enables users to estimate their carbon footprint, track energy management objectives over time, and pinpoint strategic opportunities for savings.

2) What type of data does National Grid upload into EPM?

National Grid provides annual aggregated usage information and uploads the following files to the EPA'S ENERGY STAR Portfolio Manager site:

Gas

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

Electric

Aggregate electric usage data

3) How long does it take National Grid to accept the EPM share requests?

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

4) Will the EPM send an email to confirm that the share request was accepted?

The EPA'S ENERGY STAR Portfolio Manager does not have an email notification process to notify you that your share request is accepted. Customers should check the connection request in EPA'S ENERGY STAR Portfolio Manager site.

5) How long do I need to wait after submitting a share request to submit a National Grid Benchmarking webform?

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

Resharing Data Request: The resharing process can take up to 48 hours to reconnect after you have contacted the National Grid Benchmarking Call Center. See Question 15 on the resharing process.

National Grid Benchmarking Portal Call Center:

<u>NY Customers:</u> energyefficiency@nationalgrid.com

MA Customers: NE.energyefficiency@nationalgrid.com

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

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

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

7) How many months of data will National Grid provide?

National Grid will provide 12 calendar months of aggregate usage information per service address. *Please note: We do not provide block and lot property usage information*.

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

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

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

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

10) Does National Grid provide quarterly or monthly usage data updates?

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

11) How long will the quarterly uploads last?

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

- **12) Is there a cost associated with using the new National Grid Data Upload process?** No, this is a free service offered to National Grid customers.
- 13) Is the usage information provided based on a per meter basis or per building? National Grid provides aggregate whole building usage information.

14) Who is required to submit Energy Usage Release Forms?

In MA and UNY regions:

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

Upstate NY Customers: energyefficiency@nationalgrid.com

MA Customers: NE.energyefficiency@nationalgrid.com

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

In NYC and LI: Customers are not required to submit an Energy Usage Release Form; only online consent is required.

15) What happens if I mistakenly unshare our EPM property share with National Grid?

If you mistakenly remove National Grid's shared access to the property, it will break National Grid access to the gas meters that we have been populating with data. You will need to reshare not just the property at "Full Access" but also the meters named "Natural Gas Main Meter" and "Gas Cooking Meter" (if applicable to restart the usage data upload process).

After you have reshared your property in EPA'S ENERGY STAR Portfolio Manager site you will need to contact the National Grid Benchmarking Portal Call Center at the following email or phone number and provide them with the affected virtual meter ID number(s. You will also need to submit a new National Grid webform at ngrid.com/epm after the reshare connection has been accepted to restart the usage data upload process.

National Grid Benchmarking Portal Call Center:

<u>NY Customers:</u> energyefficiency@nationalgrid.com <u>MA Customers:</u> NE.energyefficiency@nationalgrid.com Or call **855-563-7448**, 8:00 am to 5:00 pm EST Monday through Friday

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

Yes, after you reshare your EPA'S ENERGY STAR Portfolio Manager property share access, you will need to fill out a new National Grid webform before the data upload process can resume.

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

National Grid systems is designed to provide prior year aggregate usage data. Customers that submitted their data requests on or after January 1, 2024.

- Will receive 2023 aggregate usage data.
- Customers that submitted their data request on or before December 31, 2023.
 - Will receive 2022 aggregate usage data.

See Question 15 for additional information on the resharing process.

18) Can National Grid upload individual tenant usage information?

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

19) Can property owners receive usage data on properties with multiple services addresses?

The National Grid Benchmarking portal does not provide aggregate usage data for properties with multiple service addresses. In such situations, property owners must create separate EPA'S ENERGY STAR Portfolio Manager profiles and submit share requests and National Grid Web forms for each individual service address.

If a property owner desires a manual aggregate usage report for properties with multiple service addresses, they need to obtain Energy Usage Release Forms from each service address. These signed forms should then be submitted to the National Grid Benchmarking Call Center.

NY Customers: energyefficiency@nationalgrid.com

MA Customers: NE.energyefficiency@nationalgrid.com

For customers who require aggregate usage data for multiple years, kindly indicate the number of usage years in the body of the email.

Appendix

Creating an ENERGY STAR® Portfolio Manager Account:

STEP 1: How to register an EPA Portfolio Manager account

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

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

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

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		ABOUT ENERGY STAR PARTNER RESOURCES	
	The simple	choice for energy efficiency.	
energy	ENERGY EFF	CIENT ENERGY SAVINGS ENERGY EFFICIENT ENERGY STRATEGIES FOR	
ENERGY STAR	produ	cts at home new homes buildings & plants	
Home > Buildings & Plants	» Owners and m	anagers » Existing buildings » Use Portfolio Manager	
Buildings & Plar	nts	about us 🛛 press room 🗌 help desk 🛃 portfolio manager login	
Owners and managers	Service prov	iders Program administrators Tenants Tools and Resources Training	
Evisting buildings			
Learn the benefits	•	Portfolio Manager®	
Get started	×	The most-used energy measurement and tracking tool for commercial buildings.	
Use Portfolio Manager	*	Use Portfolio Manager	
How Portfolio Manag save	er helps you	You've heard it before: you can't manage what you don't measure. That's why EPA	
The benchmarking st	arter kit	created ENERGY STAR Portfolio Manager®, an online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions. Use	
Identify your property	type 🕨	it to benchmark the performance of one building or a whole portfolio of buildings, all ENERGY STAR*	
Enter data into Portfo	lio Manager	in a secure online environment. Portfolio Minager®	
The data quality chec	ker	Not sure if Portfolio Manager is for you? It is!	
How Portfolio Manag calculates metrics	er 🕟	You can use Portfolio Manager to manage the energy and water use of any building.	
Interpret your results		Seriously. Any building. K-12 school? Check. Office building? Check. Stadium? Check Register now	
Verify and document savings	your	We could keep going. All you need are your energy bills and some basic information about your building to get started. Log in	
Share and request da	ta	Are you designing a new commercial building? You can also use Portfolio Manager	
Updates to ENERGY with CBECS data	TAR scores	to set your energy use target and see how your estimated design energy status up against similar existing buildings nationwide. Forgot pessword?	
Get help accessing ye data	our utility	Portolio Mangar"	
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Save energy	÷		
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B. Fill out the required information (marked by a red asterisk). Note that the username and password should not contain any special characters or spaces. An email will be sent to you for verification after you save your profile.

Welcome to Portfolio Manager	ENERGY STAR Buildings Homepage
The username and/or password you entered is not correct. Please try again.	
Username:	
Password:	Portfolio Manager
Click have to grade a	These links provide more information from ENERGY STAR and are not available in French.
Create a New Account	

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

Help | Login Language: English | Français

Already have an account? Sign In Here

PortfolioManager®

	ount	
Accessing Your A	ccount	Getting Started
Username: Password:	* Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special	Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.
Confirm Password:	characters (such as *, #, %, etc.).	
About Yourself		Accounts for Organizations
First Name:	*	If you are creating an account that you intend to use as your organization's account, then you may want to
Last Name:	*	consider entering your organization name in the first an last name fields in order to make it easier for other Portfolio Manager users to find your organization.
Job Title:	*	Example: First Name: Company ABC, Last Name: Web Services Division
Email:		
Email: Confirm Email:	**	
Email: Confirm Email: Phone:	* Note: We never share your email address with third parties.	
Email: Confirm Email: Phone: Country:		
Email: Confirm Email: Phone: Country: Language:		
Email: Confirm Email: Phone: Country: Language: Reporting Units:	Note: We never share your email address with third parties. * Select Country English © Conventional EPA Units (e.g., kBtu/ft²) © Metric Units (e.g., GJ/m²)	
Email: Confirm Email: Phone: Country: Language: Reporting Units: Street Address:	 Note: We never share your email address with third parties. Note: We never share your email address with third parties. Select Country Select Country English Conventional EPA Units (e.g., kBtu/ft²) Metric Units (e.g., GJ/m²) 	
Email: Confirm Email: Phone: Country: Language: Reporting Units: Street Address: City/Municipality:	 Note: We never share your email address with third parties. * * Select Country English Conventional EPA Units (e.g., kBtu/ft²) Metric Units (e.g., GJ/m²) * 	
Email: Confirm Email: Phone: Country: Language: Reporting Units: Street Address: City/Municipality: State/Province:	 Note: We never share your email address with third parties. Note: We never share your email address with third parties. Select Country English Gonventional EPA Units (e.g., kBtu/ft²) Metric Units (e.g., GJ/m²) Metric Units (e.g., GJ/m²) Select ▼ 	

Organization Name:	*	If you have more than one "primary business," just pi the best option. Portfolio Manager will determine your category for a score based on the information, like
Primary Business or Service of Your Organization:	* Select Primary Business or Service V	square footage, that you enter for each of your prope uses.
Is your organization an ENERGY STAR Partner?	© Yes ⊛ No	
Searchability in Portfo	olio Manager	Connecting with Others in Portfolio
Can other people search for you and send you a connection request?	⊛ Yes ⊙ No	You can connect with other people in Portfolio Manag to easily share information. Your account must be searchable in order for others to send you a connecti- request.
Confirm Your Identity		
Please confirm that you are a human	I'm not a robot	

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

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

email has been sent to the email address provided with further instructions to finish creating your acco hin 24 hours. If you don't see the email in your inbox, check your Spam or Junk folder.	unt. This includes a link to activate your account
Nelcome to Portfolio Manager	
elping you track and improve energy efficiency across your entire portfolio of properties.	Buildings Homepage
Username: *	Take a Training
Efotod my username, Sign In	Dertfolio Manager
Create a New Account	These links provide more information from ENERGY STAR and are not available in French.
to are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to aud iminal and civil penalties. Use of the system indicates consent to monitoring and recording.	It. Unauthorized use of the system is prohibited and subject to

STEP 2: How to add a property to EPA Portfolio Manager

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

A. Select "Add a Property."

Portfolio	Sharing	Reporting	Recognition				
Source EUI	Properties (3 Add a Property Trend (kBtu/ff	³⁵⁾	Welcome to A Now you can "view". We hu these metrics need to be re	Portfolio Views! see an overview of your ave set up one view to ge s, please <u>Refresh Metrics</u> freshed to see your mosi	portfolio's performanc et you started. Energy or, you can <u>set up yo</u> t recent metrics.	e right from this p Highlights. If you ur own customize	age by using a would like to see <u>d views</u> . Views Clear Message
1.5			Dashboard			Search b	y ID or Name
1			Please <u>refresh</u> to s	ee your current metrics.			
0.5			View All Properties	(35) V Energy H	Highlights	Refre	sh Metrics
			Add/Edit/Delete Gro	ups Add/Edit/	Delete Views		
0 2008 2	2008 2010 201	2 2014 2016	Name	Energy Current Date *	ENERGY STAR Score	Site EUI (kBtu/ft²) +	Source EUI (kBtu/ft²) +
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Set a phelp m	portfolio baseline neasure progress.	and/or target to					
Add san Up to fir populat	mple properties to ve sample proper ed data will be ac	o your account. rties with pre- dded to your					

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

erties co lings. Sin monitorir	a Property: Let's Get Started! me in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a la ce there are so many choices, Portfolio Manager can walk you through getting your property up and running, ng your energy usage and pursue recognition!	arge medical complex with lots of When you're done, you'll be ready to
CME- ANK	Your Property Type We'll get into the details later. For now, overall, what main purpose does your property serve? Multifamily Housing Learn more about Property Types.	Tip To set up a property, you'll need information such as gross floor area and operating hours.
2	Your Property's Buildings How many physical buildings do you consider part of your property? None: My property is part of a building One: My property is a single building More than One: My property includes multiple buildings (Campus Guidance) How many?	Tip Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.
$\boldsymbol{\lambda}$	Your Property's Construction Status Is your property already built or are you entering this property as a construction project that has not yet been completed? Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition. Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project. Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.	You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio- level metrics, charts and table or not, depending what your needs are. This can be configured on your <u>Account</u> <u>Settings</u> .
	Get Started!	<u>Seung</u> .

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

Portfo	R [®] Welcome National Grid Web Services: <u>Acco</u>	unt Settings Notifications ¹²⁰ Contacts Help Sign Ou
Set Up a Prop Tell us a little bit more abor	erty: Basic Property Information ut your property, including a name that you will use to look up your property and its addr	ess.
About Your Prop	erty	🕖 Тір
Name:	* Test Customer	The name you choose for your property does not have to be unique. But, it may
Country:	* United States	make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.
Street Address:	* One Metro Tech Center	
City/Municipality:	* Brooklyn	Please Note: Street address must match the service address found on your
State/Province:	* New York	National Grid bill.
Postal Code:	* 11201	
Year Built	* 2008	
Gross Floor Area:	* 70,000 Sq. Ft. ▼ ■ Temporary Value Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. Details on what to include.	
Irrigated Area:	Sq. Ft. V	
Occupancy:	* 100 🔻 %	
		🗾 Тір
Do any of these	apply?	Answering these simple questions will help us guide you in entering your property correctly.
My property has a My property has a	gy consumption includes parking areas heated swimming pool ne or more retail stores	
 My property has o My property has n 	ne or more restaurants/cafeterias ursing/assisted care units	
Back	Continue	

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

et up a Property: sed on what you/ve told us so fi	How is it us	ed? as set up your prope	ty. Fill in the tables below	to provide more deta	alied information on h	ow your prop
sed.						
Basic Information						
Name:	Test Customer		Country:	US		
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Year Built	2008			1.71.577903.00		
Property consists of:	0 building					
						Ed
			Add Anoth	er Type of Use		
ligibility for an ENERGY STAR 2 units or more per building 20 units or more per proper Greater than 75% occupant Communities of single-family ho ing as the single-family ho ing spece in each unit (includi	score and certification (ty/campus C/ by homes are not eligib mes are less than 25% Include all buildings th iss Floor Area should in ray occupied and uncou	for Multifamily prope le. If your property is a of the total GFA. at are part of the mult holude all fully-enclos	rites: a mix of multifemily and si itamily property, including led space within the outsid common areas (e.g. lobbi	ngle-family homes, b any separate manag é surfaces of the ext s., offices, communit	he property would still ement offices or othe erfor weils of the built by rooms, common kil	i be eligible a r buildings th ding(s) includ ichens, fitness
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Igibility for an ENERGY STAR 2 units or more per building 20 units or more per building ing species in each unit (includi communities of single-family ho ing specie in each unit (includi coms, indoor pools), haliways, i pen al: stairweits, breezeways Property Use Detail 6 Groce Floor Area	score and certification tylicampus C/ y homes are not eligib intes are less than 25% include all buildings thi ass Filoor Area should i ng occupied and unoo stainvella, elevator sne and other similar area	for Multifemily proper le. If your property is or the total GFA. at are part of the multi- cuide all fully-enclose upded unity, interior fas, connecting condi- as that are not fully-en- Value * [70,000]	rites: a mix of multifamily and si ifamily property, including led space within the outsid common areas (e.g. lobbi lors between buildings, sto notosed should not be inclu-	ngle-family homes, b any separate manag e surfaces of the ext s. offices, communit rage areas, and mero ided in the GFA.	he property would stil ement offices or othe enfor wells of the built yrooms, common kil chenical space such a urrant As Of 112008	i be eligible a er buildings thi ding(s) includ tohens, fitness as a boiler roo Value
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STEP 3: How to connect your EPA Portfolio Manager account to National Grid, and share your Property with National Grid

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

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

Connect with National Grid:

1) Check if National Grid is already a contact.

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

ENERGY STAR	ortfolio	Manag	ler®	Welcome NG Test Property Manager2: <u>Account Sett</u>	ings Notifications ⁶⁰ <u>Contacts</u> <u>Help</u> <u>Sign Out</u>
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- 2) If National Grid is connected, go to Step B below. If not:
 - Click Add Contact.
 - To search for National Grid, enter "National Grid Web Services"
 - Click Search.
 - From the list, locate "National Grid Web Services," then click "Connect".

Search Results

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

Your Sear	ch Criteria	(ee) National Grid Web Services Bench Marking Web Services with National Grid	Connect
Name:	National Grid Web Services	74 44 Page 1 of 1 P> FI 50 V	1 - 1 of 1
Organization			
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al Address	K.		
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Can't find what yo search criteria.	are looking for? Try adjusting your		

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

Send a Cor National Grid Web S this information, plea with them to get start	ervices requires the following infor use contact <u>National Grid Web Sen</u> ted exchanging data.	o <u>National Grid Web Services</u> to Begin Exchanging Data mation in order to exchange data with your property(ies). If you have any questions about how to complete <u>vices</u> . Once your connection request has been accepted, you can share individual properties and/or meters
Terms of Use: Agreement:	None Provided * I agree to my prov <u>Services</u>) Terms of	vider's (<u>National Grid Web</u> of Use. Send Connection Request <u>Cancel</u>
Follow Us	8 f 🛗 in	Contact Us Privacy Policy Browser Requirements ENERGY STAR Buildings & Plants Website

3) Share the Property

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

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

My Shared Properties (17) Share (or Edit Access to) a Property	S	et Up Web Servic Data Exchange	:es/	
My Shared Properties (17)	Sha	re (or Edit Acces a Property	ss to)	
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4) On the "Share Properties for Exchanging Data" page, go to "Select Web Services Provider (Account)," and choose "National Grid Web Services" from the drop-down list.

		Choose Permissions	Set Up Connections	Check Existing Permissions	View Results/ Confirmation
Sometimes it's provider.	really imp	portant to be able to share your pr	roperty with someone else. Use this	s option to set up automatic e	exchange of data with your utility or servic
¢	Select Which w to exch Select w Natio (Natio	ct Web Services Provide web services provider (account) o nange data? You can share multip web services provider from my co onal Grid Web Services	er (Account) do you want to share these properti ble properties at once with a single pontacts book:	es with in order provider. On the req	ke "regular sharing," when you "bulk share" a Web Service Provider, you can only pick ler. This is because the bulk share depends uirements/settings of the provider.
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3000	Choo If you o want to here. O contact	ose Permissions only need to choose one permission give the same permissions for al otherwise, you may assign different ts on the next screen.	on (because you are doing a single Il your shares), you can choose tha nt permissions for different properti	share or you t permission es and/or	
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	0 0 I wa	Remove Access (i.e. remove ex	xisting access to all properties)	individual	

- 5) Go to "Select Properties," and use the drop-down menu to indicate whether you wish to share one property, multiple properties, or all properties with National Grid.
 - If you need National Grid data for just one property, select "One Property" from the drop-down list. Then, you will be presented with a second drop-down list from which you can select the property to share.
 - If you need National Grid data for more than one property, you may choose "Multiple Properties" from the drop-down list. From there, click the button that says, "Select Properties," and a new window will pop up, where you will be prompted to select the properties that you would like to share. Check the boxes next to the property names you wish to share, click "Apply Selection," and you will be taken back to the "Share Properties for Exchanging Data" page. Make sure that the correct number of "Selected Properties" is showing.
- 6) Go to "Choose Permissions" and select the first option, "I want to set permission levels in bulk for all selected properties and meters."
 - From the list of options that appears, select **"Exchange Data Custom Access."** This will launch a new window, where you can set the Access Permissions that will apply to all properties that you are sharing with National Grid.

Select Custom Acc	ess P	ermissions for			
Select the permission leve	el below t	hat you would like to	grant		for
ltem	None	Exchange Data Read Only	Exchang Full Acc	je Data ess	^
Property Information	0	0	۲		
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▼ Energy Meters					
Electric - Grid	۲	0	0		
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Fuel Oil (No. 2)	۲	0	0		
Vater Meters					~
dditional Options:					
ltem				Yes	No
* Share Forward Allow give them any permis right to share with mo	to share sions the	e this property with o at he/she has, includ e.	thers and	۲	R

• Make the following selections:

Property Information: select "Exchange Data Full Access."

Meter Information:

③For each meter displayed, choose "None" – even if existing National Grid meters are listed.

- You do not need to share access to specific energy meters with National Grid. After you have successfully shared your property, National Grid will create one or more new "virtual" meters, into which your aggregate energy consumption data will be uploaded.
- If you do select "Read Only" or "Full Access" at the meter level, this will be ignored by National Grid, and may even be rejected, since meter-level shared access is not needed by National Grid's system. As long as you have provided "Full" access at the property level, then this will be sufficient.
- ✓ Water Meters: select "None."
- ✓ Goals, Improvements, & Checklists: select "None."
- Recognition: select "None."
- Share Forward: select "Yes."
 - Click "Apply Selection," which will return you to the "Share Properties for Exchanging Data" page
- 7) From the "Share Properties for Exchanging Data" page, review your selections and then click "Authorize Exchange."
- 8) If there are any issues with your sharing request (e.g., you attempted to share a property for which you do not have the necessary access rights), EPA Portfolio Manager will alert you and prompt you to make corrections.

Otherwise, you will see a confirmation page that says, "Bulk Share Properties for Exchanging Data: Results." You will also see confirmation of the outgoing shares in the "Sharing Notifications" box on the "Sharing" tab of your EPA Portfolio Manager account.



Bulk Share Properties for Exchanging Data: Results

	Choose Permissions	Set Up Connections	Check Existing Permissions	View Results/ Confirmation
Congratulation	ns! You have successfully sha	red/edited access to your prop	perty(ies).	
A total of 3 share	re requests were sent.			
If you shared pr edits have beer	operties, you will receive a notifi n made, no acceptance is require	cation when your contact has ac	cepted the share. If you edited	access to current permissions, the