

# Benchmarking How-to Guide

## Building Efficiency 305 (BE305)

*Step-by-step compliance instructions for building owners to benchmark building energy and water usage through ENERGY STAR® Portfolio Manager® (Portfolio Manager).*

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For more information, please visit: [www.benchmark305.com](http://www.benchmark305.com)

# Portfolio Manager

## Step 1. Create an Account in ENERGY STAR Portfolio Manager

To comply with Building Efficiency 305 (BE305), covered building owners must create an ENERGY STAR Portfolio Manager account in order to enter and report annual whole-building energy and water usage.

1. Go to the Portfolio Manager sign-up page at: <https://portfoliomanager.energystar.gov/pm/signup>
2. Create a unique username and password. You cannot change your username after your account is created. For organizations with multiple properties, create a "corporate" account which "owns" all of the properties.
3. Enter information "About Yourself" and "About Your Organization"
4. In the box asking "Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?" choose "Yes."
5. Click "Create My Account" at the bottom of the page

Accessing Your Account

Username:

Password:

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

Confirm Password:

About Yourself

First Name:

Last Name:

Job Title:

Email:

Confirm Email:

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

Phone:

Country:

Language:

Reporting Units:  Conventional EPA Units (e.g., kBtu/ft<sup>2</sup>)  
 Metric Units (e.g., GJ/m<sup>2</sup>)

Street Address:

About Your Organization

Organization Name:

Primary Business or Service of Your Organization:

Is your organization an ENERGY STAR Partner?  Yes  No

Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?


Do you want your username to be searchable by other Portfolio Manager users? You must select "Yes" if you want to connect with other users to allow automatic upload of utility data or to share properties.

Yes  No

Confirm Your Identity

Please confirm that you are a human

I'm not a robot

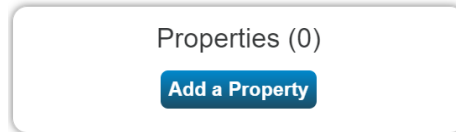
 reCAPTCHA  
Privacy - Terms

[Create My Account](#) [Cancel](#)

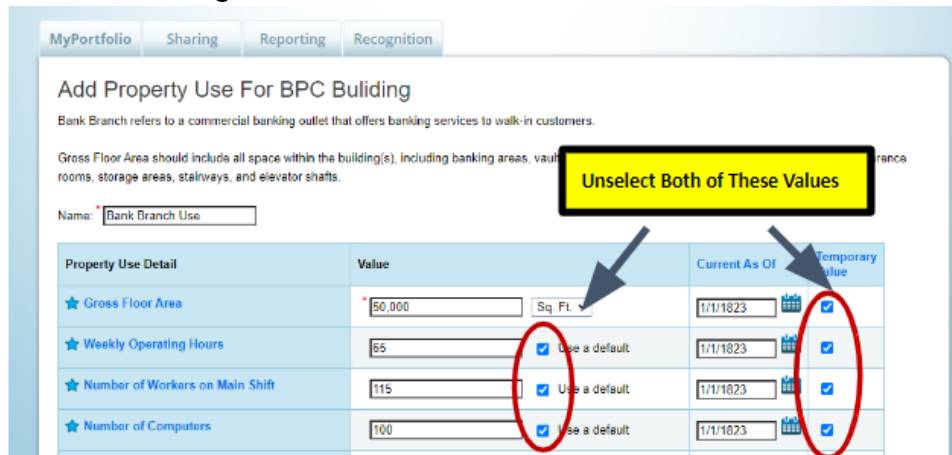
## Step 2. Add a Property in ENERGY STAR Portfolio Manager

Once an account is created, owners can add their building(s) by following these steps:

1. Log in to ENERGY STAR Portfolio Manager: [portfoliomanager.energystar.gov/pm/login](https://portfoliomanager.energystar.gov/pm/login)
2. Click “Add a Property”



3. Enter your property’s applicable characteristics
4. Click on “Get Started!”
5. Enter Basic Property Information
6. Enter your “Miami Building ID”
  - a. To find your ID, visit: <https://buildingid.touchstoneiq.com>
7. Click “Continue”
8. Enter property use details
  - a. You can collect use details from your tenants using the [Data Collection Worksheets](#).
  - b. **Do not** select ‘Use a default.’
  - c. **Do not** select ‘Temporary Value.’
  - d. **Do not** change ‘Current As Of’ dates.



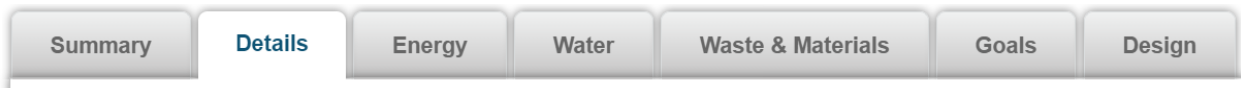
9. Click on “Add Property”

### Step 3. Add your Miami Building ID to Portfolio Manager

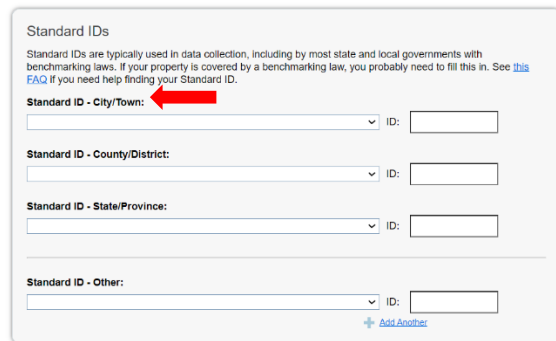
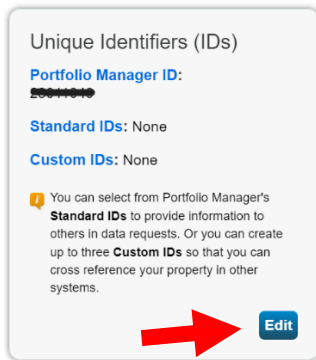
To locate your Miami Building ID, visit: <https://buildingid.touchstoneiq.com/>

Each building subject to BE305 is assigned a unique Miami Building ID. Adding the Miami Building ID to your building is required and ensures the usage reported is attributed to the correct building.

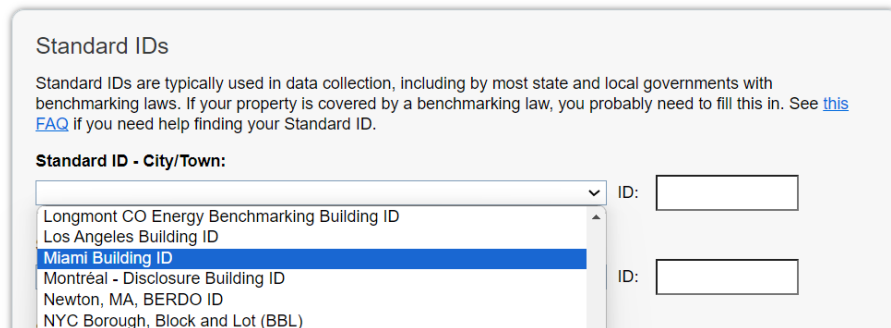
1. Log in to Portfolio Manager. Visit [portfoliomanager.energystar.gov/pm/login](https://portfoliomanager.energystar.gov/pm/login)
2. Select your building from your MyPortfolio Dashboard.
3. Click on the “Details” tab.



4. Locate the “Unique Identifiers (IDs)” box on the left and click “Edit.” After clicking “Edit,” scroll to find the box titled “Standard IDs”, then “Standard ID - City/Town”.



5. Click on the “Standard ID - City/Town” dropdown menu in the box and select “Miami Building ID”.



6. In the empty box next to “Miami Building ID,” enter your Miami Building ID and then click “Save”

Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

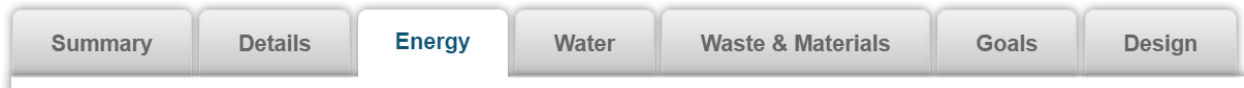
**Standard ID - City/Town:**

Miami Building ID  ID:

## Step 4: Create a Virtual Electricity Meter

If your property consumes electricity, you'll need to create a virtual electricity meter in Portfolio Manager following the steps below:

1. Click on the "Energy" tab



2. Click on "Add A Meter"

Meters - Used to Compute Metrics (0)

[Add A Meter](#)

[View as a Diagram](#)

3. Select "Electric" at the top of the list of energy sources.

Sources of Your Property's Energy

What kind of **energy** do you want to track? Please select all that apply.

Electric

Natural Gas

4. Below the selected "Electric" box, select "purchased from the grid" and enter "1" in the field next to "How Many Meters?"

Sources of Your Property's Energy

What kind of **energy** do you want to track? Please select all that apply.

Electric

purchased from the grid

How Many Meters?

5. Click on "Get Started!"

6. Click in the table to enter the following fields for the meter:
  - a. Units: The units selected should match those shown on your electric bills, the most common is "kWh (thousand Watt-hours)"
  - b. Date Meter became Active: The start date of the earliest data entry in the meter (e.g., if submitting the 2022 report and your first bill of 2021 started on January 1, the date should be entered as 01/01/2021. This date will remain indefinitely until service ends or changes.)

| <input type="checkbox"/> | Meter Name          | Type            | Other Type | Units                     | Date Meter became Active | In Use?                             |
|--------------------------|---------------------|-----------------|------------|---------------------------|--------------------------|-------------------------------------|
| <input type="checkbox"/> | Electric Grid Meter | Electric - Grid |            | kWh (thousand Watt-hours) | 01/01/2021               | <input checked="" type="checkbox"/> |

- Click on “Create Meters”
- Skip the usage entries and click on “Continue”
- With the box checked next to the meter just created, select “These meter(s) account for the total energy consumption” for this property.

Energy Meters

Select all meters to be included in your metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

| <input type="checkbox"/>            | Name<br>Meter ID                                | Type            |
|-------------------------------------|---|-----------------|
| <input checked="" type="checkbox"/> | <a href="#">Electric Grid Meter</a><br>97606866 | Electric - Grid |

Total of 1 meter(s). Tell us what this represents:

These meter(s) account for the total energy consumption for [Test](#) (a single building).

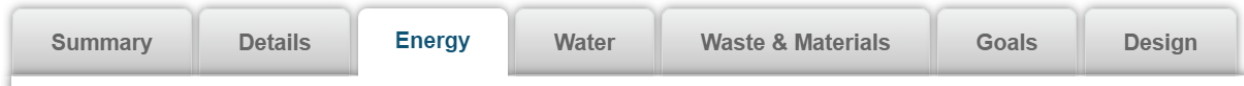
These meter(s) do not account for the total energy consumption for [Test](#) (a single building).

- Click on “Apply Selections”

## Step 5. Create a Virtual Natural Gas Meter

If your property consumes natural gas, you'll need to create a virtual natural gas meter in Portfolio Manager following the steps below:

1. Click on the "Energy" tab.



2. Click on "Add A Meter"

Meters - Used to Compute Metrics (0)

[Add A Meter](#)

[View as a Diagram](#)

3. Select "Natural Gas" from the list of energy sources.
4. Below the selected "Natural Gas" box, enter "1" in the field next to "How Many Meters?"

**Sources of Your Property's Energy**

What kind of **energy** do you want to track? Please select all that apply.

Electric

Natural Gas

How Many Meters?

5. Click on "Get Started!"
6. Click in the table to enter the following fields for the meter:
  - a. Units: The units selected should match those shown on your natural gas bills
  - a. Date Meter became Active: The start date of the earliest data entry in the meter (e.g., if submitting the 2023 report and your first bill of 2022 started on January 1, the date should be entered as 01/01/2022. This date will remain indefinitely until service ends or changes.)

| <input type="checkbox"/> | Meter Name  | Type        | Other Type | Units  | Date Meter became Active | In Use?                             |
|--------------------------|-------------|-------------|------------|--------|--------------------------|-------------------------------------|
| <input type="checkbox"/> | Natural Gas | Natural Gas |            | therms | 01/01/2022               | <input checked="" type="checkbox"/> |


7. Click on "Create Meters"



- Skip the usage entries and click on “Continue”
- With the boxes checked next to the meter(s) just created, select “These meter(s) account for the total energy consumption” for this property.

| <input checked="" type="checkbox"/> | Name<br>Meter ID                                 | Type            |
|-------------------------------------|--|-----------------|
| <input checked="" type="checkbox"/> | <a href="#">Natural Gas</a><br>101098583         | Natural Gas     |
| <input checked="" type="checkbox"/> | <a href="#">Electric Grid Meter</a><br>100121918 | Electric - Grid |

**Total of 2 meter(s).** Tell us what this represents:

- 
- These meter(s) account for the total energy consumption for [Test](#) (a single building).
  - These meter(s) do not account for the total energy consumption for [Test](#) (a single building).

- Click on “Apply Selections”

## Step 6. Create a Virtual Water Meter

If your property consumes water, you'll need to create a virtual water meter in Portfolio Manager following the steps below:

1. Click on the "Water" tab.




2. Click on "Add A Meter"

Meters - Used to Compute Metrics (0)

[Add A Meter](#)

[View as a Diagram](#)

3. Below the selected "Municipally Supplied Potable Water" box, select "Mixed Indoor/Outdoor" and enter "1" in the field next to "How Many Meters?" Select "Potable: Mixed Indoor/Outdoor" to report potable indoor usage and irrigation usage together. Select both indoor and outdoor instead of "mixed indoor/outdoor" if you want this usage separated out or have multiple meters.

 Your Property's Water Usage

What kind of [water](#) do you want to track? Please select all that apply.

Municipally Supplied Potable Water

- Indoor
- Outdoor
- Mixed Indoor/Outdoor

How Many Meters?

Municipally Supplied Reclaimed Water

Well Water

Other:

4. Click on "Get Started!"

5. Click in the table to enter the following fields for the meter:

- a. Units: The units selected should match those shown on your water bills
- b. Date Meter became Active: The start date of the earliest data entry in the meter (e.g., if submitting the 2023 report and your first bill of 2022 started on January 1, the date should be entered as 01/01/2022. This date will remain indefinitely until service ends or changes.)

| <input type="checkbox"/> | Meter Name                          | Type                          | Other Type | Units        | Date Meter became Active | In Use?                             |
|--------------------------|-------------------------------------|-------------------------------|------------|--------------|--------------------------|-------------------------------------|
| <input type="checkbox"/> | Potable: Mixed Indoor/Outdoor Meter | Potable: Mixed Indoor/Outdoor |            | Gallons (US) | 01/01/2022               | <input checked="" type="checkbox"/> |

6. Click on "Create Meters"

7. Skip the usage entries and click on “Continue”
8. With the boxes checked next to the meter(s) just created, select “These meter(s) account for the total water consumption” for this property.

Water Meters

Select all meters to be included in your metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

| <input type="checkbox"/>            | Name<br>Meter ID   | Type                          |
|-------------------------------------|--|-------------------------------|
| <input checked="" type="checkbox"/> | <a href="#">Potable: Mixed Indoor/Outdoor Meter</a><br>142726950 | Potable: Mixed Indoor/Outdoor |

Total of 1 water meter(s). Tell us what these meter(s) measure:

- \*  These meter(s) account for the total water consumption for [Building\\_1](#) (a campus of 2 buildings).
- These meter(s) do not account for the total water consumption for [Building\\_1](#) (a campus of 2 buildings).

9. Click on “Apply Selections”

# Utility Data

## Step 7. Obtain whole-building utility data:

For more information on obtaining your energy data to upload into Portfolio Manager, please visit: <https://www.benchmark305.com/utility-data>

### 3 Ways to Input Utility Bills to Portfolio Manager:

#### Auto-Upload

- If your utility provider offers auto-upload of your usage data, follow your provider's instructions to setup. Once established and your data has been uploaded into your meters, proceed to [Step 8. Run the Data Quality Checker](#)

#### Spreadsheet

- If your utility provider offers your usage data in a spreadsheet to upload, proceed to [Step 7a: How-to Upload Energy Usage by Spreadsheet](#)

#### Manual Entry

- If your utility provider does not offer auto-upload or a spreadsheet, proceed to [Step 7b: How-to Manually Enter Building Usage](#)

## Step 7a. Upload Energy and Water Usage by Spreadsheet

If you obtain whole-building energy and/or water data from your provider in a spreadsheet format, follow the instructions below to upload that spreadsheet into Portfolio Manager.

Building owners must report the previous calendar year (Jan 1 through Dec 31) of whole-building energy and water usage to the City of Miami on an annual basis. Now that you have added your one virtual meter per energy source you are able to upload a spreadsheet of energy or water usage. The spreadsheet must be a templated single-meter spreadsheet provided by Portfolio Manager (see below). If the spreadsheet your utility provided does not match the Portfolio Manager template, it will not be formatted in the correct way and the data will not be uploaded accurately. If you received energy usage data in a different format, it will need to be reformatted into the below templates:

[Electric data single-meter spreadsheet](#)  
[Natural gas data single-meter spreadsheet](#)  
[Water single-meter spreadsheet](#)

### Confirm Data is Entered Properly in the Spreadsheet and Upload into Your Virtual Meter

1. Confirm all four (4) "Required" columns are filled out completely. Note that "Estimation" should read as "No."

| Start Date (Required) | End Date (Required) | Usage (Required) | Cost (Optional) | Estimation (Required) | Demand (Optional) | Demand Cost (Optional) |
|-----------------------|---------------------|------------------|-----------------|-----------------------|-------------------|------------------------|
| 1/1/2022              | 1/31/2022           | 3654             |                 | No                    |                   |                        |
| 2/1/2022              | 2/28/2022           | 3456             |                 | No                    |                   |                        |
| 3/1/2022              | 3/31/2022           | 3042             |                 | No                    |                   |                        |
| 4/1/2022              | 4/30/2022           | 2456             |                 | No                    |                   |                        |
| 5/1/2022              | 5/31/2022           | 2322             |                 | No                    |                   |                        |
| 6/1/2022              | 6/30/2022           | 2567             |                 | No                    |                   |                        |
| 7/1/2022              | 7/31/2022           | 2896             |                 | No                    |                   |                        |
| 8/1/2022              | 8/31/2022           | 2994             |                 | No                    |                   |                        |
| 9/1/2022              | 9/30/2022           | 2755             |                 | No                    |                   |                        |
| 10/1/2022             | 10/31/2022          | 3089             |                 | No                    |                   |                        |
| 11/1/2022             | 11/30/2022          | 3261             |                 | No                    |                   |                        |
| 12/1/2022             | 12/31/2022          | 3517             |                 | No                    |                   |                        |

Example of filled out electric data spreadsheet for 2022 usage.

2. Save the spreadsheet to your computer (title and location do not matter, as long as you remember where it is saved).
3. Open the relevant virtual meter in Portfolio Manager (electric, gas, district steam, etc.) and click “Choose File”, then locate and select the spreadsheet you just saved.

Monthly Entries

Display Year(s):

|                          | Start Date           | End Date             | Usage kWh (thousand Watt-hours) | Total Cost (\$)      | Estimation               | Green Power              | Demand (kW)          | Demand Cost (\$)     |
|--------------------------|----------------------|----------------------|---------------------------------|----------------------|--------------------------|--------------------------|----------------------|----------------------|
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>            | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |

[Delete Selected Entries](#)  
[Add Another Entry](#)  
[Learn how to copy/paste](#)  
[Delete ALL Meter data for this meter](#)

Upload data in bulk for this meter:

Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

No file chosen

4. Click “Upload” to populate the energy usage data from the spreadsheet into your meter.

- The data will populate into your virtual energy meter (see below). Confirm that the units are entered correctly in the virtual meter for the type of energy you just uploaded. Units of data can be found on your utility bills.

|                          | Start Date | End Date   | Usage kWh (thousand Watt-hours) | Total Cost (\$) | Estimation               | Green Power              | Demand (kW) | Demand Cost (\$) |
|--------------------------|------------|------------|---------------------------------|-----------------|--------------------------|--------------------------|-------------|------------------|
| <input type="checkbox"/> | 01/01/2022 | 01/31/2022 | 3,654.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 02/01/2022 | 02/28/2022 | 3,456.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 03/01/2022 | 03/31/2022 | 3,042.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 04/01/2022 | 04/30/2022 | 2,456.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 05/01/2022 | 05/31/2022 | 2,322.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 06/01/2022 | 06/30/2022 | 2,567.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 07/01/2022 | 07/31/2022 | 2,896.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 08/01/2022 | 08/31/2022 | 2,994.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 09/01/2022 | 09/30/2022 | 2,755.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 10/01/2022 | 10/31/2022 | 3,089.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 11/01/2022 | 11/30/2022 | 3,261.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |
| <input type="checkbox"/> | 12/01/2022 | 12/31/2022 | 3,517.00                        |                 | <input type="checkbox"/> | <input type="checkbox"/> |             |                  |

- Click “Save Bills”

You have now finished uploading data into that meter via the spreadsheet method. Please follow the same steps to upload spreadsheets into other virtual meters if relevant to you.

## Step 7b. Manually Enter Energy & Water Usage

**If you were unable to setup auto-upload or upload data using a spreadsheet for ALL meters, please follow the instructions below to manually enter your usage.**

Building owners must report the previous calendar year (Jan 1 through Dec 31) of whole-building energy and water usage to the City of Miami on an annual basis. Now that you have added your one virtual meter per energy source you are able to manually enter in your usage. The process is the same for all meters. To enter your electricity, natural gas, or water data manually please follow the appropriate steps outlined below for each meter.

### Electric (Manual Entry)

- Gather or request at least 12-months of electric usage from the previous year (e.g., If you are trying to submit your 2023 report, you will need at least 12-months of data that accounts for the entire 2022 calendar year, January 1 - December 31, 2022).
- In Portfolio Manager, select your building from the MyPortfolio Dashboard.

- Click on the “Energy” tab.



- Find your meter in the “Meters - Used to Compute Metrics” table. Click on the electric meter name to open up your meter.

Meters - Used to Compute Metrics (2) [Add A Meter](#)

[Change Meter Selections](#)

[View as a Diagram](#)

| Name<br>Meter ID                                | Energy Type     | Most Recent<br>Bill Date | In Use?<br>(Inactive Date) |
|---|-----------------|--------------------------|----------------------------|
| <a href="#">Electric Grid Meter</a><br>98825779 | Electric - Grid |                          | Yes                        |
| <a href="#">Natural Gas</a><br>101266608        | Natural Gas     |                          | Yes                        |



- Within your meter, click on the “Basic Meter Information” arrow to expand this section.



▸ Basic Meter Information (\*\*click on the arrow to the left to expand this section)

- Verify the meter “Units” match the units your data was provided in. If correct, no further action is needed. If the units of the data differ from the units selected for your meter, click on the “Units” drop down menu and select the correct units to match the data you received.

▾ Basic Meter Information (\*\*click on the arrow to the left to expand this section)

Name: \* Electric Grid Meter [Delete Meter](#)

Meter ID: 117740221

Type: Electric - Grid [Need to change?](#)

Units: \* kWh (thousand Watt-hours) ▼

Date Meter became Active: \* 01/01/2021  Still In Use

- Click “Save Changes”

- Scroll down to view the “Monthly Entries” section and “Click to add an entry”

Monthly Entries

Display Year(s):

|                          | Start Date                            | End Date | Usage kWh (thousand Watt-hours) | Total Cost (\$) | Estimation | Green Power | Demand (kW) | Demand Cost (\$) | Last Upd |
|--------------------------|---------------------------------------|----------|---------------------------------|-----------------|------------|-------------|-------------|------------------|----------|
| <input type="checkbox"/> | <a href="#">Click to add an entry</a> |          |                                 |                 |            |             |             |                  |          |



- Beginning with your earliest bill date, enter that into the “Start Date” box.

|                          | Start Date           | End Date             | Usage kWh (thousand Watt-hours) | Total Cost (\$)      | Estimation               | Green Power              | Demand (kW)          | Demand Cost (\$)     |
|--------------------------|----------------------|----------------------|---------------------------------|----------------------|--------------------------|--------------------------|----------------------|----------------------|
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/>            | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |

The “End Date” will then automatically populate, do not adjust it. Click on the table under “Usage kWh (thousand Watt-hours)” and enter in that months usage.

|                          | Start Date | End Date | Usage kWh (thousand Watt-hours) | Total Cost (\$)      | Estimation               | Green Power              | Demand (kW)          | Demand Cost (\$)     |
|--------------------------|------------|----------|---------------------------------|----------------------|--------------------------|--------------------------|----------------------|----------------------|
| <input type="checkbox"/> | 1/1/2021   | 2/1/2021 | <input type="text"/>            | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |

- Below the table, click “Add Another Entry”. The next months date range will automatically populate, do not adjust it. Add in the usage data for this month. Repeat this step by clicking “Add Another Entry” and entering in your usage until you have, at least, a full 12-months of data.

|                          | Start Date                              | End Date                                | Usage kWh (thousand Watt-hours) | Total Cost (\$)      | Estimation               | Green Power              | Demand (kW)          | Demand Cost (\$)     |
|--------------------------|---|---|---------------------------------|----------------------|--------------------------|--------------------------|----------------------|----------------------|
| <input type="checkbox"/> | 1/1/2021                                | 2/1/2021                                | 12,398                          | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| <input type="checkbox"/> | <input type="text" value="02/01/2021"/> | <input type="text" value="03/01/2021"/> | <input type="text"/>            | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |

✖ [Delete Selected Entries](#)  
+ [Add Another Entry](#)

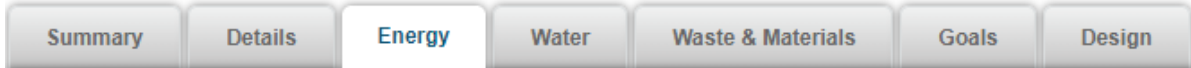


- Click “Save Bills”



## Natural Gas (Manual Entry)

1. Gather or request at least 12-months of gas usage from the previous year (e.g., If you are trying to submit your 2023 report, you will request at least 12-months of data that accounts for the entire 2022 calendar year of January 1 - December 31, 2022).
2. Login to Portfolio Manager and select your building from the MyPortfolio Dashboard.
3. Click on the “Energy” tab.



4. Find your gas meter in the “Meters - Used to Compute Metrics” table. Click on the meter name to open up your meter.

### Meters - Used to Compute Metrics (2)

[Add A Meter](#)

[Change Meter Selections](#)

[View as a Diagram](#)

| Name<br>Meter ID                                | Energy Type     | Most Recent<br>Bill Date | In Use?<br>(Inactive Date) |
|---|-----------------|--------------------------|----------------------------|
| <a href="#">Electric Grid Meter</a><br>98825779 | Electric - Grid |                          | Yes                        |
| <a href="#">Natural Gas</a><br>101266608        | Natural Gas     |                          | Yes                        |



5. Within your meter, click on the “Basic Meter Information” arrow to expand this section.



▶ **Basic Meter Information** (\*\*click on the arrow to the left to expand this section)

6. Verify the meter “Units” match the units your data was provided in. If correct, no further action is needed. If the units of the data differ from the units selected for your meter, click on the “Units” drop down menu and select the correct units to match the data you received.

▼ **Basic Meter Information** (\*\*click on the arrow to the left to expand this section)

Name:  [Delete Meter](#)

Meter ID: 117740220

Type: Natural Gas [Need to change?](#)

Units:

Date Meter became Active:   Still In Use

- Click “Save Changes”
- Scroll down to view the “Monthly Entries” section and “Click to add an entry”

Monthly Entries

Display Year(s):

| Start Date                            | End Date | Usage therms | Total Cost (\$) | Estimation | Last Updated |
|---------------------------------------|----------|--------------|-----------------|------------|--------------|
| <a href="#">Click to add an entry</a> |          |              |                 |            |              |

- Beginning with your earliest bill date and enter that into the “Start Date” box.

| Start Date           | End Date             | Usage therms         | Total Cost (\$)      | Estimation               | Last Updated |
|----------------------|----------------------|----------------------|----------------------|--------------------------|--------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> |              |

The “End Date” will then automatically populate, do not adjust it. Click on the table under “Usage kWh (thousand Watt-hours)” and enter in that months usage.

| Start Date                        | End Date | Usage therms         | Total Cost (\$) | Estimation               | Last Updated |
|-----------------------------------|----------|----------------------|-----------------|--------------------------|--------------|
| <input type="checkbox"/> 1/1/2021 | 2/1/2021 | <input type="text"/> |                 | <input type="checkbox"/> |              |

- Below the table, click “Add Another Entry”. The next months date range will automatically populate, do not adjust it. Add in the usage data for this month. Repeat this step by clicking “Add Another Entry” and entering in your usage until you have, at least, a full 12-months of data.

| Start Date                        | End Date | Usage therms         | Total Cost (\$) | Estimation               | Last Updated |
|-----------------------------------|----------|----------------------|-----------------|--------------------------|--------------|
| <input type="checkbox"/> 1/1/2021 | 2/1/2021 | 4,936                |                 | <input type="checkbox"/> |              |
| <input type="checkbox"/> 2/1/2021 | 3/1/2021 | <input type="text"/> |                 | <input type="checkbox"/> |              |

[Delete Selected Entries](#)  
 [Add Another Entry](#)

- Click “Save Bills”

## Water (Manual Entry)

1. Gather or request at least 12-months of water usage from the previous year (e.g., If you are trying to submit your 2023 report, you will request at least 12-months of data that accounts for the entire 2022 calendar year of January 1 - December 31, 2022).
2. Once received, log in to Portfolio Manager. Visit [portfoliomanager.energystar.gov/pm/login](https://portfoliomanager.energystar.gov/pm/login)
3. Select your building from the MyPortfolio Dashboard.
4. Click on the “Water” tab.



5. Find your water meter in the “Meters - Used to Compute Metrics” table. Click on the meter name to open up your meter.

Water Meters - Used to Compute Metrics (3)

[Add A Meter](#)

[Change Meter Selections](#)

[View as a Diagram](#)

| Name<br>Meter ID   | Water Meter Type              | Most Recent<br>Bill Date | In Use?<br>(Inactive Date) |
|--|-------------------------------|--------------------------|----------------------------|
| <a href="#">Potable Indoor Meter</a><br>128519740                | Potable Indoor                |                          | Yes                        |
| <a href="#">Potable Outdoor Meter</a><br>142696102               | Potable Outdoor               |                          | Yes                        |
| <a href="#">Potable: Mixed Indoor/Outdoor Meter</a><br>129002887 | Potable: Mixed Indoor/Outdoor |                          | Yes                        |



6. Within your meter, click on the “Basic Meter Information” arrow to expand this section.



Basic Meter Information (\*\*click on the arrow to the left to expand this section)

7. Verify the meter “Units” match the units your data was provided in. If correct, no further action is needed. If the units of the data differ from the units selected for your meter, click on the “Units” drop down menu and select the correct units to match the data you received.

Basic Meter Information (\*\*click on the arrow to the left to expand this section)

Name: Potable: Mixed Indoor/Outdoor Meter ✖ Delete Meter

Meter ID: 129002887

Type: Potable: Mixed Indoor/Outdoor

Units: Gallons (US)

Date Meter became Active: 01/01/2021  Still In Use

Date Meter became Inactive:

Custom Meter IDs: None [+ Add Another Custom Meter ID](#)

**Save Changes**

8. Click “Save Changes”

9. Scroll down to view the “Monthly Entries” section and “Click to add an entry”

Monthly Entries

Display Year(s): Show All Years ✕

| Start Date                            | End Date | Usage Gallons (US) | Total Cost (\$) | Estimation | Last Updated |
|---------------------------------------|----------|--------------------|-----------------|------------|--------------|
| <a href="#">Click to add an entry</a> |          |                    |                 |            |              |



10. Beginning with your earliest bill date and enter that into the “Start Date” box.

| Start Date | End Date | Usage Gallons (US) | Total Cost (\$) | Estimation               | Last Updated |
|------------|----------|--------------------|-----------------|--------------------------|--------------|
| 1/1/2022   | 2/1/2022 | 155,280            |                 | <input type="checkbox"/> |              |



11. Below the table, click “Add Another Entry”. The next months date range will automatically populate, do not adjust it. Add in the usage data for this month. Repeat this step by clicking “Add Another Entry” and entering in your usage until you have, at least, a full 12-months of data.

| Start Date                        | End Date | Usage Gallons (US) | Total Cost (\$) | Estimation               | Last Updated |
|-----------------------------------|----------|--------------------|-----------------|--------------------------|--------------|
| <input type="checkbox"/> 1/1/2022 | 2/1/2022 | 155,280            |                 | <input type="checkbox"/> |              |
| <input type="checkbox"/> 2/1/2022 | 3/1/2022 |                    |                 | <input type="checkbox"/> |              |



12. Click “Save Bills”

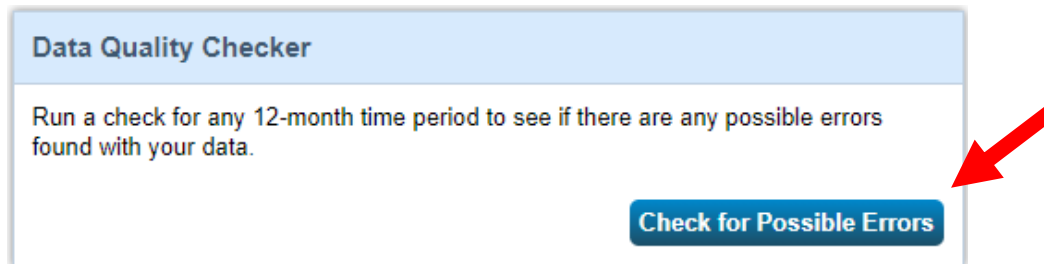
## Step 8. Run the Data Quality Checker

Once you have at least 12 full months of whole-building energy data from the previous calendar year in your meters, run the Data Quality Checker to identify common errors in your report before submitting.

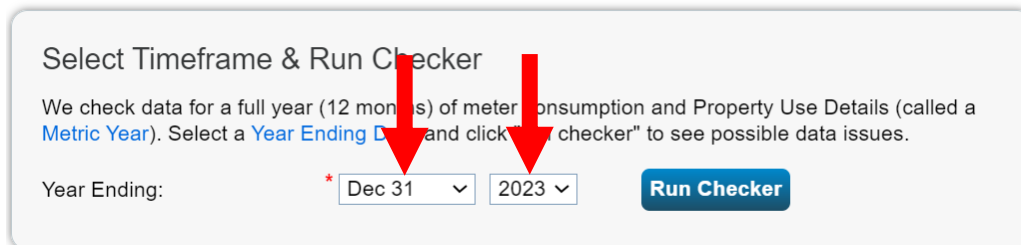
1. Login to Portfolio Manager and select your building from the MyPortfolio Dashboard.
2. On the property's "Summary" tab



Scroll down to find the Data Quality Checker, select "Check for Possible Errors."



3. Select "Dec 31" in the first drop down, then select the previous year in the second drop down (e.g., if the building is submitting the 2024 report, the data reporting year should be set to 2023) then click "Run Checker"

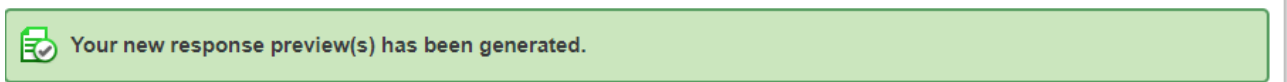




4. Review the list of alerts (if any) and suggestions to address the issue(s).
  - o You can ignore **waste and materials meter** alerts.
5. Following the links in the explanations, make corrections or updates to your property details to address as many alerts as possible.
  - o *Upon submission, all reports are subject to a quality control review and will be rejected if data input errors are found. If errors are found, owners will be notified and must correct those errors, generate an updated response, and resubmit the report to City of Miami. For support, contact the [Building Efficiency 305](#).*
6. Once you have made all applicable changes, re-run the checker to ensure that the alerts have been addressed.

## Step 9. Submit a Benchmarking Report

In order to bring your building(s) into compliance with the City of Miami, you must annually submit your report through ENERGY STAR Portfolio Manager:

1. Open the Data Request Link, found online [here](https://portfoliomanager.energystar.gov/pm/reports/dataRequest/respond/70127?testEnv=false):  
<https://portfoliomanager.energystar.gov/pm/reports/dataRequest/respond/70127?testEnv=false>
2. The data request link will take you to Portfolio Manager. Sign in, if prompted. Once signed in, the link will launch the data request submission page
3. At the bottom of the page, you will need to choose the properties to report using the pop-up window and click “Generate Response Preview”
4. Upon generating the response, you will be taken to the Reporting tab. Find the Miami Data Request at the top of the table.

 Your new response preview(s) has been generated.

| Name   | Status  | Action   |
|--|---|--|
|  [Redacted] Data Request: All [Redacted]<br>(Request from S [Redacted] Office) | Response Preview Generated:<br>2/16/2022 5:48 PM<br>No errors found | <div style="border: 1px solid black; padding: 5px;">           I want to...<br/>           I want to...<br/>           Edit Properties and Timeframe<br/>           Preview Response<br/>           Download Preview in Excel<br/>           Generate an Updated Response<br/>           Send Response <br/>           Delete Response         </div> |

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5. To submit, use the drop-down menu in the “Action” column to select “Send Response.”
6. On the page that appears, you must electronically sign your report by checking the certification box, entering your Portfolio Manager login information, and clicking “E-Sign Response.” You have signed successfully when you see a green alert with a checkmark.
7. Click “Send Data” and confirm submission by clicking “Continue” on the popup. Your report has now been submitted to the City of Miami!
8. After submitting your report, you will receive two emails. The first email will be from Portfolio Manager, confirming you submitted your report. The second email will be sent the next day from Building Efficiency 305, which will notify you of your compliance status. It is important to ensure you receive the confirmation email from Building Efficiency 305 to confirm if you are in compliance or if further action is required.