

Enroll in PSE's EnergyCAP® Tool

PRE-ENROLLMENT TIPS

If your building has **three or more** individual gas meters with separate PSE account holders, you can [create an Aggregate Meter in EnergyCAP](#) and do not need an authorization form.

If your building has **one or two** gas meters gather the following information for each and complete the required authorization process.

- Name as it appears on PSE bill
- Service address as it appears on PSE bill
- Account number as it appears on PSE bill

You are now ready to enroll in PSE's EnergyCAP tool to obtain automated, ongoing uploads to Portfolio Manager for your building's natural gas consumption data. This work is done in and out of Portfolio Manager.

If your building is not served with natural gas from Puget Sound Energy, proceed to [Step 3.3: Centrio Steam](#) on page 42.

If your organization **DOES NOT** already have a PSE EnergyCAP account, you will need to create one to connect your building's gas consumption data with your Portfolio Manager account. **You will need both accounts.**



EnergyCAP will launch a tutorial for new users when you successfully create a new account and login for the first time. The tutorial provides an overview of the system and how to navigate the tool's key features.

If your organization already has a PSE EnergyCAP account for automated uploads to Portfolio Manager you do not need to create a new account.

- **If you are the account holder** of an existing PSE EnergyCAP account for your organization, the building must be added to that existing account. Skip to [Add Your Building in EnergyCAP](#) on page 33.
- **If you are not** the account holder for your organization, ask the primary PSE EnergyCAP account holder to add you as an authorized user to complete the enrollment process for the building you are benchmarking. Contact EnergyCAP@pse.com or see PSE [guidance on adding an authorized user](#) to EnergyCAP accounts.



*If your organization already has a PSE EnergyCAP account for automated uploads to ENERGY STAR Portfolio Manager **do not** create a new Account. Instead skip to [Add Your Building in EnergyCAP](#) on page 33.*

ENERGYCAP®

Register Organization

Submit the following form to register your organization with Puget Sound Energy (PSE) to access EnergyCAP.

Full name

Your organization

Title at your organization (optional)

Email

Phone

Are you the primary account holder or a third party representative?

Name as it appears on PSE bill

Account number(s)

What will you be using this for?

Meter number or address

Additional details (optional)

Contact Puget Sound Energy for questions about this form or to submit supporting documents.

Select **Reporting to Energy Star Portfolio Manager**.

Create a New PSE EnergyCAP Account

- Visit forms.EnergyCAP.com/pse/
- Enter new user information: name, organization, email, phone, relationship to PSE account holder.
- Select **Reporting to ENERGY STAR Portfolio Manager**.
- Select **Register**.

Wait for an email message from PSE EnergyCAP, then follow its instruction to activate your account.

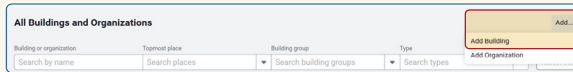
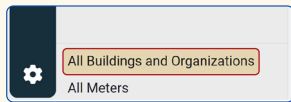
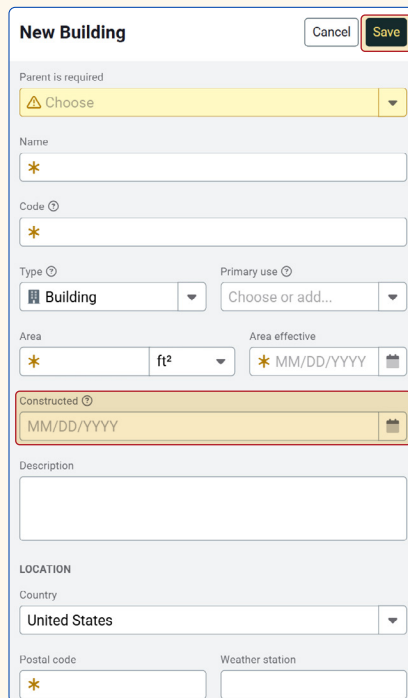


If you do not see an activation email within 24 hours, email EnergyCAP@pse.com to confirm your registration.

Return to PSE EnergyCAP login page.



*PSE may take up to **48 hours** to create your account.*

Enter building information, then select **Save**.



The Parent and Code fields will be automatically populated with your organization and building names. In the Constructed field, enter January 1st of built year to match the dates in Portfolio Manager.

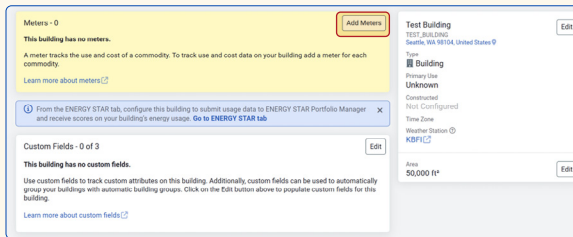
Add Your Building in EnergyCAP

After logging into EnergyCAP, select **All Buildings and Organizations** at the bottom left.

On the next screen, at the top right corner, select **Add** and then **Add Building**.

Enter the same building information you entered when setting up your property in Portfolio Manager. In the Constructed field, enter the date as January 1 (01/01) of the year the building was built.

Select **Save** at the top right.



Meters - 0 **Add Meters**

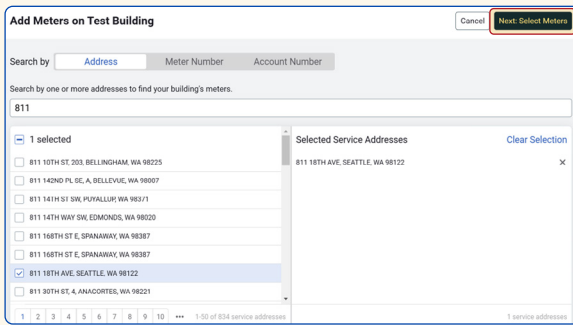
This building has no meters. A meter tracks the use and cost of a commodity. To track use and cost data on your building add a meter for each commodity. [Learn more about meters](#)

From the ENERGY STAR tab, configure this building to submit usage data to ENERGY STAR Portfolio Manager and receive scores on your building's energy usage. [Go to ENERGY STAR tab](#)

Custom Fields - 0 of 3 **Edit**

This building has no custom fields. Use custom fields to track custom attributes on this building. Additionally, custom fields can be used to automatically group your buildings with automatic building groups. Click on the Edit button above to populate custom fields for this building. [Learn more about custom fields](#)

Test Building
TEST BUILDING
Seattle, WA 98104, United States
Type: Building
Primary Use: Unknown
Contributed: Not Configured
Time Zone: Weather Station ID: KDFP
Area: 50,000 ft²



Add Meters on Test Building **Cancel** **Next: Select Meters**

Search by

Search by one or more addresses to find your building's meters.

811

1 selected

Address	Selected Service Addresses
<input type="checkbox"/> 811 10TH ST 203, BELLINGHAM, WA 98225	
<input type="checkbox"/> 811 142ND PL SE, A, BELLEVUE, WA 98007	
<input type="checkbox"/> 811 141H ST SW, PUYALLUP, WA 98271	
<input type="checkbox"/> 811 14TH WAY SW, EDMONDS, WA 98020	
<input type="checkbox"/> 811 168TH ST E, SPANAWAY, WA 98387	
<input type="checkbox"/> 811 168TH ST E, SPANAWAY, WA 98387	
<input checked="" type="checkbox"/> 811 18TH AVE, SEATTLE, WA 98122	811 18TH AVE, SEATTLE, WA 98122
<input type="checkbox"/> 811 30TH ST, 4, AMACORTES, WA 98224	

1-50 of 534 service addresses 1 service address

After selecting **Add Meters**, enter the address, meter number, or account number to search for your meter(s). Select all relevant addresses, then select **Next: Select Meters**.

Add Your Meter(s) in EnergyCAP

Next you will assign the building as the parent of a new or existing gas meter.

On the buildings summary screen, select the **Properties** tab.

If you are setting up meters for the first time, you will see an alert that states, "This building has no meters." Select **Add Meters** in the upper right corner.

Enter the address, meter number, or account number to search for your meter(s). Once complete, an alert will appear noting how many meters are at the service address searched.

If the number listed is less than the total number of gas meters serving the building, add additional service addresses associated with the building by selecting **Back: Select Addresses** at top right corner.

Obtain Puget Sound Energy Meter Usage Data

Select all relevant addresses, then select **Next: Select Meters**. If you are **reporting a multifamily property**, be sure to check—and add if necessary—all associated addresses.

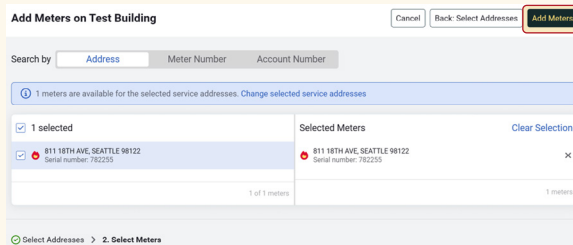
On the next screen, select **Add Meters** in the upper right corner.

Once enrollment is complete, each meter will be listed by number in Portfolio Manager. You may edit the meter name to include additional identifying information, such as tenant, space, or use the meter serves. This additional information will be useful for analyzing energy consumption, evaluating data accuracy, and troubleshooting data reporting errors.

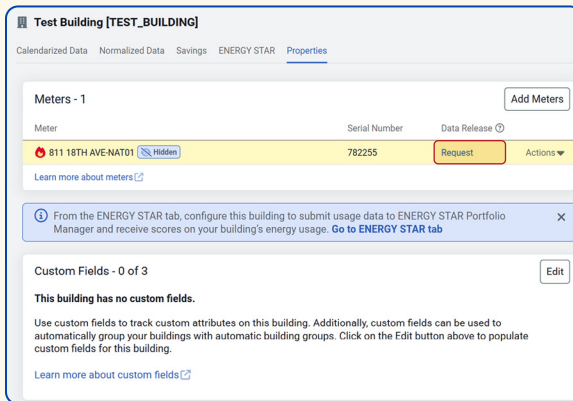


If you know the building is supplied with natural gas and no meters are displayed for the address or account number searched, confirm you accurately entered the requested information.

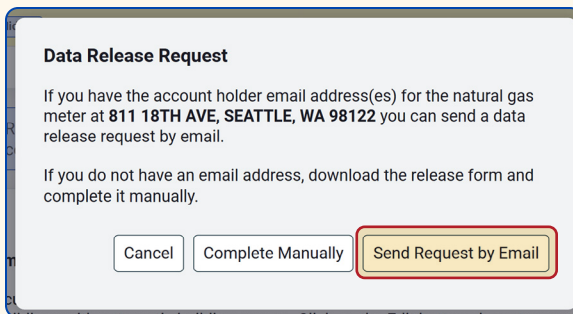
Also, EnergyCAP only displays active meters. If a PSE account has been closed for 6 or more business days (as often occurs with a change of tenants), the meters are considered inactive and will appear in gray. Contact PSE at energycap@pse.com for guidance on how to obtain the data missing from these meters.



Select **Add Meters**.



Request tenants release utility data by selecting **Request** under your building's Properties tab.



Data Release **Option A: Send Request by Email.**

Complete Authorization Form (if prompted)

If your building has fewer than three (3) individual account holders, EnergyCAP will prompt you to complete a release form for each.

Select your property name on the left.

Select the **Properties** tab.

Under the Data Release column, select **Request**.

You can request your tenants to release their PSE data electronically via email **OR** by having them complete a release form which you will then scan and upload into your EnergyCAP account. **Choose one** option below:

Option A: Send data release requests by email:

- Select **Send Request by Email**,
- Provide the tenant's name and email, then select **Submit**.
- Request the tenant approve the authorization request they receive via email.
- Repeat for all tenants.



Create a Virtual Aggregate Meter in EnergyCAP to streamline reporting to Portfolio Manager per these instructions: [Adding an Aggregate Meter](#).



If you have the PSE account name(s), service address(s) and account number(s) as they appear on PSE bill(s) you can bypass the PSE Data Release form requirement.

Data Release Request

If you have the account holder email address(es) for the natural gas meter at **811 18TH AVE, SEATTLE, WA 98122** you can send a data release request by email.

If you do not have an email address, download the release form and complete it manually.

Data Release **Option B**: Select **Complete Manually**, then **Download Form**.

Complete Data Release Manually

To complete a manual data release you must have a scanned copy of a filled out and signed data release form from the account holder.

Complete Data Release Manually

To complete a manual data release you must have a scanned copy of a filled out and signed data release form from the account holder.

After scanning completed forms, upload them by returning to your building's **Properties** tab, selecting **Request**, then **Complete Manually**, and then **Continue**.

Option B: Obtain data releases manually:

- Select **Download Form**.
- Coordinate with tenants to **complete authorization forms** with their service address, PSE account number, and signature.
- Scan the completed authorization forms.
- Log in to your EnergyCAP account and select the **Properties** tab.
- Select **Request**.
- Select **Complete Manually**.
- Select **Continue** to upload the completed authorization forms to EnergyCAP.

Meter	Serial Number	Data Release	
1321 QUEEN ANNE AVE N-NAT	1146090	Active	Actions

Learn more about meters


Authorized meters will show as **Active** under your building's **Properties** tab.

Calendarized Data	Normalized Data	Savings	ENERGY STAR	Properties
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ENERGY STAR is not configured

Submit energy data for your organization's buildings to ENERGY STAR's Portfolio Manager to receive an ENERGY STAR score and benchmark your building's performance.

Get Started [Learn more](#)



LEARN MORE AT energystar.gov

Under the **ENERGY STAR** tab, select **Get Started**, then select **Start Connection Request** and then login.

ENERGY STAR Settings

Before you can submit data to Portfolio Manager you must first invite EnergyCAP to share data with your Portfolio Manager account by following these steps:

1. Create a Portfolio Manager account (if you don't have one).
2. Create properties in Portfolio Manager.
3. Send a connection request to EnergyCAP ENERGY STAR Admin from Portfolio Manager.

Start Connection Request (already sent a connection request)

1. Connect > 2. Verify Connection > 3. Settings



When authorized, the meters will show Active and PSE will populate the most current 24 months of meter consumption data into EnergyCAP. If you do not see your authorization forms processed OR your newly added meters are missing consumption after two (2) business days, contact PSE user support at EnergyCAP@pse.com and copy energybenchmarking@seattle.gov.

Add PSE EnergyCAP as a Contact and Share Building in Portfolio Manager

Once all meters with complete consumption data have been successfully added to your building in EnergyCAP, you are ready to authorize data submission to ENERGY STAR Portfolio Manager.

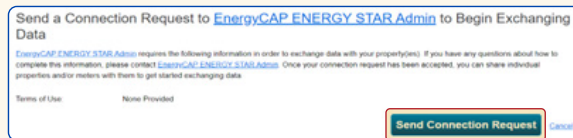
Navigate to your building in EnergyCAP, select the **ENERGY STAR** tab, then select **Get Started**.

Select **Start Connection Request**.

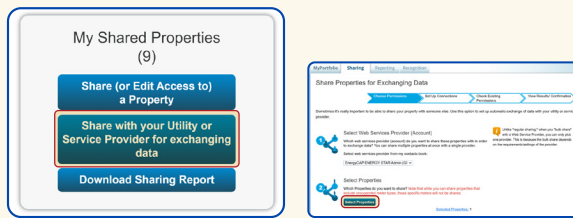
Log into your Portfolio Manager account.

On the next screen, add **EnergyCAP ENERGY STAR Admin (GSS_ENERGYCAP)** as a contact.

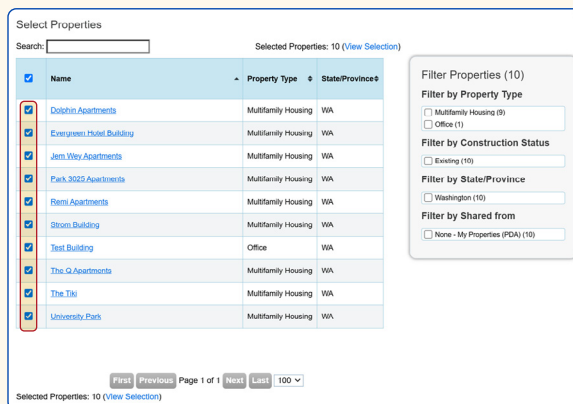
Obtain Puget Sound Energy Meter Usage Data



After logging into Portfolio Manager, select **Send Connection Request**.



Select **Share with your Utility or Service Provider for exchanging data**, then select **Select Properties**.



Check the box next to the properties you wish to share, then select **Apply Selection**.

Select **Send Connection Request**.

Navigate back to your EnergyCAP account in your web browser.

Select the **ENERGY STAR** tab on your properties page.

Select **ENERGY STAR Settings**, then enter your ENERGY STAR Portfolio Manager username.

Select **Verify**.

Return to Portfolio Manager, select the **Sharing** tab and then select **Share with your Utility or Service Provider for exchanging data**.

Select **Web Services Provider (Account)** as EnergyCAP ENERGY STAR Administrator.

Select **Properties**, then select **Apply Selection**.

3 Choose **Permissions**

If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.
- Exchange Data Full Access (with full access to all properties and meters)
- Exchange Data Read Only Access (with read only access to all properties and meters)
- Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)
- Remove Access (i.e. remove existing access to all properties)
- Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

Authorize Exchange Cancel

Select **Bulk Sharing**, then select **Authorize Exchange**.

Test Building [TEST_BUILDING]


Calendarized Data Normalized Data Savings ENERGY STAR Properties

This building's data will not be submitted to ENERGY STAR

Configure this building with ENERGY STAR to submit usage data and receive scores on your building's energy usage, compare your building to others, and benchmark performance.

Use the update ENERGY STAR setup spreadsheet to link this building to your Portfolio Manager property.

Configure Building



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Select **Configure Building**.

Building ENERGY STAR configuration

Cancel Save

Building

Test Building [TEST_BUILDING] Portfolio Manager property
Test Building - 38220092

Submission method

Individual meters Meters per commodity

Meters Use/Day Cost/Day Portfolio Manager meter

Test Building-NAT Aggregate Create in Portfolio Manager

Learn more about ENERGY STAR configuration

Select the property you want to configure.

First select **Bulk Sharing**, then select the **Exchange Data Full Access** option, and then select **Authorize Exchange**.



IMPORTANT Before you can configure your building in EnergyCAP, you must link your building in EnergyCAP to your building in Portfolio Manager.

Configure Building in EnergyCAP

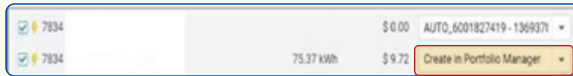
Once PSE is listed as having Exchange Data permissions, navigate back to your building in EnergyCAP and select the **ENERGY STAR** tab.

Select **Configure Building** to link the EnergyCAP property with your ENERGY STAR Portfolio Manager property.

Under select **Portfolio Manager property is required**, select the property you want to configure, then check the boxes next to the active meters.

STEP 3.2

Obtain Puget Sound Energy Meter Usage Data




For each active meter, select **Create in Portfolio Manager**.

Building is ready to submit to ENERGY STAR

You can now submit this building's use data to ENERGY STAR. However, to receive a score this building must meet the following:

- Have at least 12 months of consecutive usage data
- Have a configured floor area in ENERGY STAR that is greater than zero
- Have a configured Primary Use Type in ENERGY STAR



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Confirmation that your building is ready to submit consumption data to Portfolio Manager.

Meters - Used to Compute Metrics (1) Add A Meter

[Change Meter Selections](#)
[View as a Diagram](#)

Meter Name Portfolio Manager Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
AUTO_0333a4e270eb425699c9eebbb5dc8a97d 201174574	Natural Gas		Yes

A successfully added PSE EnergyCAP meter.

From the drop-down menus on the right, for each meter listed select **Create in Portfolio Manager**.

Select **Save**.

Select the **ENERGY STAR** tab to confirm that your building is ready to submit consumption data to Portfolio Manager.

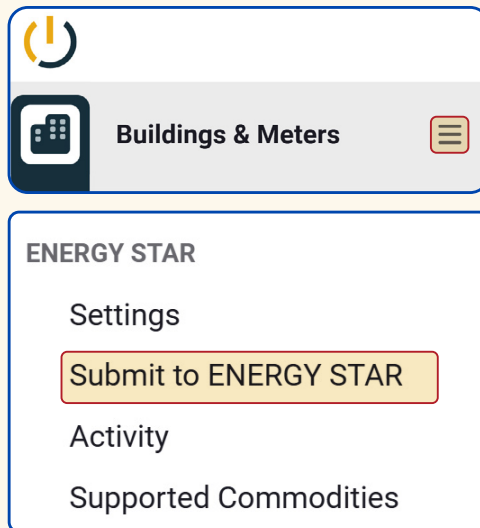
Next, return to Portfolio Manager and select the **Energy** tab to confirm the new PSE meters have been added. Initially you will see an empty PSE EnergyCAP meter—within 48 hours, you should see that data has been loaded. If not, contact PSE at EnergyCAP@pse.com to troubleshoot.



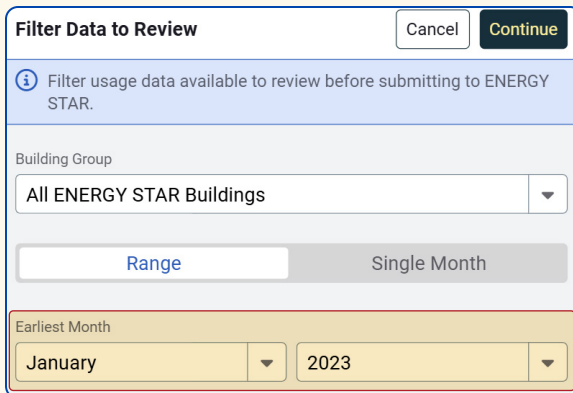
The meters will not show consumption data until you complete the following step to exchange the data.



You should see listed all your properties that you granted Full Access to EnergyCAP. If you do not, confirm that you selected Full Access to EnergyCAP as instructed on the previous page.



Select the **Building & Meters options icon**, then select **Submit to ENERGY STAR**.



For the **Earliest Month** drop-down menu, select **January of the previous year**.

Submit Consumption Data in EnergyCAP to Portfolio Manager

Return to EnergyCAP and select the **Building & Meters options icon** (3 lines at right).

Select **Submit to ENERGY STAR**.

On the next screen, on the Earliest Month drop-down menu, select **January of the previous year**. Leave everything else as-is, then select **Continue**.

Select **Continue**.

Obtain Puget Sound Energy Meter Usage Data



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

[Change Meter Selections](#)
[View as a Diagram](#)

Meter Name Portfolio Manager Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
400_maynard_ave_s_04192013 5802143	Electric - Grid	09/30/2024	Yes
AUTO_6000275566 197093993	Natural Gas	11/01/2024	Yes

[Download Annual Totals by Meter](#)

Select **Natural Gas**.

Monthly Entries

Display Year(s): 2024

Start Date	End Date	Usage (therms)	Total Cost (\$)	Estimation	Last Updated	
<input type="checkbox"/>	12/1/2023	1/1/2024	365.88	340.78	<input type="checkbox"/>	10/19/2024 EnergyCAP ENERGY STAR Admin
<input type="checkbox"/>	1/1/2024	2/1/2024	341.04	343.01	<input type="checkbox"/>	10/19/2024 EnergyCAP ENERGY STAR Admin
<input type="checkbox"/>	2/1/2024	3/1/2024	421.68	478.08	<input type="checkbox"/>	10/19/2024 EnergyCAP ENERGY STAR Admin
<input type="checkbox"/>	3/1/2024	4/1/2024	353.06	404.32	<input type="checkbox"/>	10/19/2024 EnergyCAP ENERGY STAR Admin
<input type="checkbox"/>	4/1/2024	5/1/2024	337.38	411.89	<input type="checkbox"/>	10/19/2024 EnergyCAP ENERGY STAR Admin
<input type="checkbox"/>	5/1/2024	6/1/2024	347.25	489.76	<input type="checkbox"/>	10/19/2024 EnergyCAP ENERGY STAR Admin
<input type="checkbox"/>	6/1/2024	7/1/2024	339.51	494.65	<input type="checkbox"/>	10/19/2024 EnergyCAP ENERGY STAR Admin
<input type="checkbox"/>	7/1/2024	8/1/2024	348.95	517.27	<input type="checkbox"/>	10/19/2024 EnergyCAP ENERGY STAR Admin
<input type="checkbox"/>	8/1/2024	9/1/2024	406.13	667.11	<input type="checkbox"/>	10/19/2024 EnergyCAP ENERGY STAR Admin

Monthly entries populated with natural gas consumption and cost data.

Navigate back to your building in Portfolio Manager, then under the energy type column, select **Natural Gas**.

Congratulations! Monthly entries should now be populated with natural gas consumption and cost data.



*If you don't see complete data for the required reporting year in Portfolio Manager, return to EnergyCAP to confirm you selected **January of the previous year** as the starting date for automatic uploads from EnergyCAP to Portfolio Manager.*



After the building is successfully enrolled in automated data exchange, PSE will send meter data from EnergyCAP to Portfolio Manager every month.



If you only have one building, you will see only it listed under Building Group. If your organization has multiple buildings, from the Building Group drop-down menu select the building for which you want to submit data to be shared with Portfolio Manager.