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Introduction

This guide is intended to be a walk-through using Potomac Edison's Energy Benchmarking Tool. This tool was developed to enable building owners to request whole building aggregate data for Commercial buildings over 35,000 square feet, allowing the data to be shared directly with ENERGY STAR Portfolio Manager.

This guide provides an overview of the features and steps for building owners or their representative using this application.

The Climate Solutions Now Act of 2022

The Climate Solutions Now Act of 2022 requires the Maryland Department of the Environment (MDE) to develop Building Energy Performance Standards (BEPS). Each calendar year beginning in 2025, the owner of covered buildings 35,000 square feet or larger must benchmark the building's energy usage.

5 Tenant Rule:

If there are fewer than 5 tenants in a particular building, the building owner shall request each tenant's consent to allow Potomac Edison to provide energy data to the building owner or Portfolio Manager.

Getting Started

1. Create an account in Portfolio Manager

Portfolio Manager website: ENERGY STAR Portfolio Manager: Login

- 2. Create a property in Portfolio Manager
- 1. Click Add a property.



- 2. Enter general property characteristics.
- 3. Click on Get Started!



- 4. Enter property information.
- 5. Click Continue.



- 6. Enter values or leave blank for now (optional).
- 7. Click on Add Property.

Add Property

3. Create Meters in Portfolio Manager

Once you have created your property in Portfolio Manager, you can create a virtual meter. FirstEnergy requires you to create one virtual meter for each property. The aggregated whole building energy data will then be uploaded into the meter you created for each energy type when you submit a usage request from the FirstEnergy Benchmarking Portal.

1. Click on the Energy tab. Once you are in this tab select Add a Meter



2. Select all energy sources for your property.



Note: FirstEnergy only supports the transfer of electricity purchased from the grid at this time

3. Click on Get Started!



4. Enter fields for meters. NOTE: To set up meters, you need to enter units and the date when the meter became active. Enter values in these fields by clicking in the black space under that field heading. FirstEnergy will provide electric data in "kWh." It is important to use these measurement units when setting up your meters in Portfolio Manager.



5. Click on Create Meters.

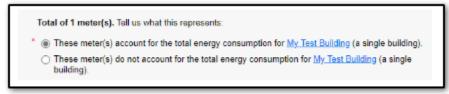


6. Skip usage entries and click on Continue.



7. Select These meter(s) account for the total energy consumption for this property.





8. Click on Apply Selections

Apply Selections

Congratulations, you've successfully set up your property and meters in Portfolio Manager. Now you're ready to connect to our benchmarking service.

4. Set up an account in the FirstEnergy Benchmarking Tool

Follow this link for the steps to Register with FirstEnergy's Benchmarking Tool

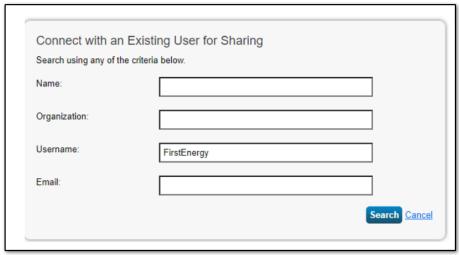
- 5. Return to Portfolio Manager, Connect your account with FirstEnergy.
- 1. In Portfolio Manager, click on Contacts.



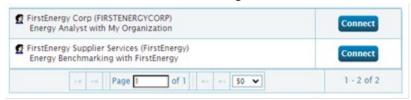
2. Click on Add New Contacts/Connections.



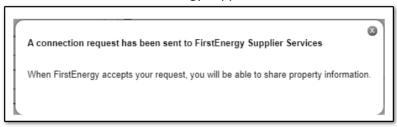
3. Under Connect with an Existing User for Sharing username, type: FirstEnergy and click on Search.



When submitting a connection request, please ensure that you are connecting with the Portfolio Manager account with username "FirstEnergy," display name "FirstEnergy Supplier Services," and role "Energy Benchmarking with FirstEnergy." Please note that any connection requests sent to the account with username "FIRSTENERGYCORP" will <u>not</u> be accepted, as this account is separate from the account set up to facilitate customer data access for benchmarking.



4. Select Connect for the FirstEnergy Supplier Services contact.



5. Request will show as pending.



- 6. The user will receive an item in their PM "Notifications" that the Connection was accepted or declined by FirstEnergy. Allow 60 minutes.
- 7. When the notification arrives, continue into your Portfolio Manager account.

6. Share your property and meters with FirstEnergy

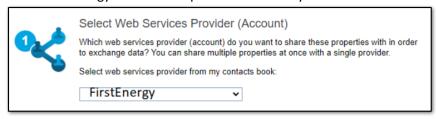
1. Click on the Sharing tab.



2. Click on Share with your Utility or Service Provider for exchanging data.



3. Select FirstEnergy from the drop-down menu for your contacts book



4. Select which Property you want to share.

Name	Property Type\$	State/Province ♦
My Test Building	Other - Utility	MD

5. Click Apply Selection.

Apply Selection

6. You must share with full access. Select your options.



7. Click Authorize Exchange.

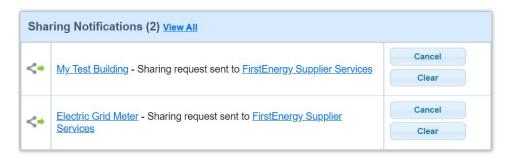


8. Congratulations!

Bulk Share Properties for Exchanging Data: Results



9. Verify Sharing Requests have been sent. Your sharing notifications will automatically appear in the Sharing Notifications section of the Sharing Tab under your Portfolio Manager account.



- 10. FirstEnergy retrieves share requests. When FirstEnergy has retrieved the share requests, they will be automatically accepted, and an item in their PM "Notifications" that the Share was accepted by FirstEnergy. Allow up to an hour for the initial share requests.
- 11. If your requests were declined for any reason, go back to Step 6, and ensure that the appropriate permission levels have been set for both the Property and Meters or that your Property ID/Meter ID that was provided in Portfolio Manager matches what is on the FirstEnergy Benchmarking site.

7. Log back into FirstEnergy's Benchmarking Tool to submit a usage request.

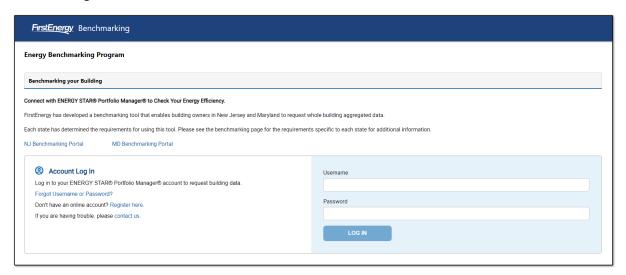
Follow this link for instruction on how to submit a Usage Request.

Registering with FirstEnergy's Benchmarking Tool

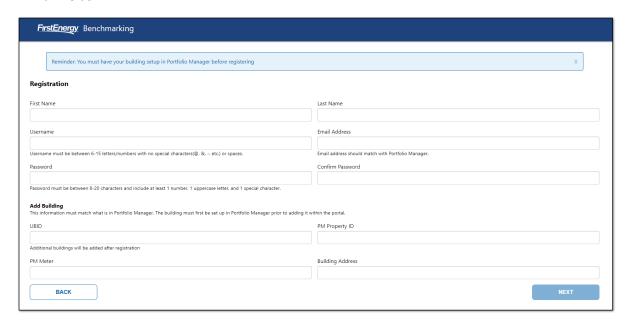
**** You must have your building set up in Portfolio Manager before Registering ****

Link directly to the page: https://energybenchmarking.firstenergycorp.com/login

- 1. Go to https://energybenchmarking.firstenergycorp.com/login
- 2. Select the Register here link.



3. Fill in all fields.

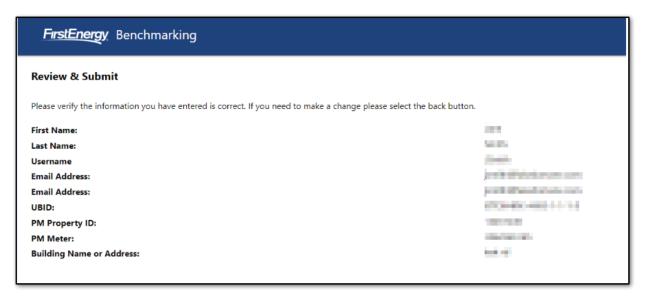


4. If the UBID (Unique Building ID) is not valid, the following message will show:

UBID Not Found

The UBID provided was not able to be found
Based on the data you entered, we did not find any matches. Please re-enter another UBID.
If you are having trouble, please contact us

- 5. Select "Next."
- 6. This is the review and submit page. Please review all information for accuracy.



7. Read the terms and conditions and check the box to acknowledge. Also, you will need to check the reCAPTCHA box before submitting.



8. You are now registered with the FirstEnergy Benchmarking Tool and are taken to the "Add Tenants" screen to complete the setup of your initial building.

Note: Even if there is only one tenant in the building, you must add that tenant to the building. (Refer to the "Add tenants" section for additional instructions)

Logging in

- 1. Go to https://energybenchmarking.firstenergycorp.com/login
- 2. You will see quick links at the bottom.
 - a. User Guide A complete guide on how to use the benchmarking tool.
 - b. Benchmarking Portal This is where you would log in
 - c. Customer Consent Form This is required if there are less than 5 tenants in the building.
 - d. Energy Star Portfolio Manager Link to Energy Star Portfolio Manager



3. Enter your Username and password and select "Login."

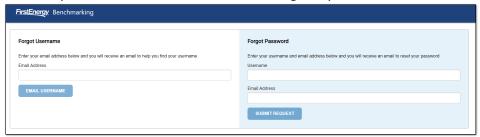


Forgot Username or Password

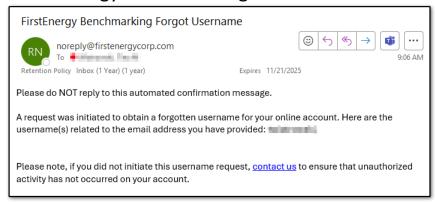
1. Select "Forgot Username or Password?



- a. Forgot Username:
 - i. Enter your email address that was used to register your account and select "Email Username."



ii. If an account was found an email will be sent with your username.

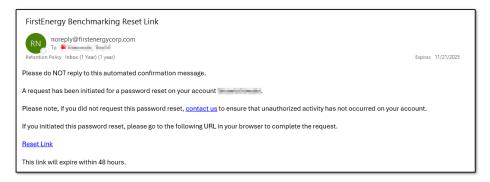


b. Forgot Password:

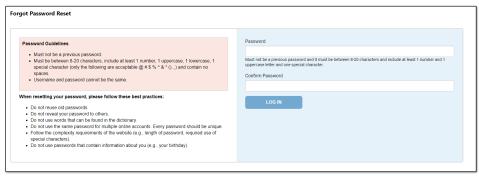
i. Enter your username and Email address and select "Submit Request"



c. If an account was found, an email will be sent to complete the password reset process.



d. Click on the Reset Link, enter a new password, and select "Log In." This will take you back to the log-in screen.



Energy Benchmarking Portal

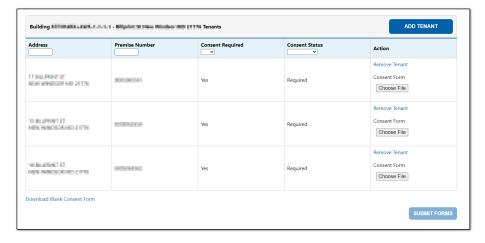
From the Portal you will be able to:

- View a list of your buildings including UBID, PM (Portfolio Manager) Property ID, PM Meter, and Building Address
- You will be able to do the following:
 - Manage your account, via Manage My Account.
 - o Reset Password
 - Manage tenants.
 - Edit the building
 - o Delete Building.
 - Usage request.
 - o Add a building.
 - o Log out.



Manage Tenants

Select Manage Tenant next to the building address you choose.



Within the Manage tenants screen, you will be able to:

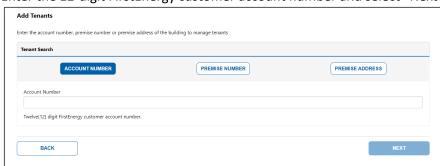
- 1. View a list of tenants in that building.
- 2. View if consent forms are needed for any tenants.
- 3. View consent status (if applicable).
- 4. Remove Tenant
- 5. Download a blank consent form.
- 6. Upload a completed consent form.
- 7. Add Tenants.

Add Tenants

When "Add Tenants" is selected, you will be presented with the option to search by Account Number, Premise Number or Premise Address.

1. Add Tenants by Account Number

a. Enter the 12-digit FirstEnergy customer account number and select "Next"



b. The results will populate. Select the address and hit "Confirm."



- c. If there are additional tenants not shown on the list, you can select "Add Additional Premise Address" and perform an additional search. This is particularly helpful if the building is on a corner or has multiple addresses associated with it. When Next is selected, you will be presented with a list of premises to choose from.
- d. Once the service addresses are selected, click confirm. If there are fewer than 4 tenants in the building, the following message will appear. This is an informational message only to advise that consent forms will be needed and to confirm the tenants added to the building.

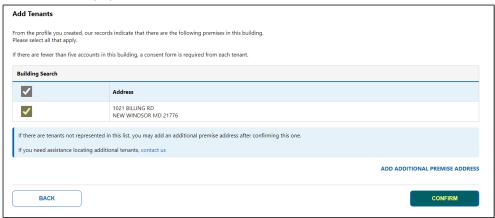


2. Add Tenant by premise number.

a. The premise number identifies the property in FirstEnergy's system. It is nine (9) digits long and is the second set of numbers in the customer number. This can be located on the customer's bill under charges from Potomac Edison.



b. The results will populate. Select the address and hit "Confirm."

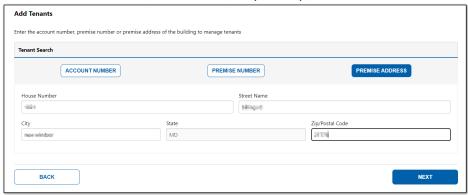


- c. If there are additional tenants not shown on the list, you can select "Add Additional Premise Address" and perform an additional search. This is particularly helpful if the building is on a corner or has multiple addresses associated with it. When Next is selected, you will be presented with a list of premises to choose from.
- d. Once the service addresses are selected, click confirm. If there are fewer than 5 tenants in the building, the following message will appear. This is an informational message only to advise that consent forms will be needed and to confirm the tenants added to the building.

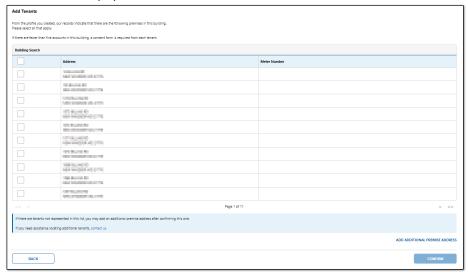


3. Add Tenant by address.

1. Fill in the House number, Street Name, City and Zip/Postal Code and select "Next."



2. The results will populate. The select all function can be used or each unit can be selected individually.



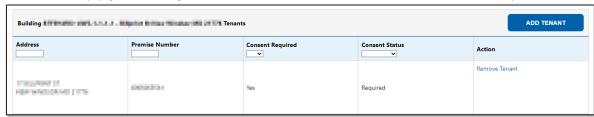
- 3. If there are additional tenants not shown on the list, you can select "Add Additional Premise Address" and perform an additional search. This is particularly helpful if the building is on a corner or has multiple addresses associated with it. When Next is selected, you will be presented with a list of premises to choose from.
- 4. Once the service addresses are selected, click confirm. If there are fewer than 5 tenants in the building, the following message will appear. This is an informational message only to advise that consent forms will be needed and to confirm the tenants added to the building.



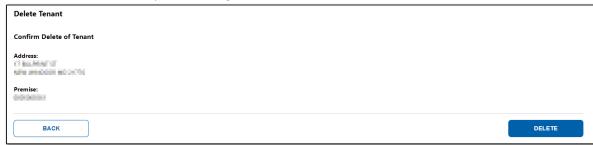
Remove Tenant

There may be times where you may need to remove a tenant that was added in error.

1. To do this simply go to Manage tenants and select "Remove Tenant" next to the one you want removed.



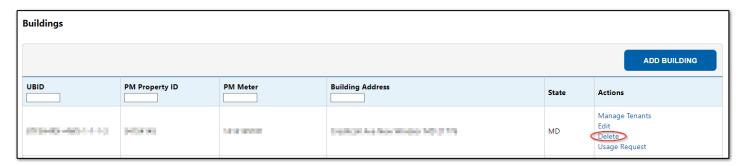
2. You will get confirmation of deleting this tenant. This is a safeguard to make sure you really want to remove this tenant from your building.



3. Select "Delete" if you are sure you want to delete the tenant or "Back" to go back to the Manage Tenants screen.

Remove Building

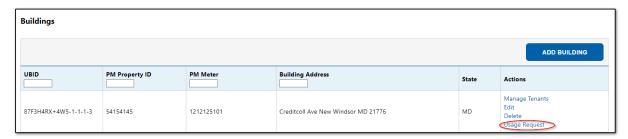
Select Remove Building" next to the building address you choose.



Removing the building would only be used if you no longer own this building. Once "Delete" is selected, a message will pop up asking you to confirm that you would like to remove this building. Once this building is removed, if it needs to be added back you would have to start with adding the building and then adding the tenants back.

Usage Requests

1. Select "Usage Requests" next to the building you would like to either request usage or check the status of the request.



2. Enter the start and end date of the usage request and select "Submit."



- 3. A reminder message will pop up. This reminder message is just letting you know that if consent forms are needed but not all are received, partial data would be sent to PM.
 - a. Select "Cancel" to cancel the request and upload any remaining consent forms.
 - b. Select "Confirm" if you wish to proceed without any outstanding consent forms.



4. A confirmation message will appear at the top of the screen that says "Thank you for your submission. We will send you an email once the data has been validated." You will see your building below now in the past usage requests with the last submission date, current submission date and status.

Thank you for your submission. We will send you an email once the data has been validated.

Add Building

1. Select "Add Building" on the Energy Benchmarking Portal



2. Enter the UBID and select "Next."



3. If the UBID is invalid, a message will be received.

The UBID provided was not able to be found based on the data you entered. Please enter another UBID.

4. Enter the PM Property ID, PM Meter ID, and Building Address, select "Next."



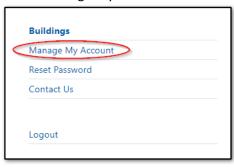
5. Review the building information and select "Submit."



- 6. A message will appear at the top that says "Successfully added building: (UBID)"
- 7. You will then need to add tenants. For additional help, review the "Add Tenant" section of this guide.

Manage My Account

1. Select Manage My Account



2. You will be able to see your First Name, Last Name, Username, and Email address. You can update these fields and select submit when finished.



3. A message will appear at the top of the screen confirming the changes were saved.

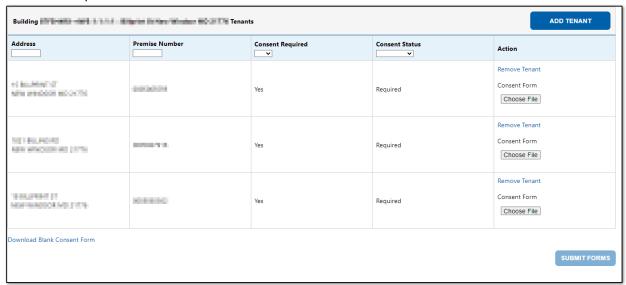


Uploading and viewing consent form status

- 1. Log in and find your building.
- 2. Select Manage Tenants



3. Your list of tenants will be shown. You can select "Choose File" to upload a consent form for a tenant with a status of "Required."



4. Once the form is uploaded the status will be changed to "Requested" while it is waiting for review by Potomac Edison.

Statuses and definitions:

Not Needed – The building has 5 or more tenants and consent forms are not needed.

Required – The building has less than 5 tenants and consent forms are required.

Requested – Consent form was uploaded and waiting Potomac Edison review.

Accepted – The consent form was accepted by Potomac Edison.

Rejected – There was an issue with the consent form, and it was rejected.

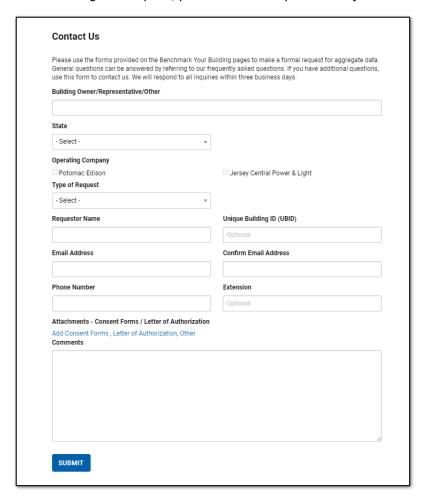
Rescinded – The tenant has rescinded their consent.

Contact Us

The contact us link can be used for the following reasons:

- Unable to add a building.
- Unable to locate and add all tenants in a building.

When sending us a request, please be sure all pertinent information is included for timely processing.



- 1. All requests will need the following information:
 - a. Building Owner/Representative/Other (Name)
 - b. State
 - c. Operating company needs to be selected.
 - d. Type of request Energy Benchmarking
 - e. Requestor Name
 - f. Email address
 - g. Confirm Email address.
 - h. Phone Number
 - i. Comments Please tell us what your inquiry is regarding. Provide as much detail as possible to ensure a timely response.

- 2. If assistance is needed adding a building, you must include the following:
 - a. UBID
 - b. PM Property ID
 - c. PM Meter ID
 - d. Building Address
 - ** You must have your building set up in Portfolio Manager before we can add it to your profile**
- 3. If assistance is needed adding tenants to your building, you must include the following:
 - a. The UBID and address of the building (that you have already added to your profile)
 - b. A complete list of all premise addresses that you need to have added to this building. If there are apartments, suites, or any other identifying information, include that as well.

Once your request is submitted you will receive a message:

Thank You

We have received your request for information. We will respond to your inquiry within 3 business days. Thank you.

A confirmation email will be received:

