

# Rhode Island Energy Benchmarking User Guide to Uploading Aggregate Usage Data

In an effort to promote energy efficiency and identify energy efficiency improvement opportunities for our customers, Rhode Island Energy 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® benchmarking tool.

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

Rhode Island Energy 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 will provide customers with a breakdown of the steps they will need to complete on the Rhode Island Energy benchmarking portal to request aggregate energy usage upload building aggregate property usage data to EPA’s Portfolio Manager account.

Visit [rienrgy.com/EPM](http://rienrgy.com/EPM)



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## ENERGY STAR EPA Portfolio Manager Site

### Step 1:

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

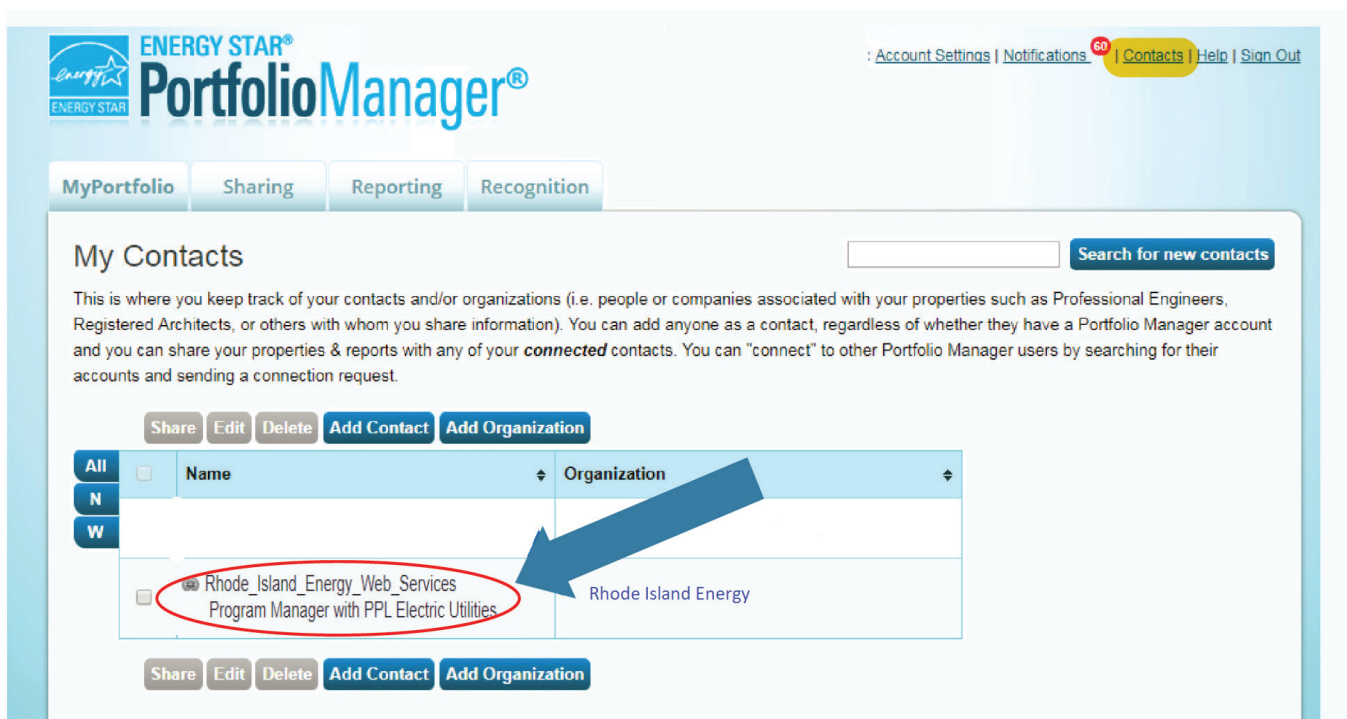
- Creates an account in the ENERGY STAR EPA Portfolio Manager site:
  - See the Appendix section for step-by-step directions how to create a Energy Star Portfolio manager account
- Submit a data sharing request in Energy Star EPA Portfolio Manager site
  - Select Rhode Island Energy Web Services

## How to connect your Portfolio Manager account to Rhode Island Energy, and share your Property with Rhode Island Energy

A. Connect with Rhode Island Energy.

1. Check if Rhode Island Energy is already a contact.

- Click on Contacts in the upper right corner of the MyPortfolio page. On the My Contacts page, check if Rhode Island Energy Web Services is listed as Connected.



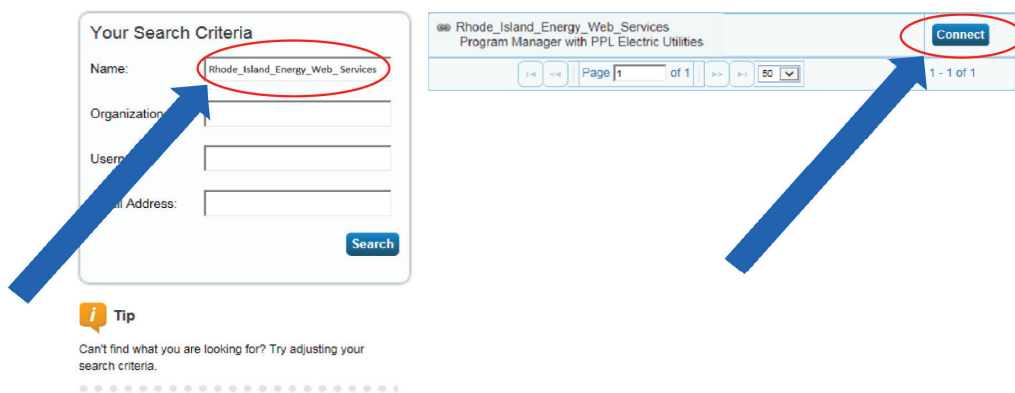
The screenshot shows the 'My Contacts' page in the ENERGY STAR Portfolio Manager interface. At the top, there are navigation links for Account Settings, Notifications, Contacts (highlighted in yellow), Help, and Sign Out. Below the navigation is a 'My Contacts' section with a search bar and a 'Search for new contacts' button. The main content area contains a table of contacts. The table has columns for 'Name' and 'Organization'. A single contact is listed: 'Rhode\_Island\_Energy\_Web\_Services Program Manager with PPL Electric Utilities' under the organization 'Rhode Island Energy'. A red circle highlights the contact name, and a blue arrow points to it from the right. Below the table are buttons for 'Share', 'Edit', 'Delete', 'Add Contact', and 'Add Organization'.

2. If Rhode Island Energy is connected, go to Step B on page 4. If not:

- Click Add Contact.
- To search for Rhode Island Energy, enter
  - Name: Rhode Island Energy Web Services
- Click Search.
- From the list, locate “Rhode Island Energy Web Services.”
- Click Connect.

### Search Results

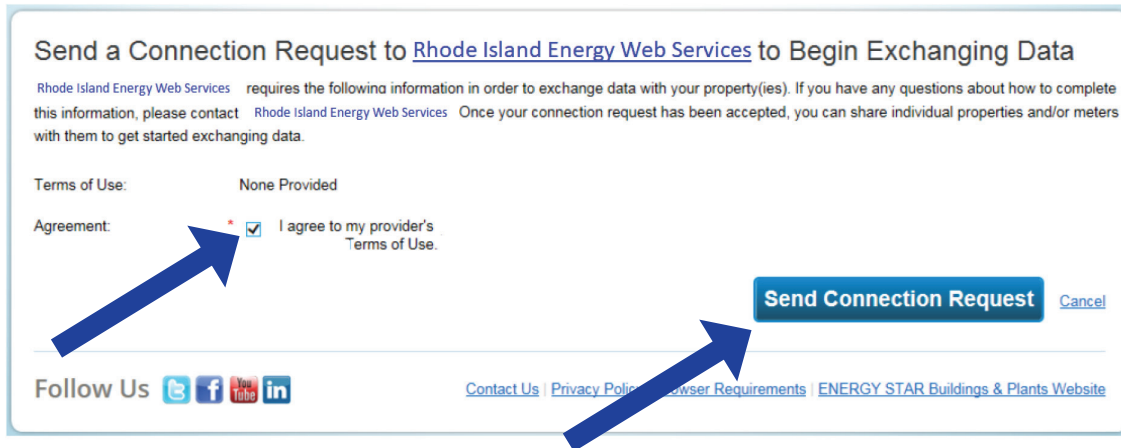
The results of your search are listed below. Clicking “Connect” will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you 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.



The screenshot shows the search results interface. On the left, the 'Your Search Criteria' form has the 'Name' field containing 'Rhode\_Island\_Energy\_Web\_Services', which is circled in red. A blue arrow points from this field to the 'Connect' button in the search results table on the right. The table header shows 'Rhode\_Island\_Energy\_Web\_Services' and 'Program Manager with PPL Electric Utilities'. The table contains one row with a 'Connect' button, also circled in red. A blue arrow points from this button to the 'Search' button in the search criteria form. Below the search criteria form is a tip: 'Tip: Can't find what you are looking for? Try adjusting your search criteria.'



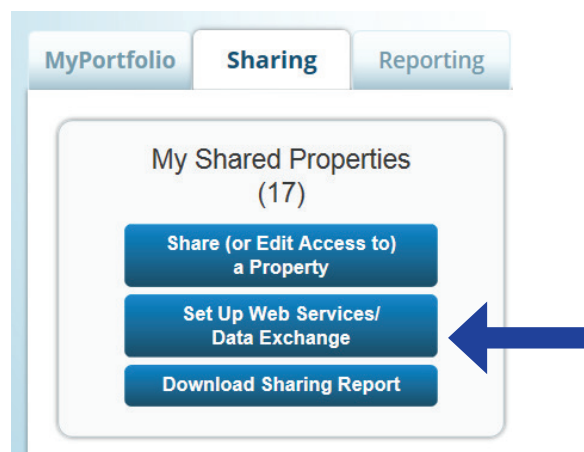
- After clicking “Connect,” you will be prompted to accept Rhode Island Energy’s Terms of Use. Check the box next to “I agree” and then click “Send Connection Request.” This will send your connection request to Rhode Island Energy. When Rhode Island Energy accepts your connection request, you will receive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



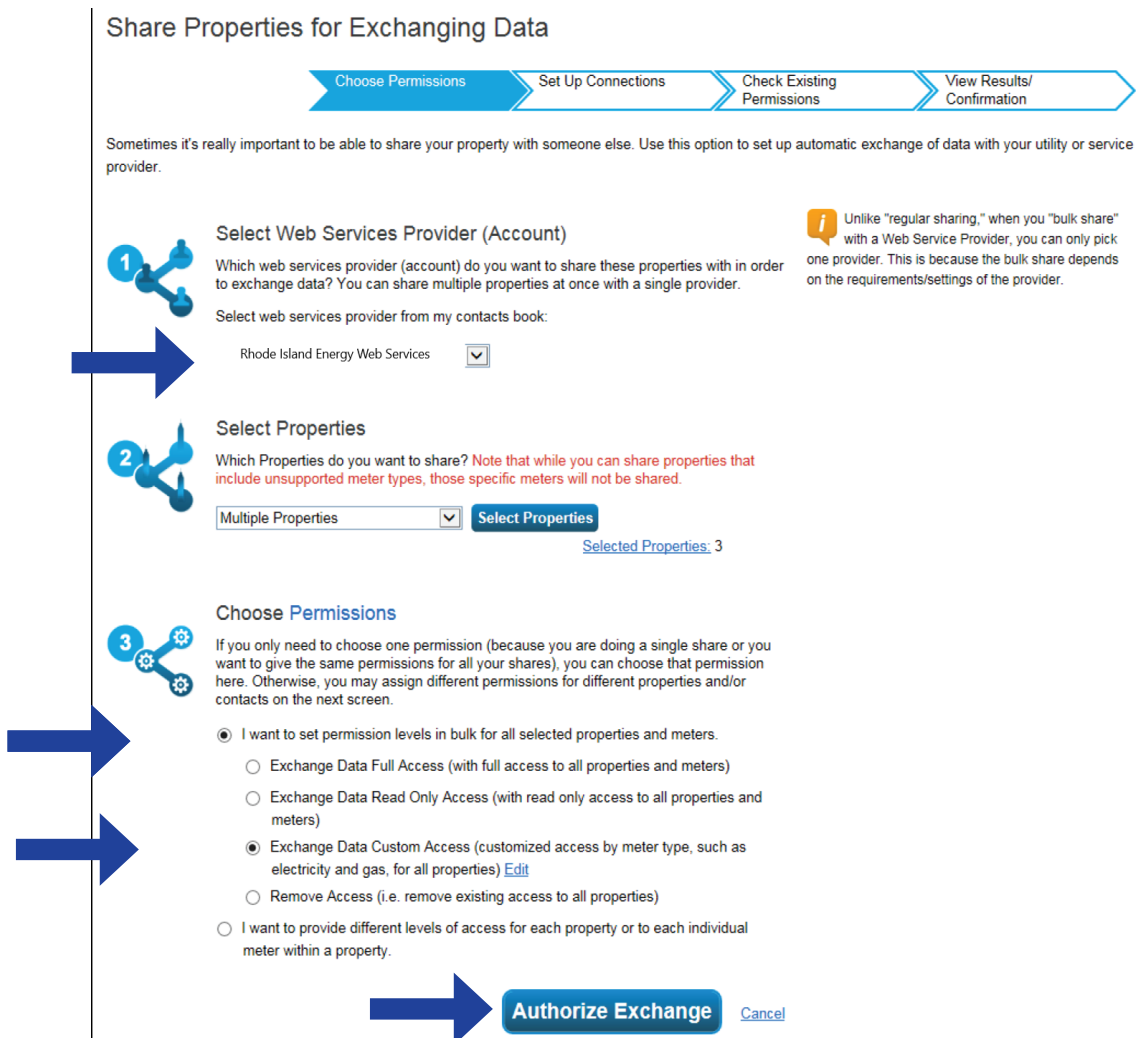
## B. Share the Property

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

1. Click on the Sharing tab.
2. Click on “Set Up Web Services/Data Exchange.”



- On the “Share Properties for Exchanging Data” page, go to “Select Web Services Provider (Account),” and choose “Rhode Island Energy 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 really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

**1 Select Web Services Provider (Account)**  
Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.  
Select web services provider from my contacts book:  
Rhode Island Energy Web Services

**2 Select Properties**  
Which Properties do you want to share? *Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.*  
Multiple Properties **Select Properties**  
Selected Properties: 3

**3 Choose Permissions**  
If you only need to choose one permission (because you are doing a single share or you want to give 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.

- I want to set permission levels in bulk for all selected properties and meters.
  - 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) [Edit](#)
  - Remove Access (i.e. remove existing access to all properties)
- I want to provide different levels of access for each property or to each individual meter within a property.

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

- 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 Rhode Island Energy.
  - If you need Rhode Island Energy 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 Rhode Island Energy 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.

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 will launch a new window, where you can set the Access Permissions that will apply to all properties that you are sharing with Rhode Island Energy.

### Select Custom Access Permissions for [redacted]

Select the permission level below that you would like to grant [redacted] for each category.

Item	None	Exchange Data Read Only	Exchange Data Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ All Meter Information			
▼ Energy Meters			
Electric - Grid	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Natural Gas	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fuel Oil (No. 2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▼ Water Meters			

Additional Options:

Item	Yes	No
* Share Forward Allow [redacted] to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input checked="" type="radio"/>	<input type="radio"/>

**Rhode Island Energy requires “Exchange Data Full Access” in order to provide aggregate energy usage data.**

**You do not need to share access to specific energy meters with Rhode Island Energy, only share access on the property level.**

**Apply Selection** [Cancel](#)

Make the following selections:

- o Property Information: select “Exchange Data Full Access.”
- o Meter Information:
  - For each meter displayed, choose “None” – even if existing Rhode Island Energy meters are listed.
    - **You do not need to share access to specific energy meters with Rhode Island Energy.** After you have successfully shared your property, Rhode Island Energy 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 Rhode Island Energy, and may even be rejected, since meter-level shared access is not needed by Rhode Island Energy’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 Rhode Island  
Energy up to 24 hours to  
validate and accept the  
initial share request.**

## Bulk Share Properties for Exchanging Data: Results



✓ **Congratulations! You have successfully shared/edited access to your property(ies).**

A total of 3 share requests were sent.

If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

Close

## Resharing EPM Property Share (Returning Customers)

1. If you have received the most recent years' data upload from Rhode Island Energy, you should not unshare your property or meter(s) with Rhode Island Energy. Leave these shares in place and the next data upload should be pushed through automatically.
2. If you do mistakenly deactivate your Rhode Island Energy's shared access to the property, that will also disable Rhode Island Energy 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 reshared your property you will need to contact Rhode Island Energy Benchmarking Portal Call Center at the email or phone number below to validate that the reshare has been accepted before filling out a New Rhode Island Energy webform **[rienergy.com/EPM](https://rienergy.com/EPM)** to restart usage data upload process again

**Email Rhode Island Energy if you have any questions or issues with your submissions:**

RI Customers – **[RI.EPM@rienergy.com](mailto:RI.EPM@rienergy.com)**

Or call **833-986-1444**, 8:00 am to 5:00 pm EST Monday through Friday



## How to Register on the Rhode Island Energy Web Site

Once you have completed your share request process in EPM ENERGY STAR Portfolio Manager, visit the Rhode Island Energy 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 Rhode Island Energy.*

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.

### RI Customers

Rhode Island Energy has a two-tier process.

- **Tier One** - Properties with THREE (3) or less 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 less 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 haven't 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 **RI.EPM@rienergy.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 Rhode Island Energy.

NOTE: Municipalities or governmental agencies that have 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 Rhode Island Energy account information. Only one (1) account number per building is required.

**Email Rhode Island Energy if you have any questions or issues with your submissions:**

RI Customers – **RI.EPM@rienergy.com**

Or call **833-986-1444**, 8:00 am to 5:00 pm EST Monday through Friday

## 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 haven't 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 Rhode Island Energy.

### Important Information

Rhode Island Energy 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 Rhode Island Energy if you have any questions or issues with your submissions:**

RI Customers – [RI.EPM@rienergy.com](mailto:RI.EPM@rienergy.com)

Or call **833-986-1444**, 8:00 am to 5:00 pm EST Monday through Friday

## Rhode Island Energy EPA Portfolio Manager Online Form

Complete the Rhode Island Energy online EPA Portfolio Manager Web Form, enter your portfolio manager property ID, Username, your email address, your contact information, service address and other required information.

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# EPA Portfolio Manager - Rhode Island

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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 otherwise indicated.

### Your Information

**\* Note:** You are currently on our **Rhode Island** site. If you are not requesting data for a building in this region, please re-select **your location**.

**Portfolio Manager Username**  ?

**E-mail address**

**Verify E-mail address**

**Phone Number**

**Request submitted by**  ▼

**First Name**  **Last Name**

**Address**

**Address 2 (Optional)**

**City**

**State**  ▼

**Zip Code**

**All fields must be completed.**

**Note: The Rhode Island Energy service address you enter on webform must be the same as what you entered on EPA Portfolio Manager account.**

2A. Enter the property service address as found on your Rhode Island Energy utility bill.

### Service Address

(Service address you enter in portfolio manager must be the same as on your Rhode Island Energy bill)

Portfolio Manager Property ID Number

Account Holder's Or Property Owner Name

House Number

Street

City

State

Zip Code

Where do I find this?

House Suffix (Optional)

Properties with a suffix (e.g., 121A) in the house number need to be entered with the suffix in the "House Suffix" field (selected from the drop-down menu); the house number only is added in the "House Number" field.

Example: 121A: House Number Field = 121 and House Suffix Field = A. If a customer enters 121A into the "House Number Field," they will receive an address error.

RI customers are required to select a commodity type (Gas, Electric or both). Note: The "Service Type" drop-down menu option will vary by state.

### Account Number

[Where do I find this?](#)

(10 digit account number without dashes)

\* **Note:** You are currently on our **Rhode Island** site. If you are not requesting data for a building in this region, please re-select **your location**.

Service Type

Account Number

Account number must be the same as it appears on your bill.

**Click the checkbox below if you're human (anti-spam verification)**


I'm not a robot



reCAPTCHA  
Privacy · Terms

Click the checkbox below if you're human (anti-spam verification)

I'm not a robot



reCAPTCHA  
Privacy · Terms

Click the "I'm not a robot" box.

**Terms and conditions**

By checking the box and entering your full name in the Electronic Signature text box, you acknowledge that you have read, understand and agree to the [terms and conditions](#).

**Electronic Signature**  
(Enter Your Full Name)

NOTE: If you have any questions or issues with your web submissions contact The Energy Efficiency team.  
• Rhode Island

Click the blue text to read the "Terms and Conditions," and then click the box to confirm that you have read them.

Submit

**Account Number**

(10 digit account number with a dash)

\* Note: You are currently on the RI Energy website. If you are in another region, please re-select your region.

**Service Type**

**Click the checkbox**

I'm not a robot

**Terms and conditions**

By checking the box and entering your full name in the Electronic Signature text box, you acknowledge that you have read, understand and agree to the [terms and conditions](#).

**Electronic Signature**  
(Enter Your Full Name)

NOTE: If you have any questions or issues with your web submissions contact The Energy Efficiency team.  
• Rhode Island  
• All other customers use energy.com

**Disclaimer**

Welcome to the Rhode Island Energy EPA Portfolio Manager Website (the "Website"). This Website is operated by Rhode Island Energy a PPL 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 RI Energy Privacy Policy and agree to be legally bound by this Agreement and RI Energy Privacy Policy. If you do not agree to the terms contained herein or in RI Energy'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 (such 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 of the RI Energy (or its affiliate) account that contains the Data (such account holder or its duly authorized representative, the "Customer"), or
  - (d) a representative of the Customer, 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 also referred to as "you or "your"; RI Energy 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 Web Consent Form) or pursuant to this Agreement is true, accurate, complete and correct.
- Request that RI Energy automatically generate and upload Data for your Building(s) to the EPA Portfolio Manager and you authorize RI Energy to release Data on your Building(s) to the appropriate governmental or regulatory agencies.
- Agree that RI Energy may provide Data to the EPA Portfolio Manager and understand that RI Energy will transmit electronically up to 12 months of the most recent Data to the EPA Portfolio Manager database in aggregate form.
- Agree that, if the Owner, you have, prior contacting RI Energy for the disclosure of the Data to the EPA, the Owner has obtained all required tenant consents for such disclosure and use of such tenant's Data for the EPA Portfolio Manager.

OK



**Terms and conditions**

By checking the box and entering your full name in the Electronic Signature text box, you acknowledge that you have read, understand and agree to the [terms and conditions](#).

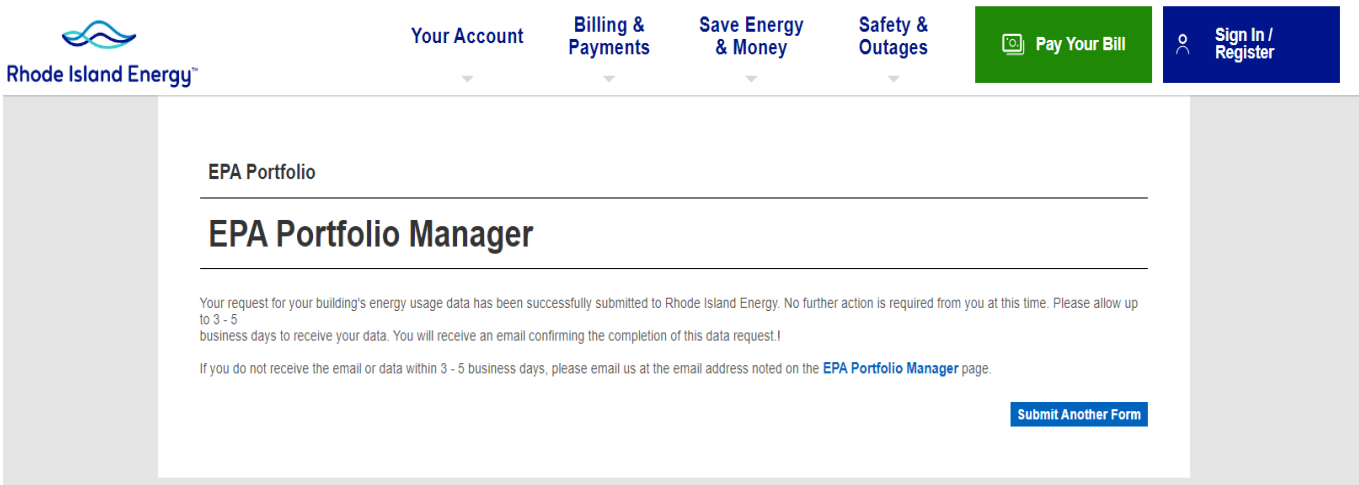
Electronic Signature  
(Enter Your Full Name)

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

## Rhode Island Energy Web Submission Messages

After submitting the Rhode Island Energy webform, the following message will be displayed:

**Successful Request Submission**



The screenshot shows the Rhode Island Energy website navigation bar with links for "Your Account", "Billing & Payments", "Save Energy & Money", "Safety & Outages", "Pay Your Bill", and "Sign In / Register". The main content area displays the "EPA Portfolio Manager" header and a message: "Your request for your building's energy usage data has been successfully submitted to Rhode Island Energy. No further action is required from you at this time. Please allow up to 3 - 5 business days to receive your data. You will receive an email confirming the completion of this data request! If you do not receive the email or data within 3 - 5 business days, please email us at the email address noted on the EPA Portfolio Manager page." A "Submit Another Form" button is located at the bottom right of the message area.

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

**Email Rhode Island Energy if you have any questions or issues with your submissions:**

RI Customers – [RI.EPM@rienergy.com](mailto:RI.EPM@rienergy.com)

Or call **833-986-1444**, 8:00 am to 5:00 pm EST Monday through Friday

## Webform Submission Errors Messages

### **Property Share Access Level Validation Issues**

EPA Portfolio Manager

You recently submitted a data request to obtain your building' gas and/or electric usage data from Rhode Island Energy. We were unable to verify that you have shared your property with us in ENERGY STAR® Portfolio Manager®. Please complete the property share request and grant Rhode Island Energy "edit" access so that we can upload your building's gas and/or electric usage data.

### **Account validation issue**

EPA Portfolio Manager

Account not found. Please enter a valid account number

### **Service Address validation issue**

EPA Portfolio Manager

Service address not found. Please enter a valid service address

### **Successful Submission but Consent Form Required**

EPA Portfolio Manager

We have received your request and have validated it against our systems. In order to complete your data load request, your must provide us with a consent form.

Please download and return the Consent form or contract our EPM Energy Efficiency Team.

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

## Additional Historical Usage Data Upload Option

Rhode Island Energy 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.

The following will provide you step by step direction to request for additional usage data:



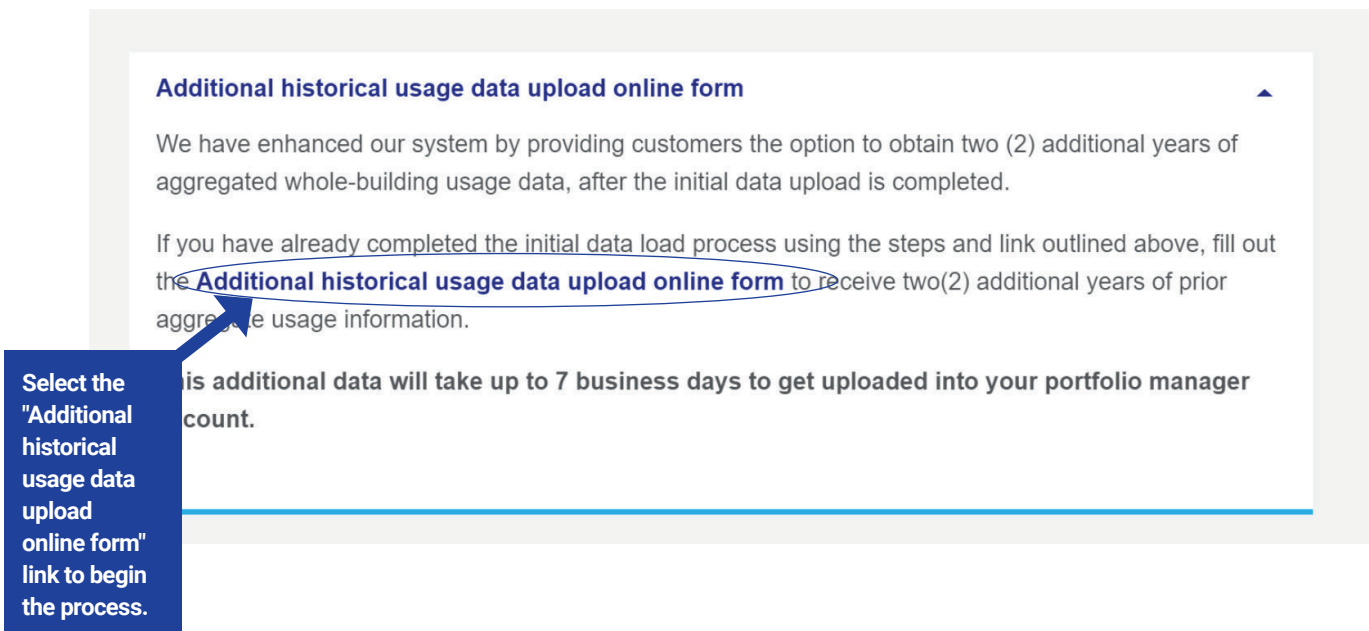
**Step 1:** Start the aggregate data upload process, you must visit the **EPA Portfolio Manager site** to register your property and complete the SHARE PROPERTY procedure. (If you haven't done so already.)

**Step 2:** Once you have completed the property share procedure with the EPA portfolio manager, select **EPA Portfolio Manager Online Form** link to complete the online register process with Rhode Island Energy

Additional historical usage data upload online form

Select the "Additional historical usage data upload online form" link.

After selecting the link the following information will be displayed.



**Additional historical usage data upload online form**

We have enhanced our system by providing customers the option to obtain two (2) additional years of aggregated whole-building usage data, after the initial data upload is completed.

If you have already completed the initial data load process using the steps and link outlined above, fill out the **Additional historical usage data upload online form** to receive two(2) additional years of prior aggregate usage information.

This additional data will take up to 7 business days to get uploaded into your portfolio manager account.

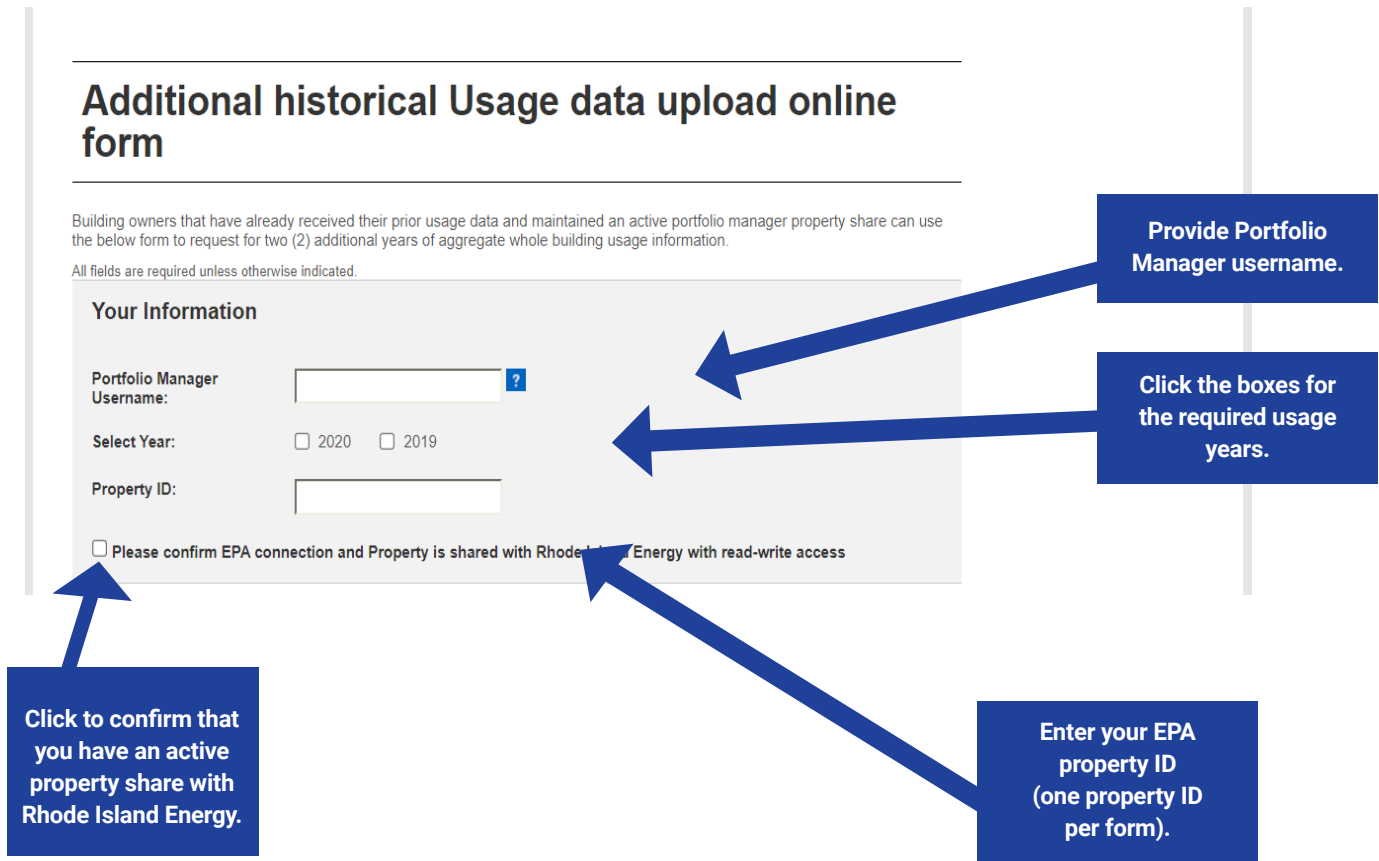
Select the "Additional historical usage data upload online form" link to begin the process.

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 Rhode Island Energy 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 Portfolio Manager username.
- Select the years that you want additional aggregated usage information.
- Enter your EPA property ID that you want additional aggregated usage information.
  - Note: This webform is for individual property usage requests only.
- Click that you have confirmed that you have an active EPA property share with Rhode Island Energy.



**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.

All fields are required unless otherwise indicated.

**Your Information**

Portfolio Manager Username:

Select Year:  2020  2019

Property ID:

Please confirm EPA connection and Property is shared with Rhode Island Energy with read-write access

**Provide Portfolio Manager username.**

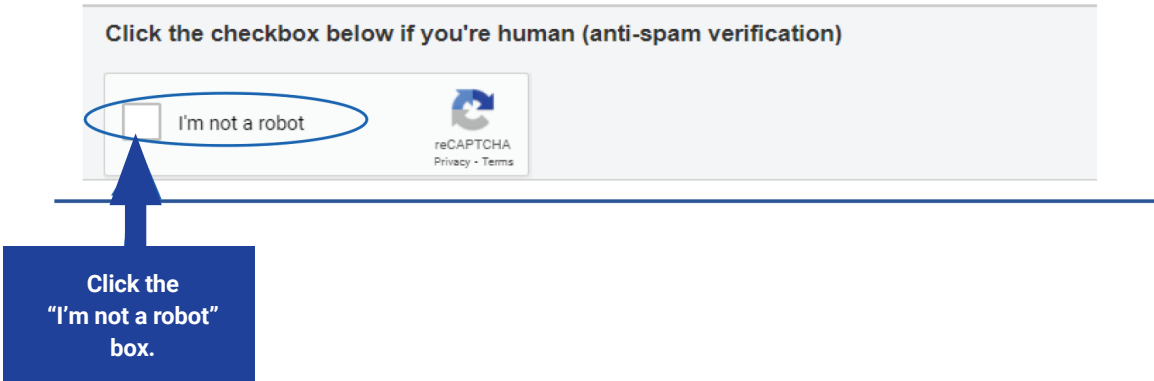
**Click the boxes for the required usage years.**

**Enter your EPA property ID (one property ID per form).**

**Click to confirm that you have an active property share with Rhode Island Energy.**

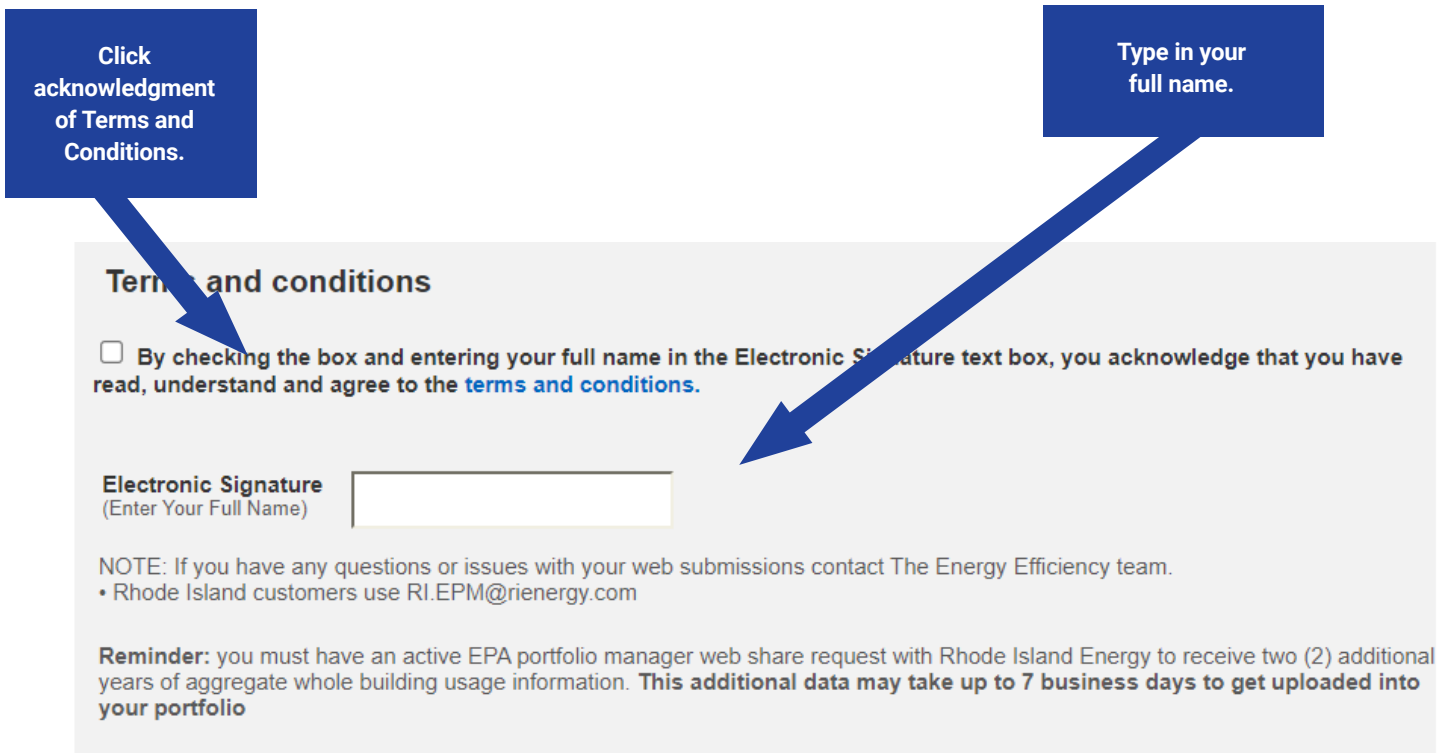
**Step 2:**

- 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.





# Rhode Island Energy Benchmarking Portal

## Frequently Asked Questions

### 1 What type of data does Rhode Island Energy upload into EPM?

Rhode Island Energy provides customers with annual aggregated usage information. Starting June 2019, we will be uploading two files into EPM portfolio site that includes:

#### Gas

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

#### Electric

- Aggregate electric usage data

### 2 How long does it take Rhode Island Energy to accept the ENERGY STAR EPA PORTFOLIO MANAGER share requests?

**First-Time Share Request:** Rhode Island Energy can take up to 24 hours to validate and accept an initial share request.

**Resharing Data Request:** Resharing request are automatically accepted.

### 3 Will Energy Star EPA Portfolio Manager send an email to confirm that the share request was accepted?

Energy Star EPA Portfolio Manager does not have email notification process to notify customers that their share request is accepted.

### 4 How long does a customer need to wait after submitting a share request to submit a Rhode Island Energy benchmarking webform?

**First-Time Share Request:** Customer should wait 24 hours before submitting a webform

**Resharing Data Request:** After you have reshared your property you will need to contact the Rhode Island Energy Benchmarking Portal Call Center at the below email or phone number to validate that the reshare has been accepted before filling out a new Rhode Island Energy webform to restart usage data upload process again.

**Rhode Island Energy Benchmarking Portal Call Center:**  
RI Customers – [RI.EPM@rienergy.com](mailto:RI.EPM@rienergy.com) Or call  
**833-986-1444**, 8:00 am to 5:00 pm  
EST Monday through Friday

### 5 Does Rhode Island Energy use tax lot – Block and Lot number (BBL)?

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

### 6 How many months of data will Rhode Island Energy be providing?

Rhode Island Energy will be providing 12 calendar months of aggregate usage information per service address.

Please note: We do not provide block and lot property usage information.

### 7 Does Rhode Island Energy provide an option for customers to receive additional usage information through the benchmarking web portal?

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

### 8 How long does it take for the customer to get their aggregate usage information uploaded?

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

### 9 Does Rhode Island Energy provide quarterly or monthly usage data updates?

Yes, as part of our system enhancements we will be providing our customers with quarterly data updates, if the Portfolio Manager connection request is active.

continued>

**10 How long will the quarterly uploads last?**

Quarterly updates will continue for up to 4 years as long as building owners maintain their EPA Portfolio Manager web share link as active. Deactivating EPA portfolio manager property share link will disable the upload process.

**11 Is there a cost associated when using the new Rhode Island Energy Data Upload process?**

This is a free service that is offered to Rhode Island Energy customers.

**12 Is the usage information provided based on a per meter basis or per building?**

The usage information that Rhode Island Energy provides is aggregate whole building usage information.

**13 Who are required to submit Energy Usage Release Forms?**

**RI region:**

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

Email the Energy Usage Release Form to:  
RI Customers – **RI.EPM@rienergy.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.

**14 What happens if you mistakenly unshare your EPM property share with Rhode Island Energy?**

If you mistakenly remove Rhode Island Energy's shared access to the property, it will break Rhode Island Energy 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 again.

After you have reshared your property you will need to contact the Rhode Island Energy Benchmarking Portal Call Center at the following email or phone number to validate that the reshare has been accepted before filling out a new Rhode Island Energy webform at **rienergy.com/EPM** to restart the usage data upload process again.

**Rhode Island Energy Benchmarking Portal Call Center:**

RI Customers – **RI.EPM@rienergy.com** Or call **833-986-1444**, 8:00 am to 5:00 pm EST Monday through Friday

**15 Will I need to submit a new Rhode Island Energy webform to restart usage data uploads after I reshare my EPM property share access?**

Yes, after you reshare your EPM property share access, you will need to fill out a new Rhode Island Energy webform before the data upload process can resume.

**Email Rhode Island Energy if you have any questions or issues with your submissions:**

RI Customers – **RI.EPM@rienergy.com**

Or call **833-986-1444**, 8:00 am to 5:00 pm EST Monday through Friday

## Appendix

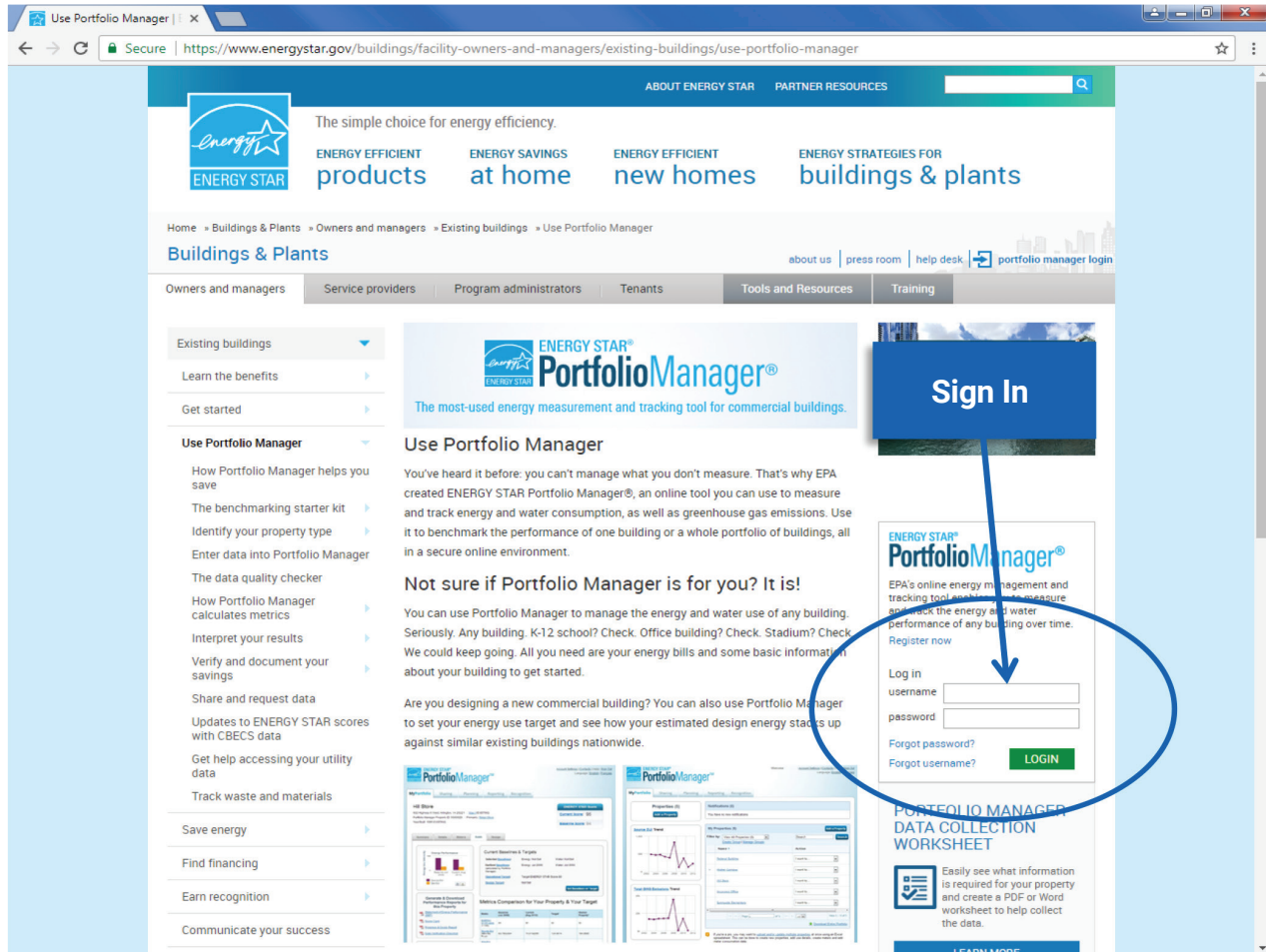
### How to create an account in ENERGY STAR Portfolio Manager Site?

#### STEP 1: How to register a 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 a Portfolio Manager account, enter your username and password.  
If you do not have an account, click on 'Register now'.



The screenshot shows the ENERGY STAR Portfolio Manager website. The main navigation bar includes 'ABOUT ENERGY STAR' and 'PARTNER RESOURCES'. The header features the ENERGY STAR logo and the tagline 'The simple choice for energy efficiency.' Below this, there are four main categories: 'ENERGY EFFICIENT products', 'ENERGY SAVINGS at home', 'ENERGY EFFICIENT new homes', and 'ENERGY STRATEGIES FOR buildings & plants'. The breadcrumb trail indicates the current location: 'Home > Buildings & Plants > Owners and managers > Existing buildings > Use Portfolio Manager'. The page title is 'Buildings & Plants'. The main content area is titled 'Use Portfolio Manager' and includes a 'Sign In' button. Below the 'Sign In' button, there is a login form with fields for 'Log in username', 'password', and 'Forgot password?'. A 'LOGIN' button is located below the password field. A blue circle highlights the 'Register now' link in the text above the login form. The page also features a sidebar with various links and a 'PORTFOLIO MANAGER DATA COLLECTION WORKSHEET' section at the bottom right.

- 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.



ENERGY STAR®  
PortfolioManager®

Help  
Language: [English](#) | [Français](#)

Welcome to Portfolio Manager  
Helping you track and improve energy efficiency across your entire portfolio of properties.

The username and/or password you entered is not correct. Please try again.

Username: \*

Password: \*

[I forgot my password.](#)  
[I forgot my username.](#) **Sign In**

[Click here to create a new account](#) **Create a New Account**

**ENERGY STAR Buildings Homepage**

**Take a Training**

**Learn More About Portfolio Manager**

These links provide more information from ENERGY STAR and are not available in French.

You are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and subject to criminal and civil penalties. Use of the system indicates consent to monitoring and recording.

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



## Create an Account

Already have an account? [Sign In Here](#)

### 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: \*

### Getting Started

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.



### 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: \*

City/Municipality: \*

State/Province: \*

Postal Code: \*

### Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division





### About Your Organization

Organization Name: \*

Primary Business or Service of Your Organization: \*


Is your organization an ENERGY STAR Partner?  Yes  No

### Searchability in Portfolio Manager

Can other people search for you and send you a connection request?  Yes  No

### Confirm Your Identity

Please confirm that you are a human

I'm not a robot
 

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

**Primary Business or Service**

If you have more than one "primary business," just pick the best option. Portfolio Manager will determine your category for a score based on the information, like square footage, that you enter for each of your property uses.

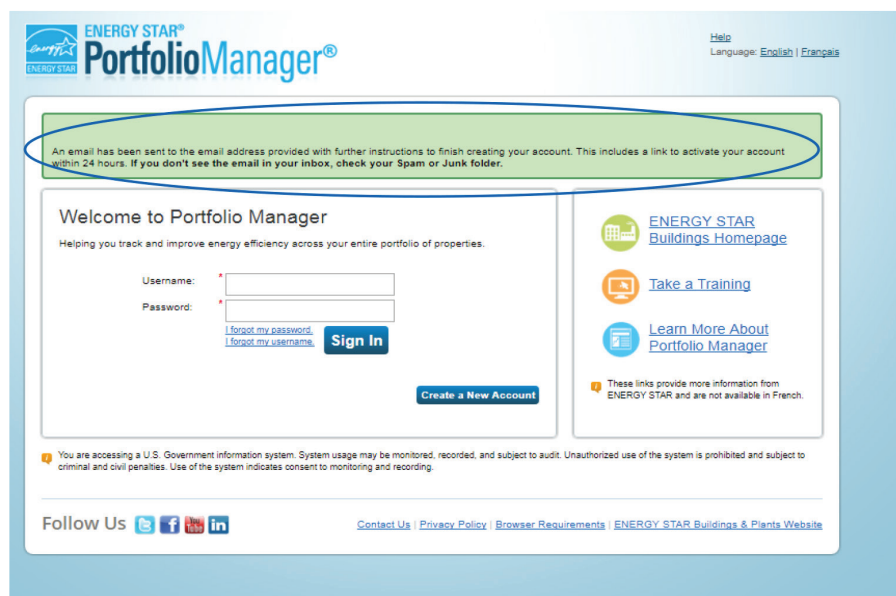
.....

**Connecting with Others in Portfolio Manager**

You can [connect with other people](#) in Portfolio Manager to easily share information. Your account must be searchable in order for others to send you a connection request.

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

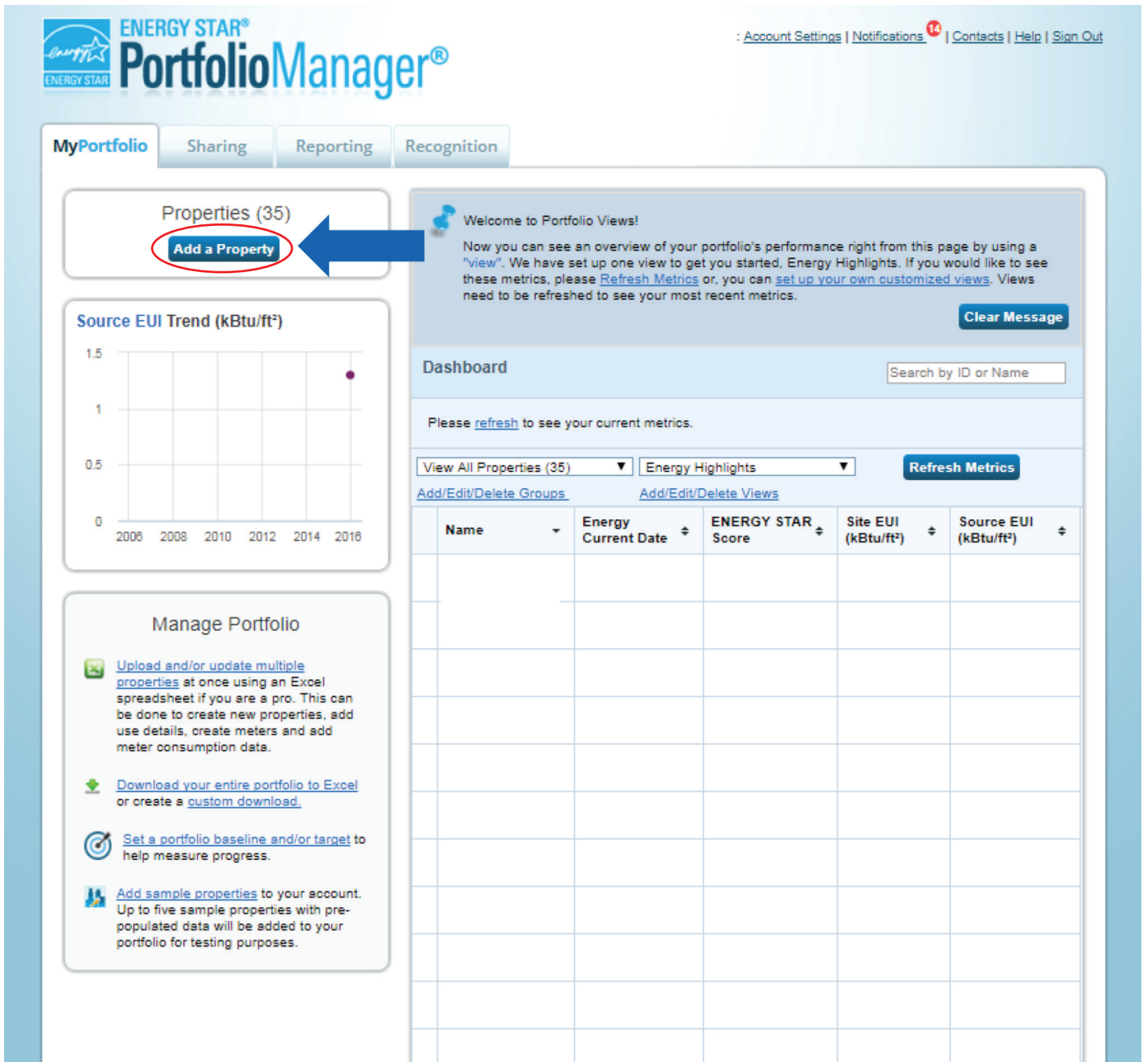
*'An email has been sent to the email address provided with further instructions to finish creating your account.'*



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

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

- A. Select “Add a Property.”



The screenshot shows the Energy Star Portfolio Manager interface. At the top left, there is the Energy Star logo and the text 'ENERGY STAR Portfolio Manager'. On the right, there are navigation links: Account Settings, Notifications (with a red '14' badge), Contacts, Help, and Sign Out. Below the header, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. On the left side, there is a 'Properties (35)' section with an 'Add a Property' button circled in red and a blue arrow pointing to it. Below this is a 'Source EUI Trend (kBtu/ft²)' chart showing a single data point for 2016. Further down is a 'Manage Portfolio' section with four options: 'Upload and/or update multiple properties', 'Download your entire portfolio to Excel or create a custom download', 'Set a portfolio baseline and/or target', and 'Add sample properties'. The main content area on the right features a 'Welcome to Portfolio Views!' message, a 'Dashboard' section with a search box, and a table of properties. The table has columns for Name, Energy Current Date, ENERGY STAR Score, Site EUI (kBtu/ft²), and Source EUI (kBtu/ft²). The table is currently empty.

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



**ENERGY STAR® PortfolioManager®**

Account Settings | Notifications <sup>14</sup> | Contacts | Help | Sign Out

### Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!

**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.](#)

**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?

**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.

**Get Started!**

**Tip**  
To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

**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.

**Test Properties**  
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 [Account Settings](#).

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C. Enter your property service address as found on your Rhode Island Energy bill, Year Built, Gross Floor Area and Occupancy percentage, then click “Continue.”

### Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

#### About Your Property

Name:

Country:

Street Address:

City/Municipality:

County:

State/Province:

Postal Code:

Year Built:

Gross Floor Area:    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:    Default Value

Occupancy:  %

Property Photo (optional):  No file chosen  
Select an image file on your computer with the format type of .jpg, .jpeg, .png or .gif; photos will be resized to fit a space of 2.78 inches wide x 2 inches tall.

**Tip**

The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

**Please Note: Street address must match the service address found on your Rhode Island Energy bill.**

**Tip**

The property photo that you upload here can be used on the [Registry of ENERGY STAR Qualified Buildings](#) if you submit the photo with your application for ENERGY STAR certification. Once a photo has been approved with an application, it cannot be changed until the next time that the property receives ENERGY STAR certification.

#### 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(s):

#### Do any of these apply?

My property's energy consumption includes [parking areas](#)

My property has a [heated swimming pool](#)

My property has one or more retail stores [\(that are eligible for a Retail score\)](#)


My property has one or more restaurants/cafeterias

My property has nursing/assisted care units

**Tip**

Answering these simple questions will help us guide you in entering your property correctly.

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


Account Settings | Notifications <sup>1</sup> | Contacts | Help | Sign Out

### Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

**Basic Information**

Name:	Test Customer	Country:	US
Property Type:	Multifamily Housing	Address:	<a href="#">Map It</a>
Year Built:	2008		
Property consists of:	0 building		<a href="#">Edit</a>

**Building Use** [Edit Name](#)

Multifamily Housing refers to residential properties that contain two or more residential living units. These properties may include low-rise buildings (1-4 stories), mid-rise buildings (5-9 stories), or high-rise buildings (10+ stories). Occupants of these buildings may include tenants, cooperators, and/or individual owners.

Eligibility for an ENERGY STAR score and certification for Multifamily properties:

- 2 units or more per building
- 20 units or more per property/campus
- Greater than 75% occupancy
- Communities of single-family homes are not eligible. If your property is a mix of multifamily and single-family homes, the property would still be eligible as long as the single-family homes are less than 25% of the total GFA.

Gross Floor Area (GFA) should include all buildings that are part of the multifamily property, including any separate management offices or other buildings that may not contain living units. Gross Floor Area should include all fully-enclosed space within the outside surfaces of the exterior walls of the building(s) including living space in each unit (including occupied and unoccupied units), interior common areas (e.g. lobbies, offices, community rooms, common kitchens, fitness rooms, indoor pools), hallways, stairwells, elevator shafts, connecting corridors between buildings, storage areas, and mechanical space such as a boiler room. Open air stairwells, breezeways, and other similar areas that are not fully-enclosed should not be included in the GFA.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	<input type="text" value="70,000"/> <input type="button" value="Sq. Ft."/> ▼	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
★ Total Number of Residential Living Units	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Low-rise Setting (1-4 stories)	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Mid-rise Setting (5-9 stories)	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a High-rise Setting (10 or more stories)	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
★ Number of Bedrooms	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
Resident Population Type	<input type="text"/>	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
Government Subsidized Housing	<input type="text"/>	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
Number of Laundry Hookups in All Units	<input type="text"/>	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
Number of Laundry Hookups in Common Area(s)	<input type="text"/>	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/>	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>
Percent That Can Be Cooled	<input type="text"/>	1/1/2008 <input type="button" value="Info"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score and Water Score.

[Cancel](#)

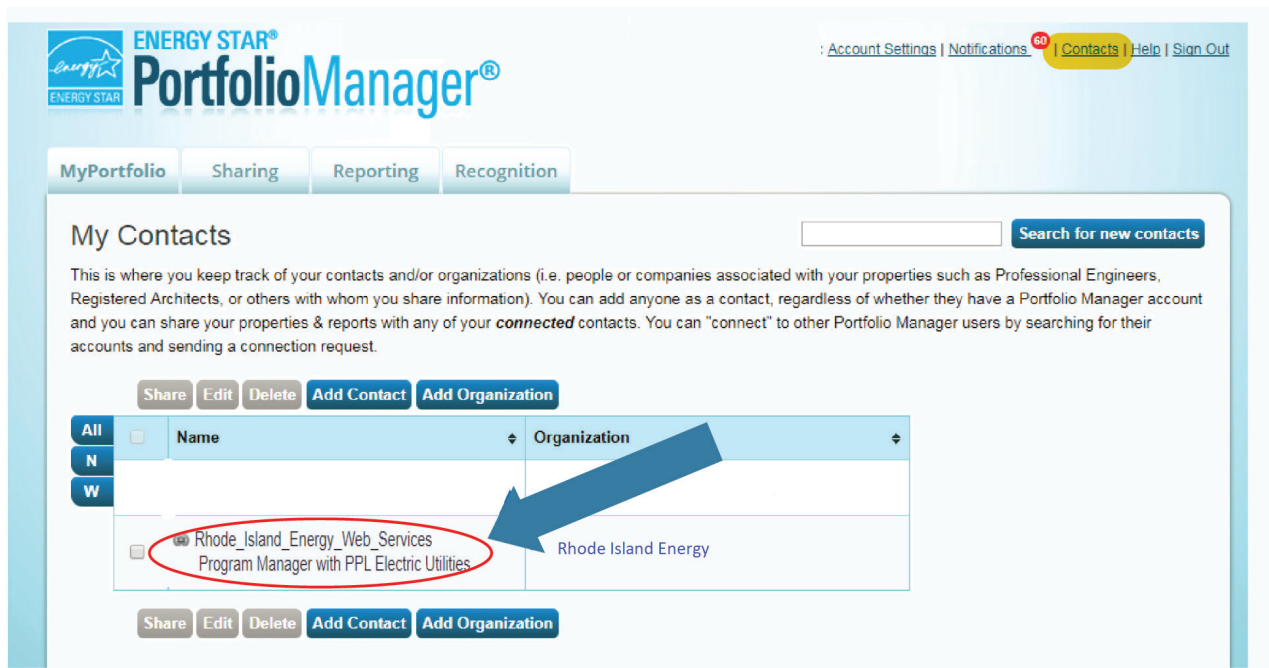
### STEP 3: How to connect your Portfolio Manager account to Rhode Island Energy, and share your Property with Rhode Island Energy

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.
  - Select Rhode Island Energy Web Service

#### Connect with Rhode Island Energy:

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

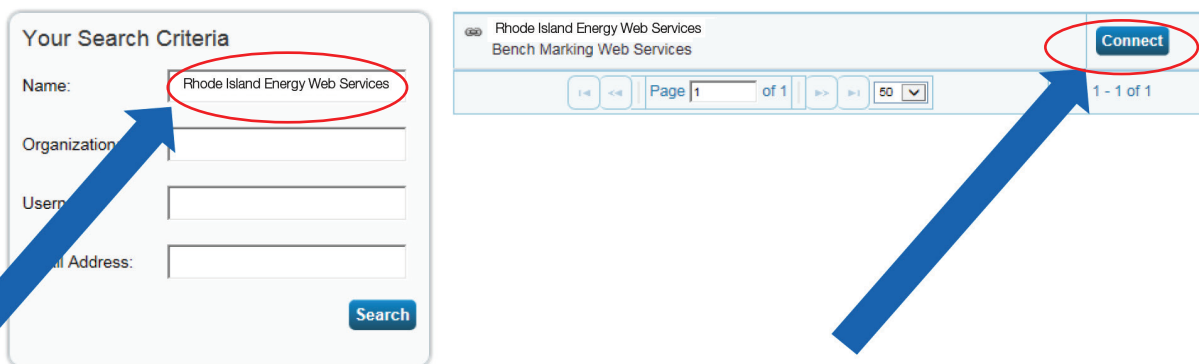


2) If Rhode Island Energy is connected, go to Step B below. If not:

- Click Add Contact.
- To search for Rhode Island Energy, enter
  - Name: Rhode Island Energy Web Services
- Click Search.
- From the list, locate “Rhode Island Energy 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.



**Your Search Criteria**

Name: Rhode Island Energy Web Services

Organization:

User:

Email Address:

**Search**

**Tip**  
Can't find what you are looking for? Try adjusting your search criteria.

Rhode Island Energy Web Services  
Bench Marking Web Services

Page 1 of 1

**Connect**

1 - 1 of 1

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



**Send a Connection Request to [Rhode Island Energy Web Services](#) to Begin Exchanging Data**

Rhode Island Energy Web Services requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [Rhode Island Energy Web Services](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use: **None Provided**

Agreement: \*  I agree to my provider's Terms of Use.

**Send Connection Request** [Cancel](#)

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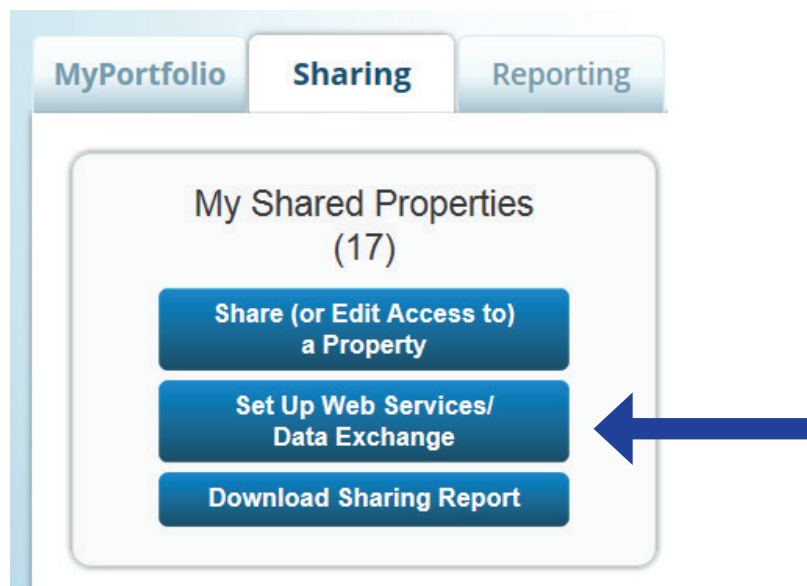
Follow Us [Twitter](#) [Facebook](#) [YouTube](#) [LinkedIn](#)

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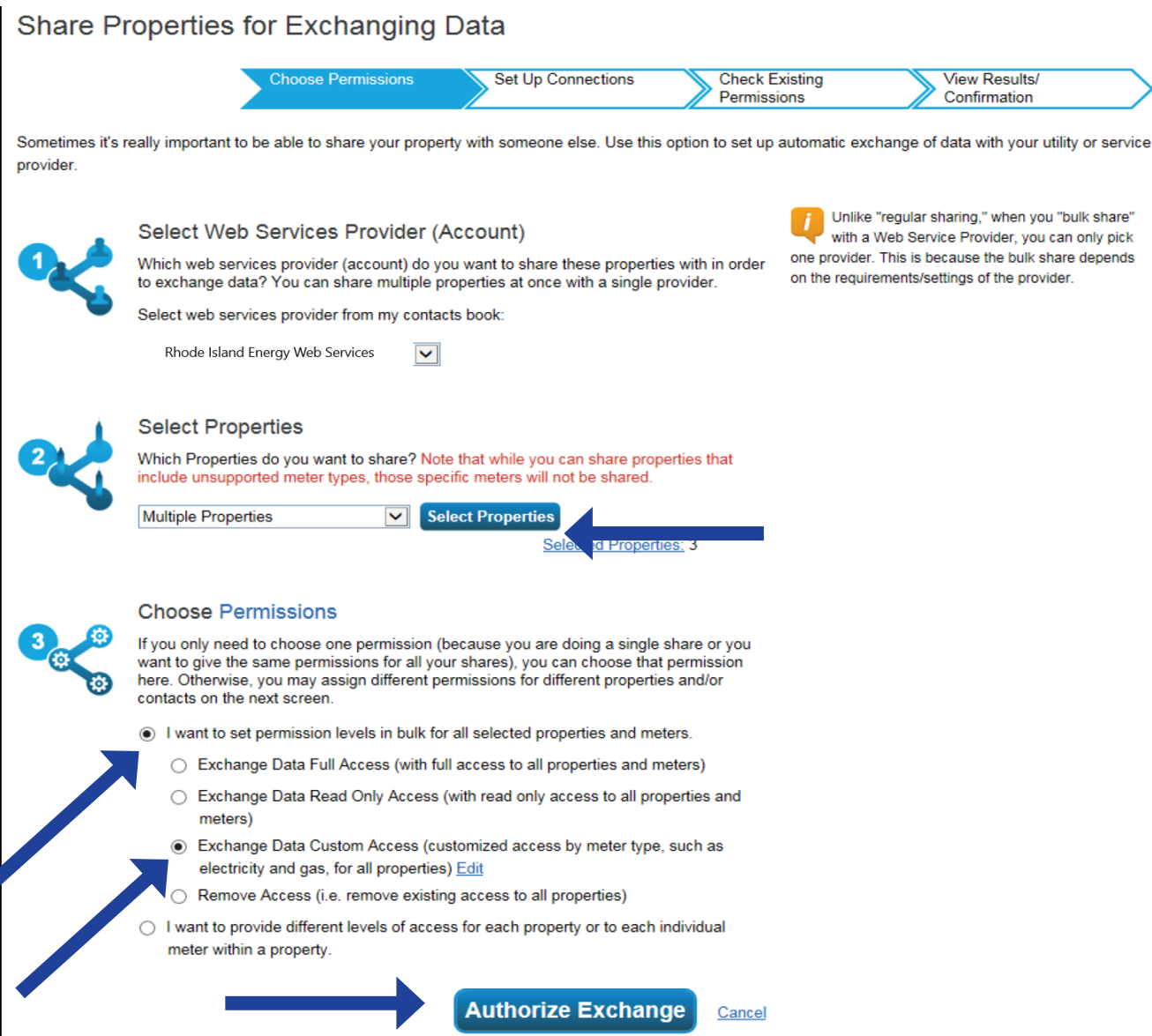
### 3) Share the Property

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

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



- 4) On the “Share Properties for Exchanging Data” page, go to “Select Web Services Provider (Account),” and choose “Rhode Island Energy 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 really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

**1 Select Web Services Provider (Account)**

Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.

Select web services provider from my contacts book:

Rhode Island Energy Web Services

**2 Select Properties**

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

Multiple Properties   [Selected Properties: 3](#)

**3 Choose Permissions**

If you only need to choose one permission (because you are doing a single share or you want to give 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.

I want to set permission levels in bulk for all selected properties and meters.
 

- 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) [Edit](#)
- Remove Access (i.e. remove existing access to all properties)
- I want to provide different levels of access for each property or to each individual meter within a property.

[Cancel](#)

- 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 Rhode Island Energy.
- If you need Rhode Island Energy 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 Rhode Island Energy 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 Rhode Island Energy.

### Select Custom Access Permissions for

Select the permission level below that you would like to grant [redacted] for each category.

Item	None	Exchange Data Read Only	Exchange Data Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ All Meter Information			
▼ Energy Meters			
Electric - Grid	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Natural Gas	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fuel Oil (No. 2)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▼ Water Meters			

Additional Options:

Item	Yes	No
* Share Forward Allow [redacted] to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input checked="" type="radio"/>	<input type="radio"/>

**About Permissions**  
Select permissions for each category. You must provide Read Only or Full Access to the Property Information to share a property.

**Property Information**  
Includes access to Property Information Summary, Details, and all meter information through the system. If you choose other options:

- If you want to delete or choose other options, you must choose Property Information.

**All Meter Information**  
Includes access to the Meters tab.

- None** – suppresses access to the Meters tab, so the person can't see your individual meters & bill entries. But annual metrics (based on the sum of these bills) are still accessible via Reporting.
- Read Only** – provides access to view meter entries, but not meter summaries.

**Rhode Island Energy requires “Exchange Data Full Access” in order to provide aggregate energy usage data.**

**You do not need to share access to specific energy meters with Rhode Island Energy, only access on the property level.**

- Make the following selections:
  - Property Information:** select “Exchange Data Full Access.”
  - Meter Information:**
    - For each meter displayed, choose “None” – even if existing Rhode Island Energy meters are listed.
      - You do not need to share access to specific energy meters with Rhode Island Energy.** After you have successfully shared your property, Rhode Island Energy 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 Rhode Island Energy, and may even be rejected, since meter-level shared access is not needed by Rhode Island Energy’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), 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 Rhode Island Energy up to 24 hours to validate and accept the initial share request.

## Bulk Share Properties for Exchanging Data: Results



✓ **Congratulations! You have successfully shared/edited access to your property(ies).**

A total of 3 share requests were sent.

If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

Close