Montgomery County Building Energy Benchmarking
HOW-TO GUIDE

A step-by-step guide to completing annual building energy benchmarking and reporting.

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INTRODUCTION

What is Energy Benchmarking? Energy Benchmarking is the process of tracking a building's energy use and using standard metrics to compare the building's performance annually.

What are the Benefits? Benchmarking improves our understanding of energy consumption patterns; quantifies energy performance to compare against past performance and to that of other similar buildings; helps identify energy saving opportunities within a portfolio of buildings; and manages business bottom line through consistent data collection and tracking. Read more about the Benefits of Benchmarking.

History of the Benchmarking Law
In May 2014, Montgomery County adopted Bill 2-14, Environmental Sustainability – Buildings – Benchmarking and amended the original legislation by Bill 35-15 Environmental Sustainability – Benchmarking – Amendments in November 2015 and by Bill 16-21 Environmental Sustainability - Building Energy Use Benchmarking and Performance Standards – Amendments in April 2022.

The Law requires the County and commercial building owners to:

- Track the energy use of buildings 25,000 gross square feet and greater in the county in ENERGY STAR Portfolio Manager,
- Have data verified by a Recognized Data Verifier the first year and every three years thereafter,
- Report data to the County by June 1st annually for public disclosure,
- Meet long-term site energy use intensity performance standards.

This guide focuses on the benchmarking portion of the Law. See DEP's website for more information about Building Energy Performance Standards.

Public and private commercial buildings must continue to benchmark and report data by June 1st each year. The Department of Environmental Protection (DEP) is responsible for the implementation of this Law.

WHICH BUILDINGS ARE COVERED?

Click here for the Montgomery County Building Inventory

For benchmarking purposes, a covered "building" has Gross Floor Area that is greater than 25,000 sq ft and is:
1. Any single structure utilized or intended for supporting or sheltering any occupancy, except if a single structure contains two or more individually metered units operating independently that have stand-alone heating, cooling, hot water, and other mechanical systems, and no shared interior common areas; OR
2. Two or more structures with shared heating, cooling, hot water, or other mechanical systems, shared interior common areas, or shared energy meters

Gross Floor Area:
- Gross floor area means the total building square footage measured between the principal exterior surfaces of the enclosing fixed walls of a building.
- Gross floor area is not the same as rentable space, but rather includes all areas inside the building(s).

WHO'S RESPONSIBLE?

The Owner listed in the tax records is responsible for compliance with the Benchmarking Law. Owners may include:

- Multiple owners in common ownership communities,
- Condo association,
- The board of directors,
- The owner of the building in a ground-lease arrangement.

Owners of buildings with tenants are responsible for compliance for the entire building, including tenant spaces. Data should be requested at the property level, also known as in aggregate, which will include usage data for individual units. Instructions on how to obtain this data can be found under Step 1, Collect Energy Data. Note that it may take 3 to 4 weeks to receive aggregated data.

WHAT YOU WILL NEED TO REPORT

To prepare for building energy benchmarking reports, you will need the following:

- ☐ Address for each building required to report.
- ☐ Montgomery County Building ID
- ☐ Basic property information including number of units and accurate gross square footage of the total building and of all building uses (e.g., square footage of ground floor retail and square footage of residential area).
- ☐ A list of all energy meters for each utility along with usage data for each meter that spans the entire calendar year being reported.
- ☐ If the building is reporting for the first time or its last verified benchmarking report was three years ago, data verification is required.

This guide provides step-by-step instructions on how building owners can comply with the annual reporting requirements. There are two websites you will use:

1. **Montgomery County Building Energy Benchmarking Reporting Portal. Within this site you can:**
   a. Claim your building(s)
   b. Enter and manage contact info
   c. Submit an extension, waiver, or exemption request
   d. Submit your annual benchmarking report
   e. Re-report data for previous calendar years or submit revisions to benchmarking data
   f. View compliance status and disclosed data for each building

2. **ENERGY STAR Portfolio Manager:** The Environmental Protection Agency's (EPA) ENERGY STAR Portfolio Manager (ESPM) is used for entering key building characteristics and energy usage data.

TASK 1: ENTER DATA INTO ENERGY STAR PORTFOLIO MANAGER

DEP requires the use of ENERGY STAR Portfolio Manager to enter building and energy use data each year.

STEP 1 - COLLECT ENERGY DATA

All energy usage must be reported on the building level. Energy includes electricity, natural gas, steam, chilled water, fuel oil, on-site solar, diesel for backup generation, or any other energy source.

You can access your data in two ways:

1. **Report using your own bills** *(this only works if you don't have any tenant paid bills)*

   Energy bills for whole-building utility consumption data can be accessed through an online utility login or past bill copies.

   Please note: The data must encompass January 1 to December 31 of the reporting year. You may need 13 months of bills to cover the calendar year. For example, bill copies from December 2022 through January 2024 would ensure the full calendar year 2023 is reported.

2. **Request aggregate data for all of the meters associated with the building**

   Whole building data for all meters associated with an address can be requested from Pepco, Washington Gas, Potomac Edison, or BG&E following the instructions below. Each utility provides data in an Excel file format for upload into Portfolio Manager OR in some cases, the utility site may be synced with ENERGY STAR Portfolio Manager to automatically transmit data each month.

   Each utility has a slightly different process, but typically only requires tenant authorization to release tenant data if your building has four or fewer tenants.

How to access whole-building aggregated data from each utility

Pepco (**Takes 3-4 weeks to for usage request to be approved**)

Note: If you previously enrolled in Pepco's Resource Advisor system, you must re-enroll in Pepco's new Energy Usage Data System (EUDS) system to set up whole-building electricity data aggregation and re-sync this feed to Portfolio Manager to continue to access whole-building electricity data.

- **Pepco** customers can find information on getting their Pepco data at Pepco Energy Benchmarking. The basic steps are outlined here:
  - To request data, email the Energy Usage Data System (EUDS) enrollment form to Pepco at support@exelonenergyusagedata.com. The form must list all service addresses associated with the property that will be included as part of the benchmarking reporting AND at least one known account or meter number at the property, such as the house meter, to verify these addresses.

- o Pepco will process the enrollment form and send a welcome email inviting you to verify your email and create a password for the EUDS platform.
- o Once in the EUDS platform, you will create a usage request and verify your tenants. Pepco will review your request.
  - ▪ Buildings with four (4) or fewer individually metered accounts will require the consent of each customer. The tenant authorization form for Pepco is available through this link.
- o The turnaround time for usage request approval is 3-4 weeks from the date of submission barring any data issues. If data issues are identified, Pepco will notify the user and work with the utility to get the corrected data. As such, please start early with any data requests.
- o Once your request has been approved, you are then able to sync EUDS to Portfolio Manager so that data is automatically sent to Portfolio Manager. This syncing process will transfer the data historically and as new bills become available. Instructions from EUDS here, Session 2.3.

Washington Gas

Washington Gas customers can find information on getting aggregated gas bill data at Washington Gas Energy Benchmarking. The basic steps are outlined here:

- Set up your account at the Washington Gas Benchmarking Portal
- Upload a list of all gas meter numbers servicing the building. The street address of the building is not acceptable.
- You are then able to sync your Washington Gas data to Portfolio Manager so that data is automatically sent to Portfolio Manager. This syncing process will transfer the data historically and as new bills become available. Reference the Washington Gas user-guide (p. 9 to 19) for detailed step-by-step instructions.

TIPS on gathering gas meter numbers

*Note: Washington Gas will not provide a list of meter numbers at your property **unless the meters are physically located inside each unit** (e.g. a condo building with meters inside each unit or on the balcony of each unit only accessible via access to the unit). If this is your situation, please email Energy@MontgomeryCountyMD.gov to request a spreadsheet that can be sent to WGL to request a list of meter numbers.*

*If meters are **not** inside each unit, you will need to collect a list of meter numbers at the property. Each meter number is a 6-digit number starting with a letter and with 5 numbers behind it, e.g. Z12345 and can be recorded off of the physical gas meter:*

Potomac Edison

- **Potomac Edison** account holders can log-in to their account on the First Energy website to retrieve their data electronically or send an email to aggdata@firstenergycorp.com for commercial aggregated usage data requests. The basic steps are outlined here:
  - Send an email with a list of meter numbers servicing your property and the time period for which you are requesting data. You must send an email to request updated data each year.
  - Potomac Edison will email you back a spreadsheet containing aggregated, monthly electricity usage which you can then enter or upload into Portfolio Manager.

Baltimore Gas & Electric

- **BG&E** offers information on getting electronic BGE energy data at Automated Benchmarking.

Working with Uncooperative Tenants

As described above, utilities generally require tenant authorization to provide aggregated data if there are 4 or fewer meters in the building. Sample text is provided below to communicate with tenants about the law's requirements of them:

Dear [owner/tenant/resident],

To comply with Montgomery County's Energy Benchmarking Law, we are requesting that you provide tenant authorization so that we may obtain whole-building utility data for our property. The data we receive from the utility is aggregated and anonymized.

Per [the Law](the Law), " Within 30 days after receiving a request for information from the building owner, each tenant of a unit in a covered building must provide the building owner with all information that the owner cannot otherwise acquire that is necessary to comply with this Article."

If our property fails to comply with the energy benchmarking requirement, we may be subject to a Class A Violation. Thank you for your assistance in gathering the needed information to comply with the Montgomery County Benchmarking Law.

STEP 2 - CREATE A PORTFOLIO MANAGER ACCOUNT

Create an account in ENERGY STAR Portfolio Manager (ESPM). If you already have an account with your buildings and meters set up, you can skip to Step 6, Enter Your Monthly Utility Data.

1. Go to https://portfoliomanager.energystar.gov/pm/signup

2. Fill in the required information.

Please note: Compliance confirmations and other important emails will be sent to the email address that you register with. EPA strongly recommends **creating a corporate account** which "owns" all of your company's properties to avoid challenges with personnel changes. An administrator can share/unshare properties with employees' individual accounts as necessary. When an employee leaves, this main corporate account can "unshare" with her/him. Also note - usernames cannot be changed, so select a username based on the organization, not on an individual's name.

STEP 3 - ADD YOUR PROPERTY TO ENERGY STAR PORTFOLIO MANAGER

1. Once you've created an account, click on the "Add a Property" button.

2. Enter the primary property use and characteristics and click "Get Started."

   Note: Portfolio Manager requires accurate property use and operating information to help normalize energy use. You must select the property type that most accurately represents your building's usage and operations. If you are unsure what type of property your buildings are, view Portfolio Manager's property type definitions of the 18 broad building type categories and, within those, 80+ choices for property type.

   You may use Portfolio Manager's Data Collection Worksheet to find out and download a worksheet of what information will be required for your property type(s).

3. Enter basic property information.

   a. Give your property a name.

   b. Enter the property address.

   c. Enter year built and occupancy. If a 'year built' is not readily available, we suggest using the year built as identified in tax records.

   d. Enter the building's gross floor area. Gross floor area is measured as the space between the exterior surfaces of the building's enclosing fixed walls, subject to the inclusions and exclusions below.

      i. **INCLUDE** tenant areas, common areas, meeting areas, restrooms, elevator shafts, stairways, basement space, mechanical equipment areas, and storage rooms.

      ii. **EXCLUDE** all parking areas, exterior loading docks, exterior balconies, driveways, unroofed light wells, and plenums between floors.

   e. Enter your Montgomery County Building ID (MBID) in the Standard ID box.

      i. In the Standard IDs box, select "Montgomery County, MD Building ID (MBID)" from the dropdown menu under "**Standard ID - County/District:**".

ii.   Enter your **MBID** in the ID field. Remember, you can look up your MBID through the DEP Private Building Inventory.

f.   Read the "Do any of these apply?" checkboxes and select any that apply. Click "Continue."

For additional guidance, review this ENERGY STAR Portfolio Manager video detailing how to set up a property.

STEP 4 - ENTER PROPERTY DETAILS

Enter the gross floor area and details for each type of property use in the building.

DEP recommends breaking out all property use types and gross floor area in ENERGY STAR Portfolio Manager if they meet one of the following criteria:

- The space accounts for at least 10% of the property's total GFA
- The space is a high-intensity use type (like data center, laboratory, restaurant, supermarket, swimming pool, etc)

Follow these steps to ensure building uses are accurately defined.

1.   If you have additional property use types in the building (for example, Office, Restaurant, etc.) find each one in the "Add Another Type of Use" dropdown box and click "Add." Be as specific as possible in including additional building uses. A list of definitions of each property type is available here.

2. Enter the gross floor area and property use details for each property use type.

Please note: *Entering the gross floor area of each property use in the building will allow DEP to provide you an accurate area-weighted building energy performance standard that takes the size of each use type into account.*

3. Enter Parking Use details (if applicable). Parking is not included in the gross floor area of the building, but Portfolio Manager requires parking use details to be entered if the property's energy consumption includes parking areas.

4. Click "Add Property".
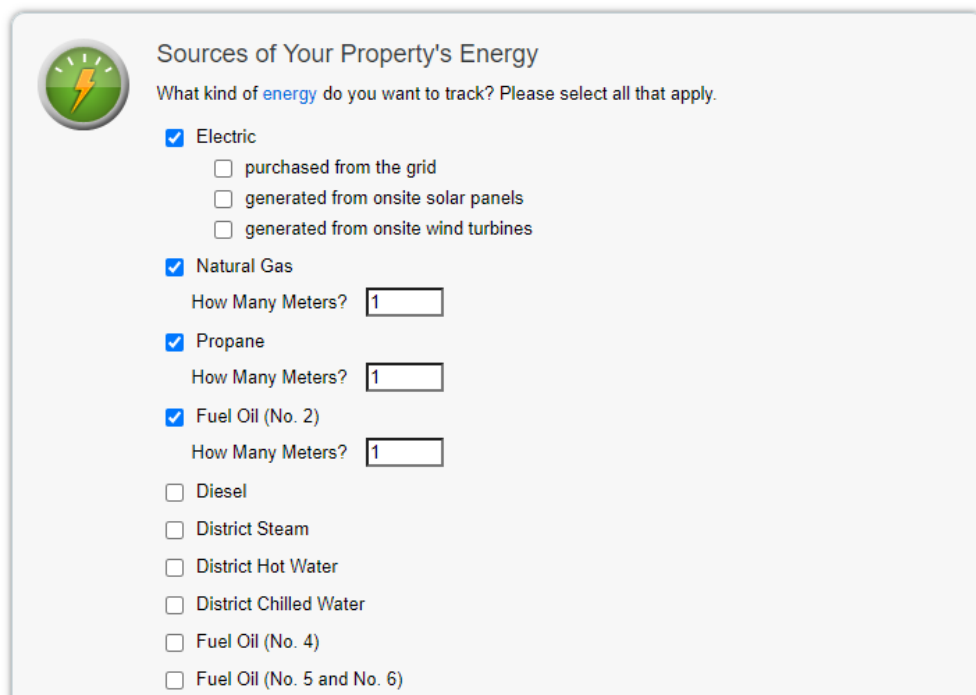
- Review the U.S. List of Portfolio Manager Property Types, Definitions, and Use Details here. This guide provides additional advice for picking a property type.
    - Before selecting "Other", it is <u>highly</u> recommended that you review the full list of property uses available for selection or contact DEP to ensure that there is not a suitable category for your property.
    - If your property doesn't fit neatly into one of the 80+ property types in Portfolio Manager, please contact Energy@MontgomeryCountyMD.gov for advice.
- DEP recommends breaking out all property use types and gross floor area in ENERGY STAR Portfolio Manager if they meet one of the following criteria:
    - The space accounts for at least 10% of the property's total GFA

o The space is a high-intensity use type (like data center, laboratory, restaurant, supermarket, swimming pool, etc)
- Use Portfolio Manager to find out what information will be required for your property type and to download a Data Collection Worksheet.
- **Have Tenants?** Building owners must request any space data needed in writing to the tenant no later than March 31 of each compliance year. Tenants must respond within 30 days of a request, per the Benchmarking Law.

STEP 5 - ADD METERS WITH CORRECT UNITS

Set up your energy meters in Portfolio Manager with the correct units of measure.

You should add at least one meter for each of the energy sources serving your building. This would include electricity, natural gas, onsite renewable energy, district energy, and any delivered fuels (like propane or diesel, even though there may not be a physical meter associated with the fuel at your building).

If you have received whole-building utility data, you can create one 'meter' to represent your building's total use regardless of how many physical meters there are in the building. (For example, if you have received whole-building data from the utility for the 300 electricity meters at your building, you will only add one electricity meter.)

If you are entering utility data manually, you should create a meter for each of your billing accounts. (For example, if you have two electricity accounts/meters at the building and will be entering bills for each of those accounts, you should create two electricity meters.)

1. On the "Energy" tab of your new property, click "Add A Meter".

2. Select each utility type that your building uses.

3. Click "Get Started" to enter units of measure and dates for each meter.

4. Double-check the units to make sure they align with your data.

    o Electricity bills provide kilowatt-hours (kWh) as the unit of consumption

    o Natural gas bills typically provide **BOTH** Therms and CCF (hundred cubic feet). Either unit can be selected in Portfolio Manager but must be entered consistently based on the unit you select.

5. The "Date Meter Became Active" is the start date of the energy data you collected.

Please Note: *It is common that billing cycles do not begin on the first of the month. You may, for example, need to begin your reporting period in December 2022 in order to include the beginning of January 2023. The "Date Meter Became Active," is the first day of the first billing period, even if that is in the year prior.*

About Your Meters for 123 Main St

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

4 Energy Meters for 123 Main St (click table to edit)

	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Met ID 1 Name
☐	Natural Gas	Natural Gas		therms	01/01/2018	☑		☐	
☐	Fuel Oil (No. 2)	Fuel Oil (No. 2)		Gallons (US)	01/01/2018	☑		☑	
☐	District Steam	District Steam		kLbs. (thousand pounds)	01/01/2018	☑		☐	
☐	Aggregate Eversource Data Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	01/01/2018	☑		☐	

✖ Delete Selected Entries
✚ Add Another Entry

Back   **Create Meters** Cancel

6. Click "Create Meters."

7. A list of meters created are shown in the next page. To finish setting up the meters, click "Continue".

▶ **Electric Grid Meter**

Continue Cancel

8. Select Meters to Include in Metrics. After selecting the meters that you are reporting on, check the checkbox for "These meter(s) account for the total energy consumption for …". Then click "Apply Selections" to finish setting up your meters.

STEP 5a - SYNC WGL/EUDS WITH EXISTING ESPM ACCOUNT.

Once you have set up your accounts and have data usage requests approved at WGL or EUDS, please follow the instructions below to link them with your ESPM account. If you need help, please reach out to Energy@MontgomeryCountyMD.Gov

- Instructions to link WGL Benchmarking with Existing ESPM Account: page 9 -19.
  - o Washington Gas Benchmarking Portal

- Instructions to link EUDS with existing ESPM Account: Section 2.3.
  - o Energy Usage Data System

STEP 6 - ENTER YOUR MONTHLY UTILITY DATA

Enter your monthly energy use data.

If you have not already synced the aggregated utility data to automatically upload in ENERGY STAR Portfolio Manager (see Step 1), there are two ways to enter your data:
- Manually add your monthly utility data
- Use the single-meter-spreadsheet upload. Note that you must use simple "spreadsheet template" downloaded from ESPM (each fuel type has a different spreadsheet)

If you've received whole-building data from your utility, data is either provided in an Excel format that can be uploaded to Portfolio Manager, or able to be automatically uploaded from the utility site to Portfolio

Manager. Click on the "Choose File" button for the meter, find the appropriate Excel file, and click "Upload." If the upload does not work, transfer the data to the "single-meter spreadsheet" template provided.
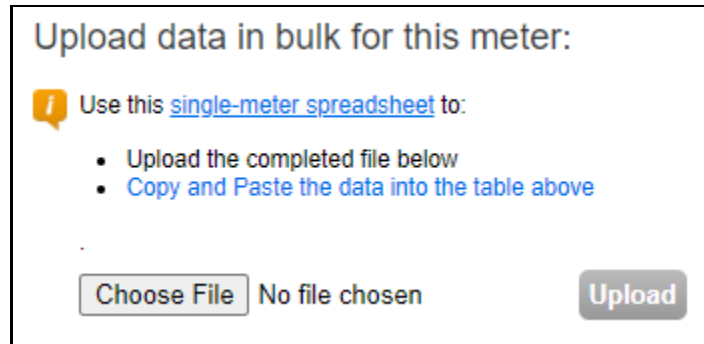
If you're entering data manually, you may select "Click to add an entry". Data must encompass the entire calendar year that you are reporting on, from January 1 through December 31.

Please note the following:

- Entering cost data is not required.

- Always check to make sure your units are correct.

- DEP does not accept estimated data. Estimated values are not acceptable with a benchmarking report submitted for compliance. Enter only actual monthly energy usage data values into each meter and uncheck the 'Estimate' box by each value.

    o *If the utility has provided estimated readings, do not mark the "estimated" box in Portfolio Manager.*

- Portfolio Manager does not automatically save your data, so you must click "Continue" when you're done entering your data.

- Make sure that there are no date gaps in the data reported and all meters are updated. Portfolio Manager requires all 365 days in the calendar year in order to calculate Site Energy Use Intensity. You may collect 13 bills to cover all of the calendar days in the reporting year. Even if only one day is missing, or one meter hasn't been updated, the energy report cannot be generated.

- Ensure all meters are selected and checkbox for "These meter(s) account for the total energy consumption for …" are checked. Click "Change Meter Selection" to confirm:

STEP 6a - ONSITE RENEWABLE ENERGY

If your building generates/uses onsite renewable energy, it is important to properly benchmark it. Doing so will allow your building to claim a Renewable Energy Allowance for compliance with Building Energy Performance Standards. The renewable energy allowance will credit all electricity generated from onsite renewable energy systems, whether used onsite or exported back to the grid.

Utility electricity bills do *not* contain all of the information necessary to benchmark your onsite renewable energy use. To benchmark buildings with onsite renewable energy, you will need at least two electricity meters: One or more meters to track the total amount of electricity purchased from the grid; and one meter to track electricity generated onsite using solar panels and/or wind turbines.

The process for creating an onsite renewable energy meter is the same as outlined above:

The following fields are critical for accurately calculating your site EUI and amount of renewable energy:

- **Grid delivered electricity**: Utility bills will provide the net grid delivered electricity provided by the utility (grid electricity minus renewable energy produced and used on site). Enter this figure into your meter(s) tracking the total amount of electricity purchased from the grid. (If this number is negative, see below for entering solar energy exported offsite.)
- **Renewable energy generated on-site**: Because utility bills do not show the total renewable energy generated/used on-site, you will likely need to reference generation data from your renewable system.
    - **Renewable Energy Used On Site**: Enter the total electricity generated and used onsite from renewable systems in the solar or wind electricity meter.
    - **Renewable Energy Exported Offsite**: In some cases, onsite renewable systems generate more electricity than is used onsite at the building. In this case, excess generation is thus exported back to the grid and your electricity bill may display a negative number. Enter any electricity exported offsite in the solar or wind electricity meter. Enter any exported renewable energy as a positive number, even if your utility bill shows a negative reading.

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Here is an example of a property exporting excess renewable energy off-site:

Details of your Electric Charges

Non-Residential-MGT-LV IIB - service number ▇▇▇▇▇▇▇▇
Electricity you used this period

Meter Number Energy Type	Current Reading	Previous Reading	Difference	Multiplier	Total Use
▇▇▇▇▇▇	Mar 22	Feb 17			
On-Peak Use (kWh)	999831 (actual)	999940 (actual)	109	160	−17440
Int-Peak Use (kWh)	999888 (actual)	999949 (actual)	61	160	−9760
Off-Peak Use (kWh)	000288 (actual)	000312 (actual)	24	160	−3840
On-Peak Demand (kW)	0.390 (actual)			160	62.40
Int-Peak Demand (kW)	0.380 (actual)			160	60.80
Off-Peak Demand (kW)	0.370 (actual)			160	59.20

Total use-kWh −31040
Your next meter reading is scheduled for April 21, 2022

The utility bill shows a negative number, meaning excess renewable energy is being sent to the grid. This period, 31,040 kWh of solar energy was exported offsite.

Per generation data for the solar array (not available on the bill), for this time frame, the energy system generated a total of 48,699 kWh.

This property would thus enter three values into ESPM:
- **Electricity meter (purchased from the grid):** 0 kWh
- **Electricity meter (generated from onsite solar panels):**
  - Renewable energy used on site: 17,659 kWh (48,699 produced – 31,040 exported)
  - Renewable energy exported offsite: 31,040 kWh (negative reading from the bill)

Additional information on How to Benchmark Properties with Onsite Renewable Energy is available here.

STEP 7 - RUN THE DATA QUALITY CHECKER

1. Click on the "Summary" tab for your property. Click "Check for Possible Data Errors". Run a check for the year that you are reporting. For example, if reporting CY 2023 data, select the year ending December 31, 2023.

- o A common first-time error is "Less than 12 Full Calendar Months of Bills." Revisit the identified meter and make sure all of the calendar year is covered, with no gaps.
- o *Ignore errors related to water or waste meters since they are not required for Montgomery County Benchmarking Reporting.*

2.   Re-run the checker once you have made any necessary corrections.

3.   Once you are satisfied that you have addressed any errors, proceed to Step 8.

STEP 8 - ENTER ANY CONTEXTUAL INFORMATION IN PROPERTY NOTES

Enter any contextual information about your building's energy performance.
1. Click on the "Details" tab of your property and scroll down to "Property Notes." Enter here any relevant contextual information about your building, such as if:
    a) Building has achieved the ENERGY STAR certification for at least 6 months of the calendar year being benchmarked, which can be used as data verification. List "ENERGY STAR Certification used for verification" and the month and year certification was achieved.
    b) The building has any fuels/oil delivered during the reporting year.
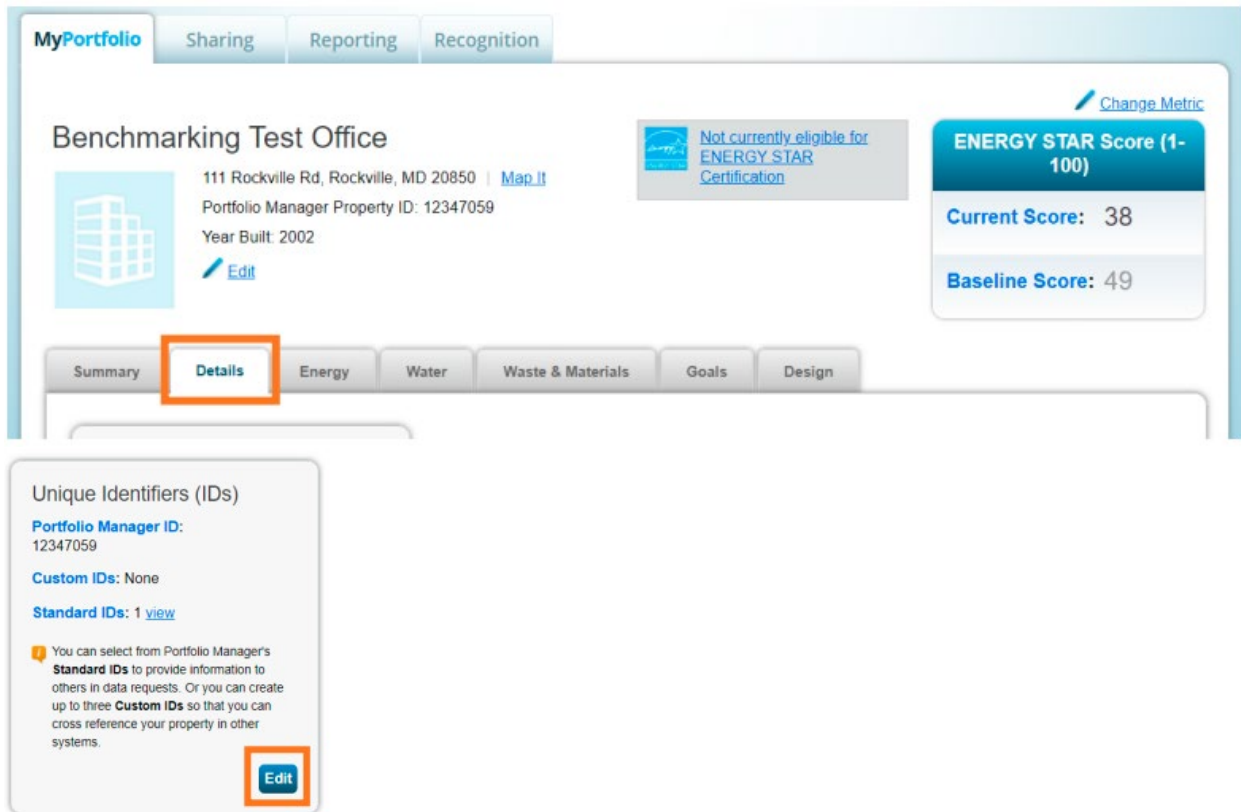   c) Building occupancy such as tenant move-out which may cause low energy use.

2. Click "Save Notes" when you're done.

Need more space for contextual information? If your information does not fit into the 1000-character limit, you may provide it by emailing it to Energy@MontgomeryCountyMD.gov

STEP 9 - ENTER YOUR MBID

If you did not enter your Montgomery County Building ID upon first creating your property or need to revise your Montgomery County Building ID, you may update it on the "Details" tab at any time.
1. To find your Montgomery County Building ID, reference the DEP Private Building Inventory.
2. On the "Details" tab of your property, scroll to the "Unique Identifiers (IDs)" box and click "Edit."

3. Under "Standard IDs," select "Montgomery County, MD Building ID (MBID)" from the dropdown menu under "**Standard ID - County/District:**" Enter your MBID number exactly as it appears in DEP's covered buildings list, including any zeroes at the beginning of the ID.

Standard IDs

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

Standard ID - City/Town:

[▾] ID: [   ]

Standard ID - County/District:

[Montgomery County, MD Building ID (MBID) ▾] ID: [01234567]

Standard ID - State/Province:

[▾] ID: [   ]

Standard ID - Other:

[▾] ID: [   ]

➕ Add Another

Without entering the MBID in Portfolio Manager exactly as it appears, your property will be deemed non-compliant.

4. " **Enter your MBID** and click "Save."

STEP 10 - SHARE YOUR BUILDING WITH MONTGOMERY COUNTY DEP WITHIN ENERGY STAR PORTFOLIO MANAGER

Montgomery County uses ENERGY STAR Portfolio Manager's (ESPM) data sharing capabilities. This allows DEP to pull data directly from ESPM and run basic data checks.

The following two actions are required of all building owners in order to correctly share your energy with the County.

1. **Connect** your Portfolio Manager account with Montgomery County's Portfolio Manager account.

2. **Share** read-only access for your covered buildings.

Please note: **You will only need to complete these actions once. Unlike previous reporting years, you will *not* receive a separate reporting link to submit your energy data, you will use the Montgomery County Building Energy Benchmarking Reporting Portal to submit your data.**

If your building is successfully shared with the Montgomery County DEP Team within ENERGY STAR Portfolio Manager, the below message will appear on your Montgomery County Reporting Form.

> ⊘ This building is shared correctly!

If your building is **not** connected through Portfolio Manager, you will see the below message on your Montgomery County Reporting Form.

> ⓘ This property has not been shared with the Montgomery account in Energy Star Portfolio Manager yet. | How to Report Guide |

Please follow the steps below to confirm that your building is correctly shared with Montgomery County within ENERGY STAR Portfolio Manager and that your MBID has been entered correctly. If you failed to enter your MBID in Portfolio Manager, you will continue to receive the error message below.

CONFIRM YOUR ACCOUNT INFORMATION

1. Confirm that your email address in your Portfolio Manager account is correct. Click on "Account Settings" in the upper right-hand corner of the screen.

2. Confirm that your unique Montgomery County Building IDs have been entered correctly for your buildings.

CONNECT YOUR PORTFOLIO MANAGER ACCOUNT WITH MONTGOMERY COUNTY

1. Click "Contacts" in the upper right-hand corner of the screen.
2. Click "Add New Contacts".
3. Search for the username "**MontgomeryDEP**".
4. Click "Connect".

5. A pop-up window will appear. Click "Send Connection Request"

Send a Connection Request to Montgomery County Department of Environmental Protection to Begin Exchanging Data

Montgomery County Department of Environmental Protection 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 Montgomery County Department of Environmental Protection. Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.
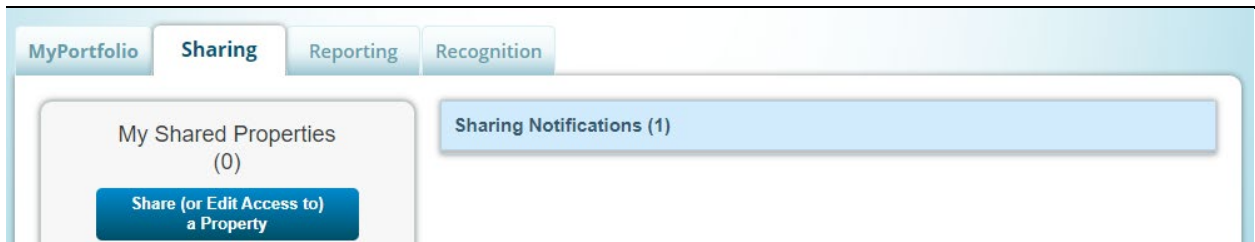
Terms of Use: None Provided

Send Connection Request   Cancel

Please note: Connection requests must be approved before you can share your buildings. Portfolio Manager will approve these requests in cycles of 30 minutes. If you have not received a connection confirmation email within one hour of submitting a request, please contact Energy@MontgomeryCountyMD.gov.

SHARE READ-ONLY ACCESS TO YOUR DATA WITH MONTGOMERY COUNTY

Once your account is connected with Montgomery County DEP, you can start sharing properties.

1. Go to the "Sharing" tab at the top of the page in Portfolio Manager.

2. Click "Share (or Edit Access) to a property":

MyPortfolio | **Sharing** | Reporting | Recognition

My Shared Properties (0)

Share (or Edit Access to) a Property

Sharing Notifications (1)

3.   Select your covered buildings and click "Apply Selection".

   - **Please note:** If you are sharing a campus with multiple buildings, share **both** the campus and the individual buildings within the campus. If are you have set up a campus property to report to the state's Maryland Department of Environment, you need only share/report the individual building to DEP.

4.   Select "**MontgomeryDEP"** as the recipient.

5.   Select "Personalized Sharing & Exchange Data ("Custom Orders")" and click "Continue":

6.   Select "Exchange Data" for each property.

7.   A pop-up window will appear. Specify data attributes and permissions for each property.

- Select "Read Only Access" for "Property Information" and "All Meter Information."

- Select "None" for "Goals, Improvements, & Checklists" and "Recognition".

- Select "Yes" for "Share Forward".

8.   Click "Apply Selections & Authorize Exchange".

9.   Once you've completed Exchange Data access for each property, click "Share Property(ies)".

Once the County accepts the shared properties, you'll receive a confirmation email.

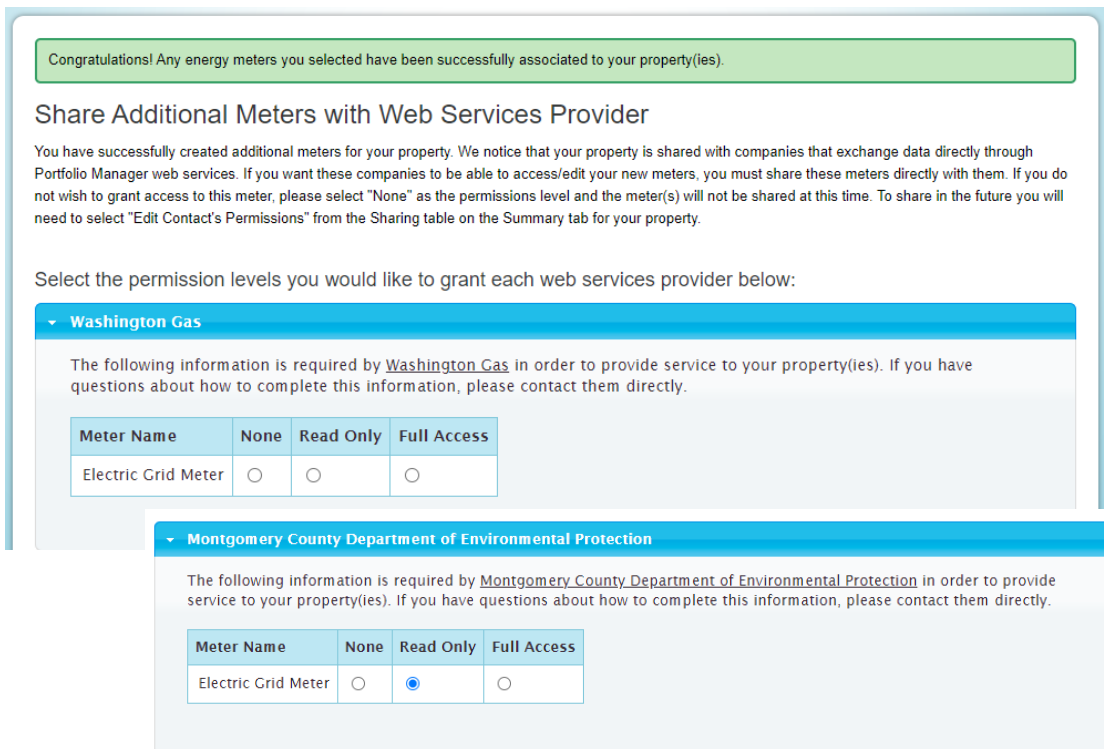For additional guidance on sharing properties within Portfolio Manager, click here.

10.   To confirm sharing, you should see "MontgomeryDEP" in the Sharing this Property table of the Summary Tab.

You will receive a confirmation email within an hour once the property share request has been accepted. If you do not receive an email, please check your "spam" or "junk" folder.

Please note that if you ADD new meters to your property, you will also need to share those with MontgomeryDEP. ENERGY STAR Portfolio Manager will prompt you to share any new meters with existing connections:

TASK 2: COMPLETE DATA VERIFICATION

Verification is considered an industry best practice and ensures that building and energy data entered into Portfolio Manager are accurate. The purpose of verification is to enhance the quality of data being reported collectively through the Benchmarking Law and ensure data are correct and useful to the building owner and staff. Verification requires review by someone with knowledge about Portfolio Manager and building energy performance.

DATA VERIFICATION OPTIONS

1. Achieve ENERGY STAR certification for at least 6 months of the calendar year being benchmarked. If using this verification path, please indicate this in the Property Notes field, as described in step 8 above by stating "ENERGY STAR Certification used for verification" and the month and year certification was achieved.

2. Have a Recognized Data Verifier review and sign-off on your report.

WHO CAN COMPLETE VERIFICATION

Building owners must demonstrate that reported benchmarking data is verified by a Recognized Data Verifier. A Recognized Data Verifier is a professional with a current verification credential that is recognized and approved by the DEP Director (see table below). The verifier can be in-house staff or from a third-party firm.

Verification Credential	Institution / Association
Professional Engineer (PE)	National Society of Professional Engineers
Licensed Architect	National Council of Architectural Registration Board
Registered Architect (RA)	American Institute of Architects (AIA)
Certified Commissioning Authority (CxA)	AABC Commissioning Group (ACG)
Certified Energy Manager (CEM)	Association of Energy Engineers (AEE)
Certified Energy Auditor (CEA)	AEE
Certified Building Commissioning Professional (CBCP)	AEE
Certified Measurement and Verification Professional (CMVP)	AEE
Energy Management Professional (EMP)	Energy Management Association
Existing Building Commissioning Professional (EBCP)	AEE
LEED AP Operations + Maintenance (LEED-AP O+M)	US Green Building Council (USGBC)
LEED-Fellow – For outstanding APs	USGBC
Building Energy Assessment Professional (BEAP)	ASHRAE
Building Energy Modeling Professional (BEMP)	ASHRAE
Building Commissioning Professional Certification (BXCP)	ASHRAE
Operations & Performance Management Professional (OPMP)	ASHRAE
Certified Commissioning Professional (CCP)	Building Commissioning Association (BCA)
Associate Commissioning Professional (ACP)	BCA
Sustainability Facility Professional (SFP)	International Facilities Management Association (IFMA)
Certified Facility Manager (CFM)	IFMA
RPA/FMA High Performance Designation (RPA/FMA-HP)[1]	BOMI International
Systems Maintenance Technician (SMT)	BOMI International
Systems Maintenance Administrator (SMA)[2]	BOMI International
Real Property Administrator (RPA) with caveat requirements	BOMI International
Certified Property Manager (CPM) with caveat requirements	Institute of Real Estate Management (IREM)

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[1] RPA must have been achieved with the elective course, Asset Management OR achieved with completion of at least 3 of the 5 Sustainability/High Performance Experience Criteria. Submit documentation to energy@montgomerycountymd.gov.

[2] CPM must have been achieved with the following three functions selected and illustrated in the Experience Requirements: #3, #30, and #33. Submit documentation to energy@montgomerycountymd.gov.

Resources:

- [Montgomery County Green Bank Technical Assistance](#) program can connect property owners with a service provider to benchmark the building and provide data verification, and can provide financial support to help cover the costs. Follow the link above to learn more and apply for technical assistance.
- [Benchmarking Ambassadors](#): The list contains stakeholders, volunteers, and energy service companies who received an orientation to the Benchmarking Law on how to properly benchmark in Portfolio Manager to comply with the Benchmarking Law. Feel free to reach out to these Ambassadors as a resource. Many offer benchmarking and/or verification services to help you comply with the Benchmarking Law.

FOR THE BUILDING OWNER:

CONFIRM IF YOU NEED TO VERIFY THIS YEAR

All buildings must get their data verified for the first year they are required to report and every 3 years thereafter. Data Verification is required if:

- Your building has never been reported/verified before.

- Your building was last verified in the 3 years ago.

There are two ways to determine whether your property is due for data verification:

1. Navigate to the [Montgomery County Building Energy Benchmarking Reporting Portal](#). Click the gear icon in the Actions Column, and choose Submission for the building in question:

2. Navigate to the Data Verification tab to see if your property is due for data verification:

3.   Email Energy@MontgomeryCountyMD.gov to see if your building needs data verification.

If data verification is NOT needed, you may go straight to submitting your report to DEP. Instructions on submitting your report can be found below, in Task 4.

SHARE YOUR DATA WITH YOUR VERIFIER THROUGH ENERGY STAR PORTFOLIO MANAGER
Your Verifier will need access to your Portfolio Manager account data. You will need your Verifier's Portfolio Manager username to share data with them.

CONNECT YOUR PORTFOLIO MANAGER ACCOUNT WITH THE VERIFIER

1. Click "Contacts" in the upper right-hand corner of the screen.
2. Click "Add New Contacts".
3. Search for the username of your verifier
4. Click "Connect".

Please note: Connection requests must be approved before you can share your buildings.

SHARE FULL ACCESS TO YOUR DATA WITH YOUR VERIFIER

1. Go to the "Sharing" tab in Portfolio Manager.
2. Click "Share (or Edit Access) to a property".
3. Select your Montgomery County properties and click "Apply Selection".

Please note: If you are sharing a campus with multiple buildings, share *both* the campus and the individual buildings within the campus. For guidance on buildings that share systems, see the FAQ section below.

4.   Select your verifier's username as the recipient.
5.   Select "Bulk Sharing ("One-Size-Fits-All")" and select "Full Access".
6.   Click "Share Property(ies)".

For additional guidance on sharing properties within Portfolio Manager, click here.

FOR THE DATA VERIFIER:

STEP 1 - COLLECT ANY INFORMATION NEEDED FROM THE BUILDING OWNER

Verification Actions	Information Type to Verify	Data Sources Typically Requested by Verifiers
Confirm gross floor area	Whole Building Gross Floor Area	• Blueprints, Architectural Plans, BOMA documents, tax records
Confirm breakdown of property types within the building, and gross floor area of each	Property Use Types; Gross Floor Area	• Architectural plans, rent rolls
Confirm unit count is accurate in ESPM *(residential only)*	Number of Units in the Building	• Rent Roll • Rental Unit Registration
Confirm that <u>all</u> energy consumption from all meters serving the building – both common area and tenant – are accounted for. Energy consumption may include delivered fuels like fuel oil or diesel as well as on-site renewables.	Number of Meters in the Building, Delivered Fuels	• Meter Numbers by Fuel Type • Utility and Energy Bills • Utility data aggregation platform (to review meters included) • List of Addresses Served by Shared Systems
Confirm all energy use is accurately reported in ESPM.	Annual Usage from All Energy Types: Electric, Gas, Steam, and Fuel Deliveries	• Online Access to Data Request Portals • Copies of Energy Bills

Please note: When requesting access to utility data sources, this may require login access to benchmarking portals or bill copies. This will help in confirming that any aggregate data was correctly requested for the **entire** building and entered by the owner.

Utility data is typically accessed in two ways.

1. If an owner pays energy bills for the whole building, usage data can be accessed through an online utility login or past bill copies.

2. If multiple owners or tenants pay energy bills, whole-building energy use for all meters associated with an address can be requested from Pepco, Washington Gas, Potomac Edison, BG&E (see Task 1, Step 1).

It is essential that Data Verifiers confirm that all meters serving the property are included in the aggregated data if the property is obtaining whole-building aggregated data from the utility.

STEP 2 - RUN THE DATA QUALITY CHECKER WITHIN PORTFOLIO MANAGER
The Data Quality Checker runs a set of basic data checks on buildings to help identify possible data entry errors and if the building differs from typical operational patterns.

1. Click on the "Summary" tab for each building.
2. Scroll down to the "Data Quality Checker" box and click on "Check for Possible Errors".

Running a data quality check will help identify possible issues prior to completing the Data Verification Checklist.

STEP 3 - REVIEW THE DATA IN PORTFOLIO MANAGER USING THE ENERGY STAR DATA VERIFICATION CHECKLIST
Use the ENERGY STAR Data Verification Checklist as a guide during the verification. The ENERGY STAR Data Verification Checklist can be accessed from the 'Reporting' tab within Portfolio Manager. Check off each section as you review it for correctness.

Please note: **The ENERGY STAR checklist does not perfectly align with what is required for verification with Montgomery County DEP.** The checklist contains some information that is not required for verification. For Benchmarking Law verification, you can <u>omit</u> the water, waste, and indoor environmental standards sections.

Here is a link to a sample ENERGY STAR Data Verification Checklist.

The following are a list of items that must be checked during the verification process.
- **Primary Function**: Confirm that the primary use of the building is correctly defined. Reference the ENERGY STAR property list types if necessary.
- **Location**: Confirm that the address is correctly entered for the building.
- **Gross Floor Area (GFA)**: Confirm the gross floor area is accurate for the building. This value should be verified via architectural drawings or other records.
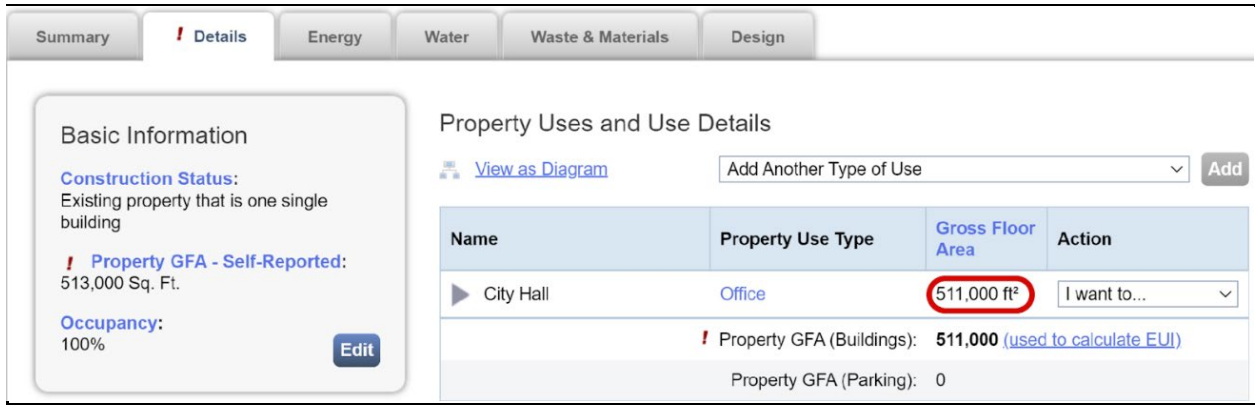
    To view where GFA is entered:
1. Navigate to the "Details" tab
2. Locate the "Property GFA - Self-Reported" value under "Basic Information"
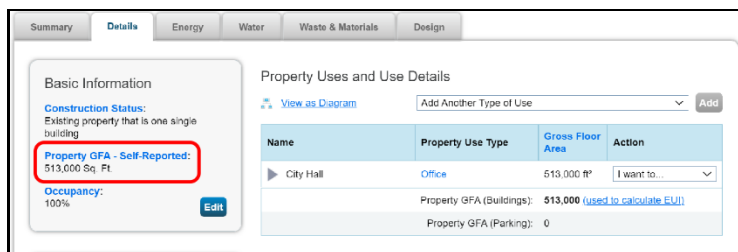
- **Gross Floor Area (GFA) for each building use**:

  To view where GFA for each building use is entered:
  1. Navigate to the "Details" tab
  2. Locate the "Gross Floor Area" column under "Property Uses and Use Details"
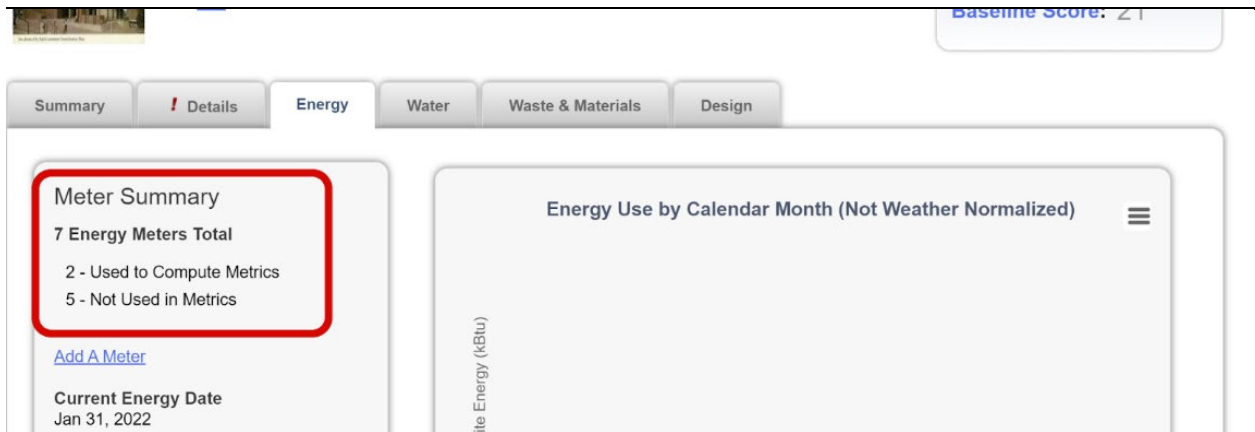
- **Summary of All Associated Meters**: Confirm that the meters shown account for the total energy use of the building. Confirm that any additional fuels or on-site solar or wind is defined if necessary.

  Please note: This total may differ from the total number of meters on-site. If whole-building aggregate data is provided from the utilities, this is often defined as one meter within ENERGY STAR Portfolio Manager.

  To view which meters are being factored into the total energy consumption of the building:
  1. Navigate to the "Energy" tab
  2. Locate the "Meter Summary" box and the "Meters - Used to Compute Metrics" table

- **Total Energy Consumption**: Confirm that the total energy consumption is accurate for each meter.

  To view the individual meter pages:
    1. Navigate to the "Energy" tab
    2. Locate the "Meters - Used to Compute Metrics" table
    3. Click into the meter name to view data entries. Confirm a full calendar year has been entered for all meters for the year you are verifying.
    4. Confirm the meters have the correct and consistent units
    5. *It is recommended that verifiers compare a building's emissions or energy use intensity with similar buildings as a way to flag possible errors in reporting data.*

- **Montgomery County Building ID**: A MBID must be entered in the Standard ID box for each building. Each building is assigned one unique MBID. To find your Montgomery County Building ID, reference the DEP Covered Building Inventory. Without entering the MBID in Portfolio Manager exactly as it appears, the property will be deemed non-compliant.

    1. Navigate to the "Details" tab.
    2. In the "Unique Identifiers (IDs)" box, click "view" next to "Standard IDs"
    3. Under "Standard ID - County/District:, verify that the MBID associated with the building is entered in the proper format.

Notify the building owner of any errors identified. The verifier should not proceed to Step 4 until errors are corrected.

STEP 4 - COMPLETE AND SIGN THE ENERGY STAR DATA VERIFICATION CHECKLIST

The signed ENERGY STAR Data Verification Checklist should be downloaded and emailed to the building owner. Advise the building owner that they must keep this signed document for their records. DEP does not collect your data verification checklist but may request it.

STEP 5 - ENTER YOUR CREDENTIAL INFORMATION INTO ENERGY STAR PORTFOLIO MANAGER

In Portfolio Manager, navigate to the Details tab of the building and scroll down to the Verification section at the bottom of the page. Populate all fields. information should include: Calendar Year of Data Verified, Date of Verification, Full Name, Title, Organization, Phone Number, Email, Postal Code, and your Professional Designation (Credential Name, Acronym, Certifying Number (if available), and State).

Note: If you possess an accepted verification credential not listed, please select Other and type in the certification name. Verification selecting "no professional designation" will not be accepted.

STEP 6 - CONFIRM THE BUILDING IS SHARED WITH MONTGOMERY COUNTY DEP IN ENERGY STAR PORTFOLIO MANAGER

The following two actions are required of all Montgomery County building owners in order to correctly share their building's energy use with the County.

- **Connect** their Portfolio Manager account with the Montgomery County's Portfolio Manager account.

- **Share** read-only access for their Montgomery County's buildings.

This process only needs to be completed one time. Once a connection has been established, there is no need for an owner to reshare their data in future years.

Please note: An owner can connect and share their data with Montgomery County at any time. They do not need to wait until their data has been verified. The County will not complete its review until the building owner submits a report in the Montgomery County Building Energy Benchmarking Reporting Portal. It's a best practice for an owner to share data as soon as possible.

To confirm that the building has been shared with the County,

1. Navigate to the "**Summary**" tab of the building.

2. Scroll down to the "**Sharing this Property**" box and confirm that the building has been shared with "MontgomeryDEP" with "Exchange Data" permissions.

If the building is not shared with Montgomery County DEP, please notify the owner. Detailed instructions for connecting with the County and sharing buildings can be found under Task 4, Submit Your Completed Report below.

TASK 3: CLAIM YOUR BUILDING(S)

The Montgomery County Building Energy Benchmarking Reporting Portal allows you to claim the buildings you are responsible for benchmarking. Once you claim your buildings, you can manage or edit contact info, file extension, exemption, or waiver requests, submit your annual benchmarking report to Montgomery County, and view your reporting status and disclosed data. To begin:

STEP 1 - CREATE AN ACCOUNT

If you are reporting through the **Montgomery County Building Energy Benchmarking Reporting Portal** for the first time, follow these instructions to create a username and password:
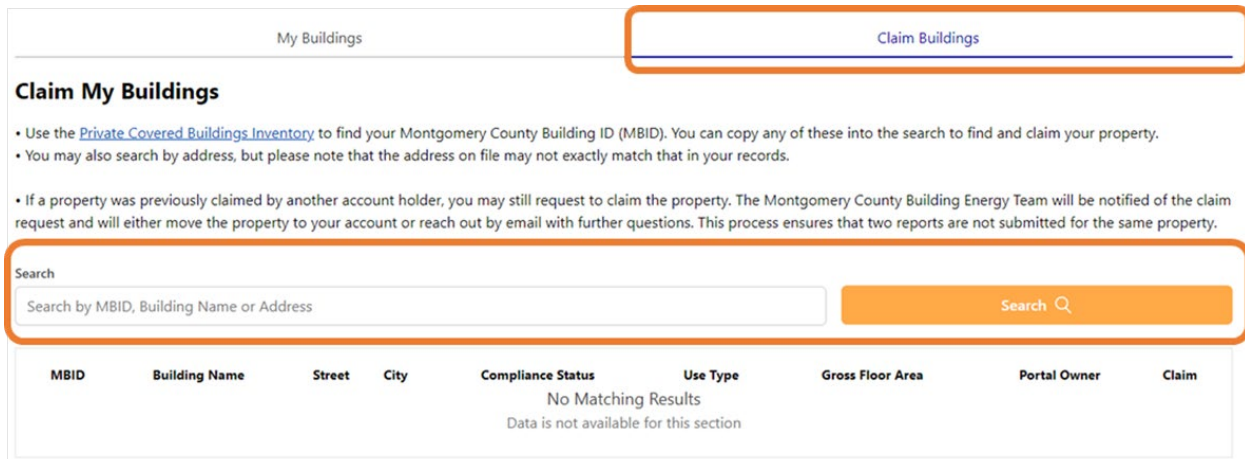
1. Navigate to the Montgomery County Building Energy Benchmarking Reporting Portal

2. Click "Sign Up" under the login fields

3. Fill out the required information. Your username will be your email address.

4. Click "Submit".

STEP 2 - CLAIM YOUR BUILDINGS

Once you have a login, you may sign in and begin claiming buildings to add them to your account. This will allow you to see all of your buildings in one place and will allow you to submit your benchmarking report for each building or submit extensions, exemptions, or waivers.

To add properties to your account:

1. Click "Claim Buildings".

2. Search the table by entering either the Montgomery County Building ID or property address. These are listed in the DEP Covered Building Inventory. *We recommend searching by Montgomery County Building ID.* When you have found your property, click 'Claim' under the 'Claim Property' column.

   a) If the property was not previously claimed, it will be added to your account.

b) If the property was previously claimed by another user, the Montgomery County DEP team will be notified of the claim request. The team will either move the property to your account or reach out by email with further questions. This process ensures that two reports are not submitted for the same property.

Please note: If you are not able to find your property, please contact Energy@MontgomeryCountyMD.gov for assistance or so that we may add your building to the covered buildings inventory or provide you with your Montgomery County Building ID.

Resources:

- DEP's **Covered Buildings Inventory**.
- **Online GIS map** created from current Maryland tax assessment records to locate the parcel that your building sits on, access tax record data, and see what other buildings share your parcel.
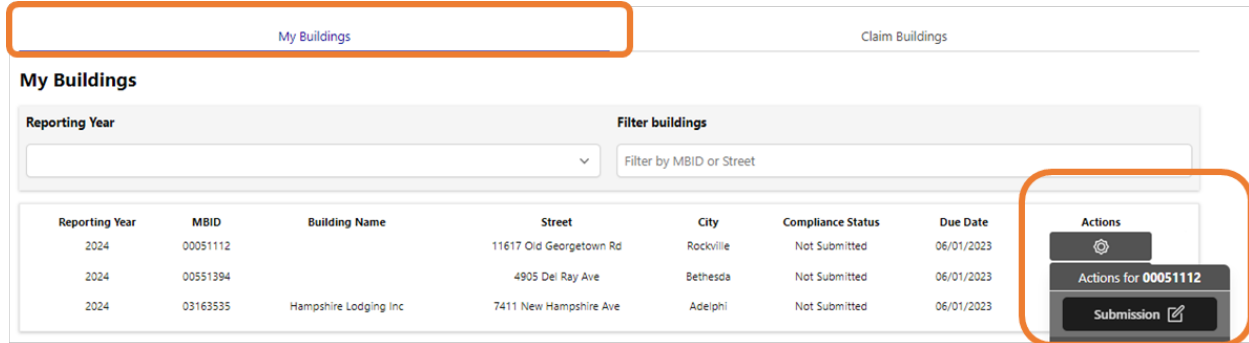
Special cases:

- If you have a submission spanning multiple tax parcels, contact us for guidance on which MBID to use in your submission.
- If you are separately reporting multiple buildings on one parcel, please refer to the Covered Buildings Inventory for each building's ID or contact DEP for guidance on which MBID to use in your submission.

TASK 4: SUBMIT YOUR COMPLETED REPORT
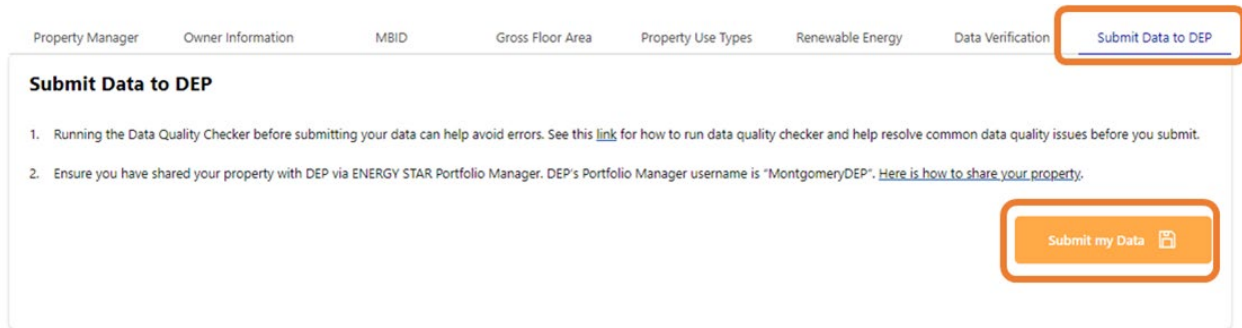
Once your data has been entered in ENERGY STAR Portfolio Manager you **must** take the final step to fill out the required forms and submit your data via the Montgomery County Building Energy Benchmarking Reporting Portal for each building. If you make any updates to the benchmarking report in ESPM, you must resubmit your report to us so that we can receive your updated version.

1. Navigate to the Montgomery County Building Energy Benchmarking Reporting Portal and log in.
2. Claim the building in the "Claim Buildings".
3. Under the "My Buildings" tab, click the gear icon in the Actions Column, and choose Submission for the building you are ready to submit.

4. The reporting portal will walk you through several tabs to confirm that all data has been properly entered.

5. Once you have answered all of the questions, click "Submit my Data".

EXTENSIONS

REQUESTING AN EXTENSION

Extensions up to 30 days beyond the June 1 deadline are available. Additional extensions may be granted to buildings with extenuating circumstances. Extenuating circumstances may include, but are not necessarily limited to:
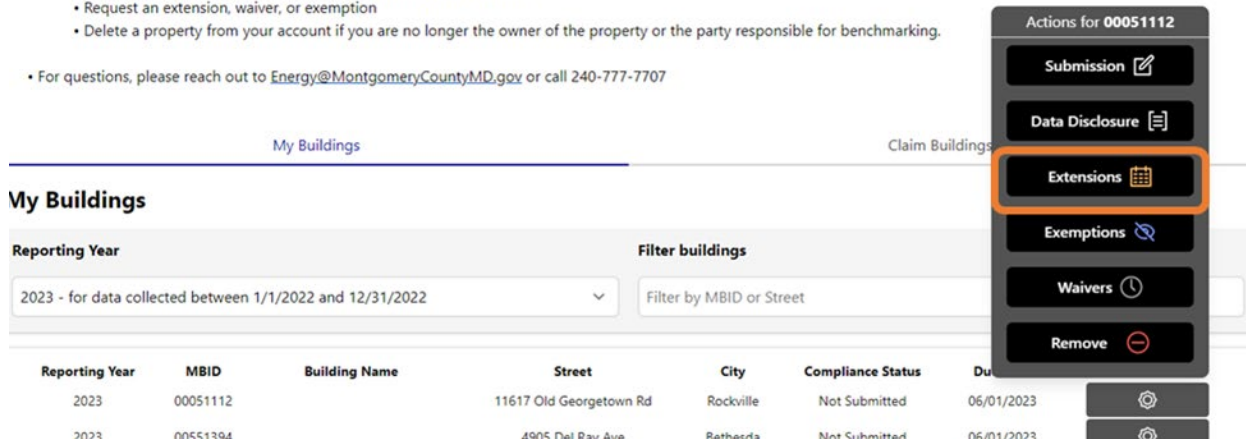
1. **Utility data delays** - Owners must provide written documentation of utility data requests and either lack of response and/or response from utility detailing reason(s) for not being able to get data in a timely manner. This will not be considered for buildings that failed to follow our How-To Guide.

2. **Third-party verification delay -** Owners must demonstrate that they have engaged a third-party verifier and that they are unable to complete the verification by the deadline.

3. **DEP delay -** Owner must provide evidence that requests were made to the DEP team and timely responses were not received.

4. **Other -** A building owner may apply for an extension for another reason, but will need to provide documentation and explanation of their situation.

EXTENSION INSTRUCTIONS FOR BUILDING OWNERS

1. Navigate to the "My Buildings" page of the Montgomery County Building Energy Benchmarking Reporting Portal. (If you have not yet created an account or claimed your buildings, see task 3)

2. Click "Extension" from the Actions column:

3. Provide the reason for extension and attach any documentation demonstrating the extenuating circumstance.

4. Click "Submit". The DEP Team will review your extension request and may follow up for more information.

EXEMPTIONS

Exemptions are available for:

1. A building that can document that it is a single building less than 25,000 gross square feet. Your building may be exempt if it contains individually owned or leased spaces where each space:
    *   Is less than 25,000 gross square feet, **and**
    *   Does not share and is not connected by any interior space (even hallways), **and**
    *   Has its own energy systems (like HVAC and hot water heating) and there are no shared energy systems between spaces, **and**
    *   Has separate energy utility meters.

2. A building for which more than 50% of the total gross floor area is used for:
    *   Public assembly in a building without walls; or,
    *   Industrial uses where the majority of energy is consumed for manufacturing, the generation of electric power or district thermal energy to be consumed offsite, or for other process loads; or,
    *   Transportation, communications, or utility infrastructure.

Exemptions are permanent and will remove the building from the covered buildings list.

EXEMPTION INSTRUCTIONS FOR BUILDING OWNERS
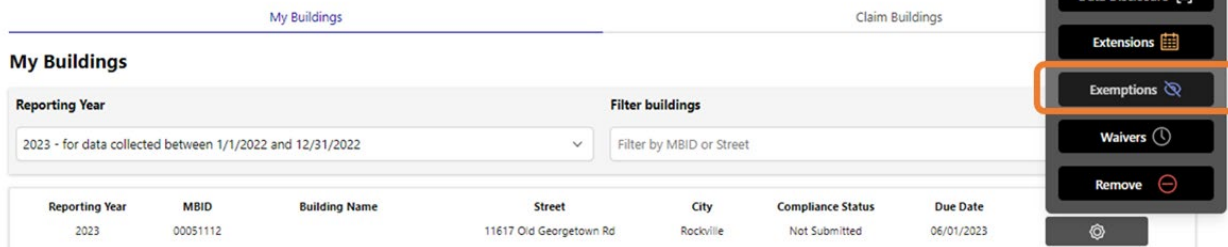
1. Navigate to the "My Buildings" page of the Montgomery County Building Energy Benchmarking Reporting Portal. (If you have not yet created an account or claimed your buildings, see Task 3)

2. Click the gear icon in the Actions Column, and choose Exemptions:

3. Select the Exemption case and upload documentation.

4. Click "Submit". The DEP Team will review your exemption request and may follow up for more information.

WAIVERS

Waivers apply to a building that:

1. Is in financial distress *(the building is the subject of a tax lien sale or public auction to property tax arrearages; is controlled by a court appointed receiver; or was recently acquired by a deed in lieu of foreclosure)*; or,
2. On average, less than one full-time-equivalent employee occupied the building during the calendar year being reported; or,
3. Is newly constructed and has received its certificate of use and occupancy during the calendar year for which benchmarking is required; or,
4. Was demolished or received its demolition permit during the calendar year for which benchmarking is required.

Waivers must be filed annually by May 1.

WAIVER INSTRUCTIONS FOR BUILDING OWNERS
1. Navigate to the "My Buildings" page of the Montgomery County Building Energy Benchmarking Reporting Portal. (If you have not yet created an account or claimed your buildings, see Task 3)

2. Click the gear icon in the Actions Column, and choose Waivers:

3. Select the Waiver case that applies for your building and upload documentation.

4. Click "Submit". The DEP Team will review your waiver request and may follow up for more information.

NEXT STEPS
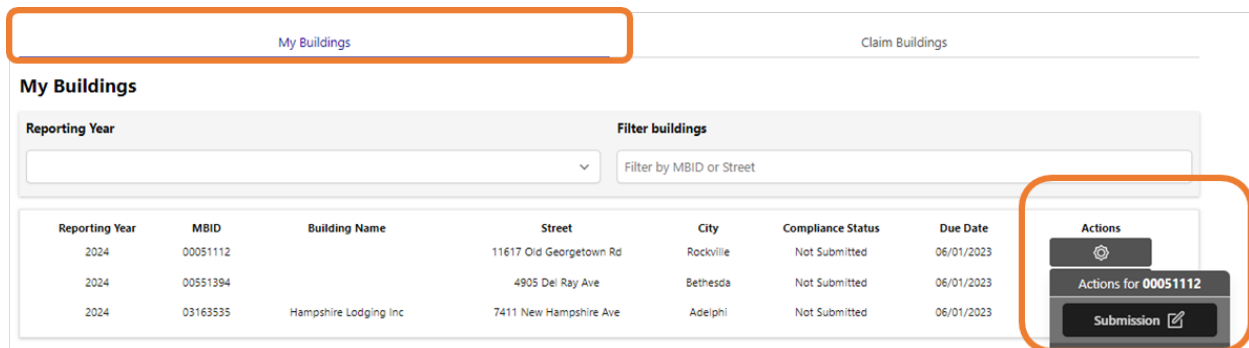
RESPONSE FROM DEP

Once you have shared your building(s) with Montgomery County through ENERGY STAR Portfolio Manager, submitted your Reporting Form, and, if necessary, verified your data, you will receive a response from DEP.

- If no further action is needed, you will receive an email from DEP confirming that each submission has been accepted.

- If your report requires further action, you will receive one of the following:

  - **Invalid Report**: The most likely reason that you would receive an alert noting that your report is invalid is that you have entered an invalid Montgomery County Building ID. The ID must be entered exactly as it appears in the Montgomery County Building Energy Benchmarking Reporting Portal and on the covered buildings inventory, including any leading zeros at the beginning or underscore and letters at the end.

  - **Pending Revisions Report**: You may receive an email that flags potential data quality issues or missing information. For your report to be considered in compliance you will need to correct those issues in ENERGY STAR Portfolio Manager and re-submit your report via the Reporting Portal. If the data flag is in error (e.g. you got a flag saying natural gas must be reported but you have an all-electric building), please email Energy@MontgomeryCountyMD.gov so that we can review your report.

If you receive a rejection email, it does not mean that your report is rejected indefinitely. If you have made any updates or corrections to your benchmarking report in ENERGY STAR Portfolio Manager, you must **RESUBMIT** your benchmarking report via the Montgomery County Building Energy Benchmarking Reporting Portal for DEP to capture your updates. To do so:

1. Navigate to the Montgomery County Building Energy Benchmarking Reporting Portal and log in.
2. Click the gear icon in the Actions Column, and choose Submission for the building you are ready to submit.

3. The reporting portal will have saved all of your previous answers and you may simply navigate to the last tab and click "Submit my Data"

If you have any questions regarding an email response that you receive, please contact Energy@MontgomeryCountyMD.gov.

DATA DISCLOSURE

The County will publicly disclose data reported. This disclosure will include basic building identification, energy metrics, and reporting compliance status. You can view your metrics from the Montgomery County Building Energy Benchmarking Reporting Portal by selecting Data Disclosure from the action menu:

ENFORCEMENT

Failure to comply with benchmarking reporting requirements will be subject to a Notice of Violation and Class A Violation.

ENERGY STAR CERTIFICATION

If your building scores an ENERGY STAR rating of over 75, you may be eligible for ENERGY STAR Certification, awarded by EPA. Buildings may be required to meet additional criteria and data quality standards. Find out more at energystar.gov/buildings/building_recognition

SHARING INFORMATION ON BUILDING ENERGY PERFORMANCE

If you would like to communicate information on building energy performance with potential tenants or other interested parties, Portfolio Manager can generate a user-friendly Statement of Energy Performance. In Portfolio Manager, click on the "Reporting" tab. On the right side, select "Statement of Energy Performance" to generate a summary PDF.

PREPARING FOR BUILDING ENERGY PERFORMANCE STANDARDS
Benchmarking is the first step in preparing for Building Energy Performance Standards (BEPS). BEPS requires covered buildings to meet long-term site energy use intensity performance standards based on each building's property type.

Learn more at https://www.montgomerycountymd.gov/green/energy/beps.html.

ADDITIONAL SUPPORT

We are committed to helping building owners collect and report their data. Please reach out to the DEP team at Energy@MontgomeryCountyMD.gov or 240-777-7707 for one-one-one assistance, support, or with questions.

Sign-up for the Commercial Energy News, a newsletter that includes all of the Benchmarking Law updates, as well as Commercial PACE financing news, green building news, and commercial energy events.

BENCHMARKING SUPPORT

For additional resources, guidance, and further information on Montgomery County benchmarking requirements, visit ***https://www.montgomerycountymd.gov/green/energy/benchmarking.html***

- While DEP cannot recommend or refer you to specific companies for benchmarking help, Montgomery County Benchmarking Ambassadors (PDF) have attended training about complying with Montgomery County's law and learned how to access data from utilities.

- The **Montgomery County Green Bank's Technical Assistance program** can connect first-time benchmarkers with vendors who can help obtain accurate gross floor area, complete energy benchmarking, verify data, and help to subsidize the costs of those services. Submit an application and someone from the TA program will get back to you.

- Help using Portfolio Manager is available at ***energystar.gov/buildings/training*** or by contacting the ENERGY STAR helpdesk.

BUILDING ENERGY PERFORMANCE STANDARDS (BEPS) SUPPORT

For more information about Montgomery County's Building Energy Performance Standards, visit https://www.montgomerycountymd.gov/dep/energy/commercial/beps.html.

- The Montgomery County Green Bank's **Technical Assistance program** can help defray costs of energy audits, electrification feasibility studies, EV charger studies, and renewable energy feasibility studies. Submit an application at https://mcgreenbank.org/technical-assistance-program-application-form/ and someone from the TA program will get back to you.

- A DEP engineer can also provide a **free site visit** to help get you started. Learn more and schedule a BEPS Site Visit.

FAQ

IS THERE A COST TO FILE BENCHMARKING REPORT?

There is no cost with filing your benchmarking report (or for our help). There is one element to benchmarking that you may need to outsource if your company doesn't have a Recognized Data Verifier. The first year that a building reports and every 3 years thereafter, someone with a "recognized verification credential" must review and sign-off on your submission. They will review for accuracy in what's reported (building gross floor area, that all energy data has been reported, etc).

I SOLD/BOUGHT MY PROPERTY LAST YEAR. WHO SHOULD REPORT TO DEP?

The new owner will need to report, but per the law the seller must transfer the following records to the prospective buyer:

A. the benchmarking property record from the benchmarking tool; (instructions to transfer properties in ENERGY STAR Portfolio Manager)
B. documentation of data verification; and
C. any other related records relevant to maintain compliance.

These other records may include copies of utility bills for the period during which the seller owned the building that the new owner needs to complete benchmarking, access to utility data aggregation sites, etc.

WHAT IF I PURCHASED THE BUILDING IN THE PAST YEAR?

Buildings that have transferred ownership are **not** exempt from reporting requirements. If a Building changes ownership, any outstanding compliance obligations and liabilities shall become the responsibility of the new Building Owner. Whoever owns the building as of the deadline for compliance with reporting requirements is responsible for submitting the report.

To help the new owner comply when a building changes ownership, per the law, the previous Owner shall provide to the new Owner any required data that has been collected and is necessary for completing the next required reporting.

Additionally, utilities may be able to provide historical aggregated data to cover the prior calendar year.

WHICH PROPERTY USES SHOULD I SELECT TO REPRESENT MY BUILDING?

Portfolio Manager has approximately 80 different property use categories. You should accurately represent all uses that are found within your building. A list of definitions is available here.

EPA has additional guidance on some examples of what property use types to select: https://portfoliomanagerhelp.zendesk.com/hc/en-us/articles/30185852969755-Which-property-type-should-I-use-for

HOW DO I DETERMINE THE GROSS FLOOR AREA FOR A PROPERTY USE WITHIN THE BUILDING?

Gross floor area is measured as the space between the exterior surfaces of the building's enclosing fixed walls, subject to the inclusions and exclusions below.

- **INCLUDE** tenant areas, common areas, meeting areas, restrooms, elevator shafts, stairways, basement space, mechanical equipment areas, and storage rooms.
- **EXCLUDE** all parking areas, exterior loading docks, exterior balconies, driveways, unroofed light wells, and plenums between floors.

Building owners may have information on gross floor area from leasing, sale, or other transactional documents or may need to measure GFA from building drawings according to the Portfolio Manager definition.

HOW CAN WE VERIFY GROSS FLOOR AREA?

An accurate gross floor area measurement is critical to benchmarking as that dictates the key energy metrics like site energy use intensity. A few sources for data that may help:
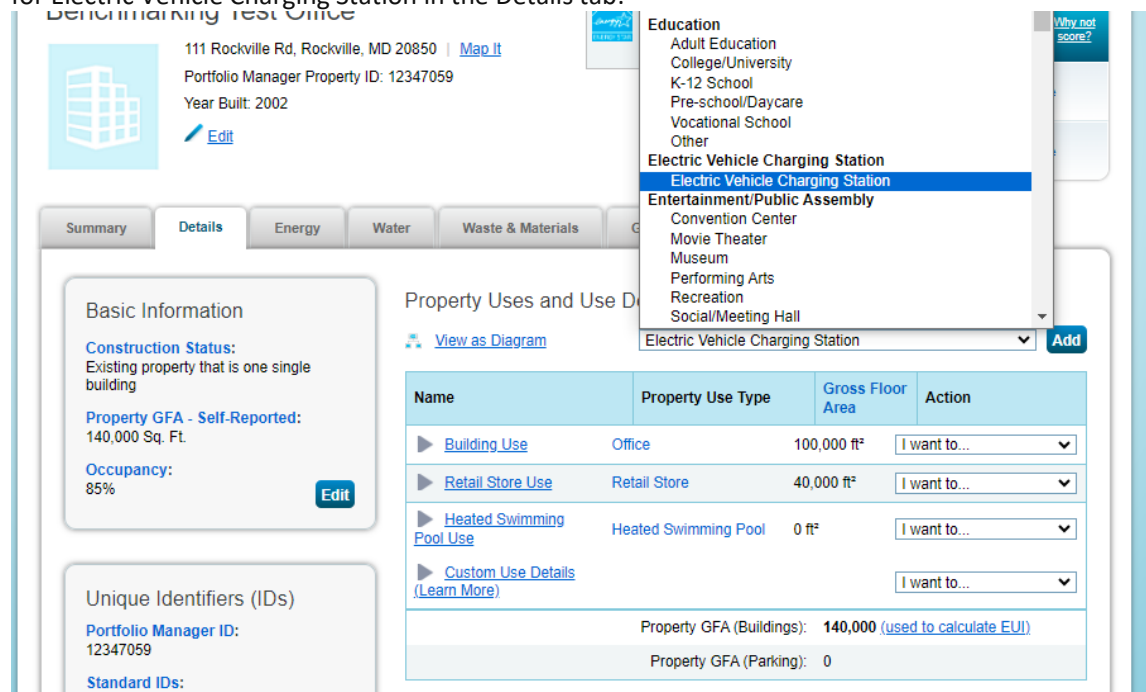
- SDAT real property look-up tool: https://sdat.dat.maryland.gov/RealProperty/Pages/default.aspx
- The plat/survey document for the property: https://guide.msa.maryland.gov/pages/viewer.aspx?page=plats-records (note you'll need the plat # from SDAT)
- If neither of these two options are available, a site visit and physical measurements may be necessary. The Green Bank Technical Assistance program may be able to connect you to a vendor to assist with GFA measurements and subsidize the cost of doing so.

ARE THERE ANY ENERGY USES THAT ARE NOT PART OF MY BUILDING'S ENERGY USE?

Cell phone towers, radio masts, and any external billboards used for leased advertising space as well as electric vehicle chargers are not part of building energy use, and may be excluded if separately metered..

For **electric vehicle charging**, EPA's How do I benchmark my EV Charging Station? page provides helpful guidance. If the EV chargers are on a separate meter, omit that meter from benchmarking. If the EVs are on the building meter but submetered, you may deduct the EV consumption by adding a negative meter in Portfolio Manager.

If the EVs are part of the main meter and not submetered, EPA is working on an EV charging adjustment based on the number and type of EV charging stations present. If this case applies, add a new Property Type for Electric Vehicle Charging Station in the Details tab:

Enter the number of each type of EV charger included in your building's benchmarking report and the date that they were installed:

Name: * Electric Vehicle Charging St

Property Use Detail	Value		Current As Of	Temporary Value
Number of Level One EV Charging Stations		☐ Use a default	1/1/2002 🗓	☐
Number of Level Two EV Charging Stations		☐ Use a default	1/1/2002 🗓	☐
Number of DC Fast EV Charging Stations		☐ Use a default	1/1/2002 🗓	☐

Save Use   Cancel

This will allow DEP to deduct your building's estimated EV consumption from the building's site energy use.

HOW ARE DATA CENTERS REPORTED IN PORTFOLIO MANAGER?
Portfolio Manager defines a data center as a space "specifically designed and equipped to meet the needs of high density computing equipment such as server racks." You can add a data center as a property use type.

WHAT IF THE BUILDING IS UNDER CONSTRUCTION OR NEWLY BUILT?
A newly constructed building, if it meets the threshold for being covered by this ordinance, is required to report its energy use and complete verification for the first full calendar year after it becomes occupied.

HOW CAN I FIND A DATA VERIFIER?
While DEP cannot suggest a specific company, Montgomery County Benchmarking Ambassadors (PDF) have attended training about complying with Montgomery County's law and learned how to access data from utilities.

The **Montgomery County Green Bank's Technical Assistance program** can connect benchmarkers with vendors who can help obtain accurate gross floor area, complete energy benchmarking, and verify data. The Green Bank may be able to subsidize costs for these services.

IS THE SAME PERSON ABLE TO COMPLETE REPORTING ON BEHALF OF AN OWNER AND COMPLETE VERIFICATION FOR THE SAME PROPERTY?
Yes, as long as the reporter holds a valid Data Verification Credential verification in Montgomery County need not be done by a 3rd party.

WHAT IF SOMEONE LEFT THE COMPANY AND WE DO NOT HAVE ACCESS TO ESPM ACCOUNT?
Unfortunately DEP does not have access to your Portfolio Manager credentials. In some cases, DEP may be able to share the building with you (depending on how the building was shared with DEP) or be able to provide the username and email on the existing account to help facilitate a helpdesk ticket to EPA. You could create a new account for yourself and then request that those buildings be transferred to you. Here's more information:
- Someone left my company, how can I get access to their buildings in Portfolio Manager?

Additional guidance on transferring properties in ESPM:
- How do I transfer properties to another user?

HOW DO I REPORT IF THERE ARE MULTIPLE BUILDINGS WITHIN THE PARCEL?

If there are multiple buildings at the property, all larger than 25,000 gross square feet and all separately metered for all energy utilities with separate systems (e.g. no central heating/DHW), they should be reported as individual buildings.

If the community shares a master meter or system (like heating or DHW) for any utility, you'll need to report the gross floor area for any structures being served by those utilities (even if some are <25k gross square feet).

Feel free to reach out to DEP at Energy@MontgomeryCountyMD.gov or 240-777-7707 if you need MBIDs or are unsure of how to report.

HOW DO I SHARE THE NEWLY ADDED METERS AFTER SHARING MY PROFILE?

Please note that if you ADD new meters to your property, you will also need to share those with MontgomeryDEP. ENERGY STAR Portfolio Manager will prompt you to share any new meters with existing connections:

COMMON BENCHMARKING ISSUES

Missing MBID number

The Montgomery County Building ID field in your benchmarking report was blank.

The Montgomery County Building ID (MBID) is your building's unique identification number. DEP's Covered Buildings Inventory lists the MBID for each covered building.

For buildings that do not share a tax parcel with any other buildings, the MBID is the 8-digit Parcel Identification Number/Tax ID. The Parcel ID number is located in the upper right corner of your property tax bill. It would be the same as your account number. You can locate this number online by visiting the Department of Finance's Real Property Tax Account Information website. You can also use the online GIS map created from current Maryland tax assessment records to locate the parcel that your building sits on, and see what other buildings share your parcel.

For buildings that share a tax parcel with other buildings, the MBID is the 8-digit Parcel Identification Number/Tax ID plus a letter at the end. For example 01234567_A, 01234567_B.

Instructions to enter MBID can be found here.

Incorrect MBID number

The Montgomery County Building ID that entered into your Portfolio Manager does not match DEP's Covered Buildings List. The Montgomery County Building ID (MBID) is your building's unique identification number. DEP's Covered Buildings Inventory lists the MBID for each covered building.

Update this MBID number in Portfolio Manager—Under the Details tab, select "Montgomery County (MD) Building ID" from the "Standard IDs" drop-down menu, and enter your MBID. View helpful screenshot to help you Update Your MBID (PDF, 497KB).

If you need help determining your MBID, please contact us.

Missing data verification details

The Benchmarking Law requires that building owners complete a verification process the first year of compliance and every 3 years after. Your benchmarking report was not accepted due to:

- Recognized Data Verifier credentials were not entered/updated into the Verification fields on the Details tab in Portfolio Manager.

  -OR-
- Your property did not report achieving the ENERGY STAR building certification for at least 6 months of the calendar year being benchmarked.

Instructions on completing verification, a list of acceptable Recognized Data Verifier credentials, and how to enter Recognized Data Verifier credentials in Portfolio Manager is available in Task 2, Complete Data Verification above**.**

After verification is completed, please visit your property in Portfolio Manager and enter either verifier information into the fields provided on the Details tab in Portfolio Manager. Instructions and screenshots for doing so are here.

Missing property use information

Your benchmarking report will not be accepted if it contains the following alert messages:
- Alert - Property has no uses
- Alert - Gross Floor Area is 0 ft2

To fix these errors, you'll need to enter a Gross Floor Area figure for your entire building in Portfolio Manager and select use types (e.g., office, retail) for your property on the Details tab. Make sure the sum of gross floor area figures for each property use type equals the gross floor area for the entire property.

Missing 12 full months of energy data

Your benchmarking report will not be accepted if it has less than 12 full months of energy data for the year being benchmarked. If this occurs, your benchmarking report will reflect "Not Available" for all energy data metrics (e.g., Site EUI, Source EUI, Electricity Use).

Your energy bills must cover January 1 through December 31 of the calendar year being benchmarked, and you may need to enter your prior December or following January invoices to capture the full 12 months of calendar year data required for a complete benchmarking report.

Missing whole building data

If you received an alert stating that Metered Areas (Energy) do not reflect whole-building data, then your meter configuration may not be capturing all energy use in your building. Reporting energy data for portions of your building (i.e., only common space or house meters) means your benchmarking report is incomplete. You may need to change a setting on the Meters tab to indicate that all meters reported represent all energy used by the building OR collect/report additional energy meter information for your building such as tenant energy use. More information on how to select meters to be included in your metrics is available here.

Energy meters are not included in the report

If you receive an alert that no energy meters are included in the benchmarking report, then you may need to add energy meters (if none exist) or associate existing energy meters to your property. On the Meters tab of your Portfolio Manager record, you can add a meter or change meter selections. Additional instructions are available from the **Portfolio Manager help section**.

Energy meters have gaps or overlaps

If meter read dates have **gaps** in your energy data, that means at least one day in the calendar year is missing. This could indicate that energy data are not included in your benchmarking report. Instructions on how to fix gaps are available from the **Portfolio Manager help section**.

If meter read dates **overlap** in your energy data, that means the same day(s) within the calendar year are included in your benchmarking report. This could indicate duplicate energy data being reported. Instructions on how to fix overlaps are available from the **Portfolio Manager help section**.

Energy meters have a single entry that is more than 65 days long

If your benchmarking report contains an alert that one or more energy bill meter read dates is longer than 65 days, then weather-normalized data cannot be calculated. Please ensure you have entered each monthly utility bill separately or manually revise these utility bill meter read dates to be less than 65 days. More information from the **Portfolio Manager help section**.

Energy data is estimated

While Portfolio Manager allows building owners to use data estimates in their property record during the data collection phase of benchmarking, estimated data are not permitted in benchmarking report submissions. If the value you are entering comes directly from your utility bill, you do not need to check estimated, even though some utility bills may contain small estimates based on how they read your meter.

Before reporting annual benchmarking data to DEP, replace any estimations with actual data. Recognized data verifiers should not sign off on the Data Verification Checklist with estimated data unless there are extenuating circumstances, such as an energy meter malfunction.

Weather-normalized data are not available

Weather-normalized data may not be available for a number of factors, the most common being utility bill meter read dates being longer than 65 days or receiving too few fuel deliveries over 24 months.

If you are able to get a site and source EUI figure, but Portfolio Manager is not able to calculate weather-normalized site and source EUI, please try to manually revise these utility bill meter read dates to be less than 65 days. If that fixes the problem, great! Just generate a new report and resubmit it to DEP.

If that does not fix the problem, please email **energy@montgomerycountymd.gov** and let us know if there's another reason weather-normalized data is unavailable. DEP requires this data point in your benchmarking report, but if Portfolio Manager is not able to calculate it for a valid reason, we will accept a report without weather-normalized data.

An ENERGY STAR score is not included in your benchmarking report

If your **property type is able to earn an ENERGY STAR score** but your benchmarking report does not contain a score, DEP will request additional information from the building owner to explain this discrepancy.

Building is not covered under the Law

Based on the current Benchmarking Law requirements, you may have submitted a benchmarking report for a building that isn't covered under the Law. This may be because your building type is exempt from reporting, your building is not yet due to report, or your building is located in a jurisdiction that has not opted into the County's Benchmarking Law.

DEP is happy to accept your benchmarking reports each year, but you will not be required to report unless your jurisdiction opts into the Law or your building type becomes covered under the Law. Your data will not be included in the disclosed metrics. If you want to report a voluntary submission, please reach out to DEP so that we can create a Montgomery County Building ID (MBID) for you.