Montgomery County Benchmarking Portal

User Guide

Montgomery County Benchmarking Portal

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MONTGOMERY COUNTY BENCHMARKING PORTAL USER GUIDE

Purpose

This User Guide explains how to use the **Montgomery County Benchmarking Portal** (the **Benchmarking Portal**) to manage your buildings and complete required benchmarking tasks, including claiming buildings, reviewing data quality alerts, and submitting forms.

Table of Contents

1.0 System Functionality

The Montgomery County Benchmarking Portal (the Benchmarking Portal) is an online tool for building owners and managers. It helps you manage your buildings, collaborate with your team, review data alerts, and submit benchmarking forms, while also providing a clear view of compliance status and deadlines.

2.0 Account Management and Collaboration

This section explains how to create and manage your Benchmarking Portal account. You will learn how to register and sign in, update account details, invite team members, and manage roles and permissions so the right people have access to the right buildings.

Account settings control your organization's access and permissions. Profile settings are specific to you as an individual user.

2.1 Registration

The Benchmarking Portal can be accessed in an online web browser at mcenergybenchmarking.org. To create a new account, select **Register** on the sign-in page and enter the required account holder information. During registration, you can also invite team members, if needed.

To register:
1. Open the Benchmarking Portal sign-in page.
2. Select **Register**.
3. Enter your account information and follow the on-screen prompts to complete setup.
4. (Optional) Invite team members.

Key Terms
- **Account**: The organization or team workspace in the Benchmarking Portal.
- **Member**: A person added to an account.
- **Role/Permissions**: What a member can see and do in the Benchmarking Portal.
- **Building access**: Which buildings a member can view and manage.

Existing Users from Previous Portal

The Benchmarking Portal replaces the County's previous benchmarking reporting tool. If you had an account in the previous portal, you do **not** need to register again. Use your existing login information to sign in. Buildings you previously claimed will already appear in your account's **Benchmark My Buildings** page. If you cannot sign in, use the Forgot your password? link to reset your password.
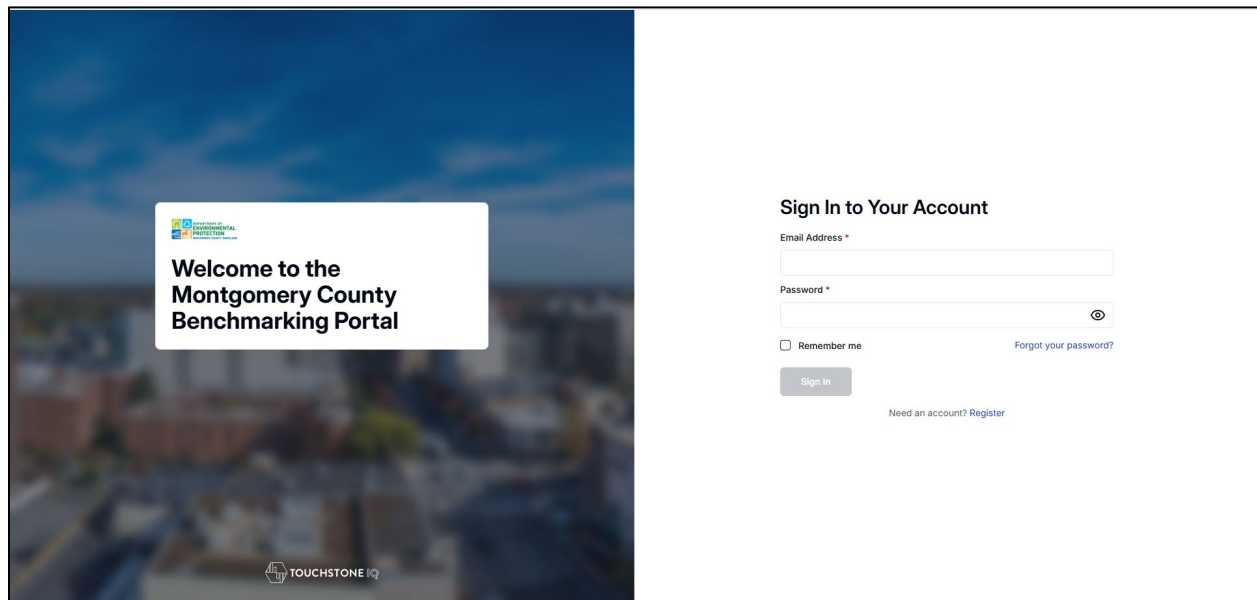
Note: If your organization manages multiple properties, create one primary organization account to claim and manage all buildings. The account administrator can invite staff or consultants, assign the appropriate roles, and grant or remove building access as responsibilities change.

2.2 Returning Users

Returning users can sign in using their registered email address and password, then select Sign In.

If you previously used the County's earlier benchmarking portal, sign in using your existing login information. Your claimed buildings will appear in your account's Benchmark My Buildings page.

## 2.3 Accounts and Switching Accounts

In the **Benchmarking Portal**, you may be a member of more than one account. For example, you may be invited to join another organization's account, or you may choose to create multiple accounts to manage separate building portfolios. The account you are currently working in is called the **active account**. The name of this account is displayed in the upper left of the screen. The buildings and forms you see in the Portal are based on the active account.

To switch accounts:
1. Select the **Account Name** in the **upper left** of the screen.
2. Review the account shown as active and any other accounts you are a member of.
3. Select an account to switch. The Portal will refresh and display the buildings and information for the selected account.

You can also view a full list of your accounts in **Profile > My Accounts**.

If you do not see a building you expected, confirm you are in the correct active account.
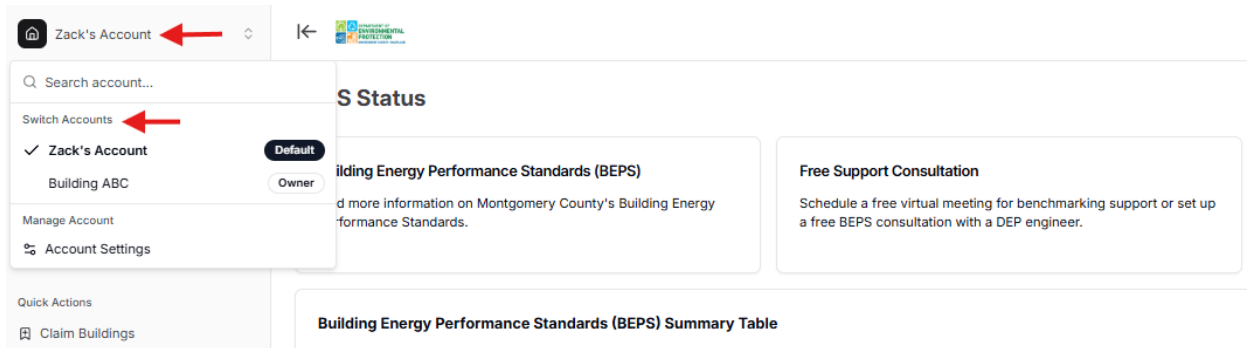
2.4 Account Settings

Use **Account Settings** to manage the **active account** in the **Benchmarking Portal**, including account information, members, roles, and building access. Before making changes, confirm you are in the correct active account (see Section 2.3).

To open Account Settings, click on the account name displayed in the top left corner of the screen and choose "Account Settings."

In Account Settings, you can:
- Update your **Account Information** (organization name and affiliation)
- Manage **Members & Permissions** (invite members, assign roles, and control access)
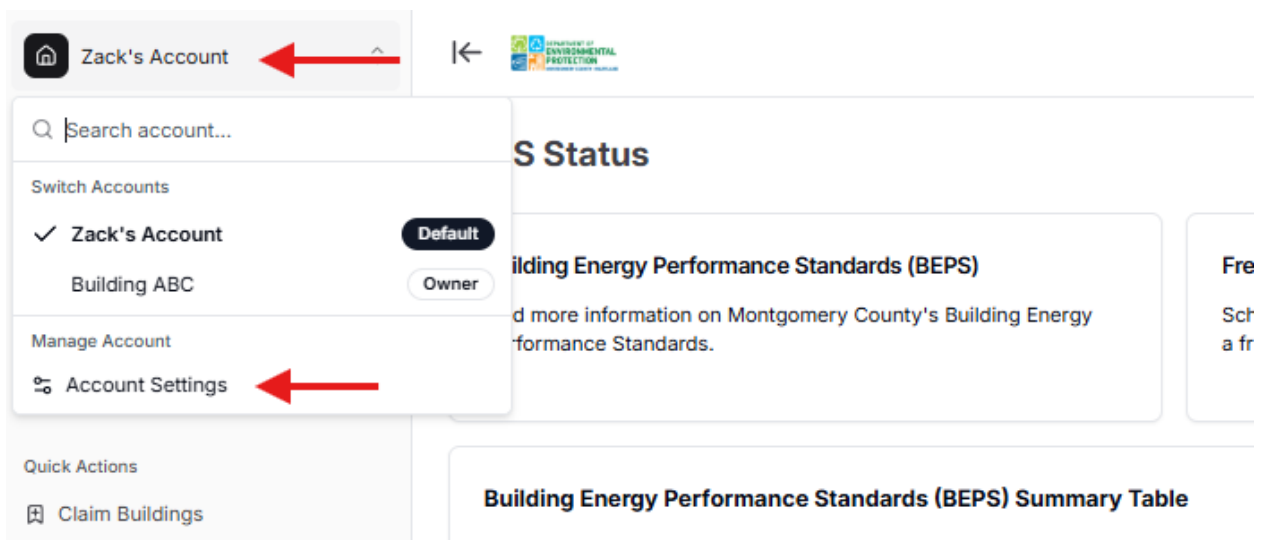
2.4.1 Account Information

Use **Account Information** to view details for the **active account**, including the account name and affiliation.

Only the Account Owner (the user who created the account) **can edit account information.** If you are not the Account Owner, you may be able to view this page but you will not be able to make changes.

- **Account Name:** The name of your organization or team in the Benchmarking Portal.
- **Affiliation:** Your relationship to the buildings you manage through this account (for example: Building Owner, Property Manager, or Reporting Consultant).

2.4.2 Members and Permissions

Use **Members & Permissions** to view the members of the **active account** and their access levels. This tab shows who is on the account and what role each member has.

Account Admins can edit member roles. **Only the Account Owner can remove members** from the account. Other roles can view members but cannot make changes.

If you need to add a new member or change access and you do not have permission, contact your **Account Owner** or an **Account Admin**.

For instructions on inviting new members or re-sending outstanding invitations, see the **Invitations** section.

Account Level Roles

Name of Building User Role	Permissions	Restrictions
Account Admin	• Automatic access to all current and future claimed buildings • Full admin rights over buildings and submissions • Can unclaim and approve building transfers • Can access and manage benchmarking submissions • Can add or edit members and update account settings	• Cannot edit/remove the account • Cannot remove members
Account Member	• Automatically added to all current and future claimed buildings • No account management access • No member management • Can access and manage benchmarking submissions	• No account management access • No member management • Cannot create new properties or claim buildings
Account Viewer	• Automatically added with view-only access to all current and future claimed buildings • Can view reports and building information	• Cannot edit/remove the account • Cannot remove members

Building Level Roles

Name of Building User Role	Permissions	Restrictions
Building Member	• Full building-level access • Edit building details • Manage forms (submit, edit, request verification)	• Cannot approve transfers
Building Viewer	• Read-only access to building data	• No editing of building records

2.4.2 Invitations

Use the **Invitations** tab to manage account invitations in the **active account**. From this tab, you can invite new members and manage invitations that have not yet been accepted.

Account Admins and the **Account Owner** can send invitations and re-send outstanding invitations.

Only the Account Owner can remove members from the account (see Section 2.4.1 Members & Permissions).

To invite a new member:
1. Select **Invite Member**.
2. Select the member's **Affiliation** and **Role**.
3. Enter the member's email address.
4. Click **Invite Member** to send the invitation.

To manage a pending invitation:
- Use the **Action** menu (three dots) to **re-send** an invitation (for example, if the invitation email was not received).
- If an invitation was sent to the wrong email address, cancel the invitation by clicking **Delete** and send a new one to the correct address.

Invited users must accept the invitation before they can access the account.

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Account Settings > Invite Account Member

Invite Account Member

Invite Member to Account: Zack's Account

Please provide:
- The affiliation the individual has with the building(s).
- The role of the individual.
- The email address of the individual you wish to invite to this account.

The Account Role selected determines the access and permissions granted to this individual within the account. Use the drawer below to review how each role behaves within the platform.

[Account and Building User Roles]

Once the invitation is sent, the member will receive an email to accept the invitation.

Affiliation with the Building(s) *

[Select Affiliation   ⌄]

Account Role *

[Select Role   ⌄]

Email *

[Who should we send this invitation to?   ]

[**Invite Member**]

2.5 Profile Details

Use **Profile** to manage your individual user settings, such as your contact information, password, and security settings. Profile settings apply to you as a user and are separate from **Account settings** (which apply to the active account).

To open your Profile, select your name in the **lower left** corner of the screen, then select **Profile**.

2.5.1 View and Edit Profile Info

In the **Profile Info** tab, you can update your user information, including your name, email address, phone number, company name, mailing address, and credentials or documentation (if applicable). You can also update your password and manage **Two-Factor Authentication** settings.

2.5.2 Manage My Accounts

Select **My Accounts** to view the accounts where you are a member. This page lists each account's name, owner, and your role and affiliation. In the **Actions** column, select **Go to Account** to switch to that account. Note: You can also switch accounts by selecting the **Account Name** in the upper left of the screen (see Section 2.3).

To create a new account, select **Create Account**. You will be taken to the **Create Account** page, where you will enter an **Account Name** and select your **Affiliation** with the account. After you create the account, you will be the **Account Owner**.

2.5.3 Pending Invitations

Select **Pending Invitations** to view invitations you have received to join other accounts. This page shows who sent the invitation, the role and account affiliation, and the date sent.

Use the available actions to respond to the invitation. After you accept an invitation, the account will appear in **Profile > My Accounts**, and you can switch to it using **Go to Account** or by selecting the **Account Name** in the upper left of the screen (see Section 2.3).

3.0 My Buildings Page

My Buildings is the default page after you sign in to the **Montgomery County Benchmarking Portal** (the **Benchmarking Portal**). This page lists the buildings associated with the active account and provides access to building details, compliance actions, and forms.

3.1 Buildings Overview

Select **My Buildings** in the left navigation menu to view a table of buildings associated with your active account. Use **Search**, **Columns**, and **Filters** to find buildings or narrow the table. Select **Clear filters** to reset the view.

3.1.1 Building Page Navigation

Select a building's **Building ID to open its** Building Summary page.

3.1.2 My Buildings Columns

View the following information for all buildings:

- **MBID** (the building's Building ID)
- **Building Name**
- **Address**
- **ESPM Property ID**
- **ESPM Connection**
  - **Connected**: The building's ENERGY STAR® Portfolio Manager® account is connected to Mongomery County's Portfolio Manager account.
  - **Disconnected**: The building's ENERGY STAR Portfolio Manager account was connected to Montgomery County's Portfolio Manager account in the past but has been disconnected.
  - **Never Connected:** The building's ENERGY STAR Portfolio Manager account has never been connected to Montgomery County's Portfolio Manager account.
- **Data Verification Due By:** Reporting year by which the building's benchmarking data must be verified.
- **Benchmarking Status**
  - See Section 3.1.3 for more information.
- **Benchmarking Deadline**
- **Alerts and Flags:** Displays the number of questions identified during review of the building's benchmarking report.
- **Submit:** Click to be taken to the benchmarking submission form.
- **Actions**
  - **Request** an Extension, Waiver, or Exemption
  - **Click Remove** to remove the building from the account.

3.1.3 Benchmarking Status

Real-time feedback regarding a building's benchmarking compliance status can be viewed to determine the status of compliance.

- **Not Submitted:** Indicates a benchmarking report has not yet been submitted for that Reporting Year.
- **In Compliance:** Indicates an error free report was submitted for that Reporting Year. No further action is required until the next reporting year.
- **Pending Revisions:** Indicates action is required to resolve errors for the report submitted. View actions by clicking on the number in Alerts and Flags column of the dashboard. Update and resubmit the benchmarking report or connect with the Help Desk for further assistance.
- **Exempt**: Indicates a benchmarking exemption request has been approved and the building does not need to submit a report for that Reporting Year.
- **Waived**: Indicates a benchmarking waiver request has been approved and the building does not need to submit a report for that Reporting Year.

You will also receive an email notification detailing the status of your submission. If your report is marked as Pending Revisions, the email will list the specific data quality flags and revisions required with instructions on how to complete. All necessary data corrections must be made in ENERGY STAR Portfolio Manager and once completed, a new benchmarking submission form must be completed in the benchmarking portal.

3.2 Individual Building Page

The **Building Summary** tab contains two tabs labeled **Building Summary** and **Historical Submission Information**.

3.2.1 Building Summary Tab

View the following information:
- **Building Information**
  - Building Name
  - Address
  - Square Footage
  - Largest Property Uses
  - Benchmarking Group
- **Energy Star Portfolio Manager Connection Status**
  - Connection Status (Connected, Disconnected, Never Connected)
  - Date Connected
  - Portfolio Manager Property ID
- **Benchmarking Compliance Status**
  - Latest Benchmarking Status
  - Last Submission Date
  - Data Verification Due Date
- **Montgomery County Performance Standard**
  - View Standard Targets for NN (Normalized Net) Site EUI, timelines for Interim and Final Standards, and whether the building's current performance meets the standards.

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Building 036[REDACTED] Summary

Building Summary   Historical Submission Information

🏢 Building Information

Building Name
[REDACTED] Md

Address
40[REDACTED] MD

Square Footage
127,803 SqFt

Largest Property Uses
1st: Self-Storage Facility
2nd: N/A
3rd: N/A

Benchmarking Group
Group 3

🌐 ENERGY STAR® Portfolio Manager® Connection Status

Connection Status: Connected

Date Connected: Unknown

Portfolio Manager Property ID: [REDACTED]

🕐 Benchmarking Compliance Status

Latest Benchmarking Status
In Compliance

Last Submission: 06/02/2025

Data Verification Due
Not Due Until 2028

📊 Montgomery County Performance Standard ⓘ
Find more details on the BEPS Status summary page.
Building Performance Improvement Plan: No

Target Timeline	NN Site EUI	Reporting Year	Measurement Period	Status
Baseline	2.7	2023 - 2025	Jan 1, 2023 – Dec 31, 2025	–
Latest Performance	2.5	2025	Jan 1 – Dec 31, 2024	–

3.2.2 Historical Submission Information

The **Historical Submission Information tab** contains a list of submissions by year in table format.
View data for the following fields:
- o Reporting Year
- o Benchmarking Status
- o Reporting Date
- o Submitted By
- o Building Gross Floor Area (ft^2)
- o Electricity Use (kwh)
- o Natural Gas Use (kBtu)
- o Weather Normalized Site Energy Use (kBtu)
- o Renewable Energy Allowance (kBtu)
- o Parking Energy Use (kBtu)
- o EV Charging Energy Use (kBtu)
- o Normalized Net Site EUI (kBtu/ft^2)

Building 99999999 Summary

Building Summary   Historical Submission Information

⟳ Historical Submission Info ⓘ

A list of Submissions for this Building by Year.

Reporting Year	Benchmarking Status	Reporting Date	Submitted By	Building Gross Floor Area (ft²)	Electricity Use (kwh)	Natural Gas Use (kBtu)	Weather Normalized Site Energy Use (kBtu)	Renewable Energy Allowance (kBtu)	Parking Energy Use (kBtu)	EV Charging Energy Use (kBtu)	Normalized Net Site EUI (kBtu/ft²)
2024	In Compliance	10/09/2025	Zack Hart	175000	300	284,345.1	285607.6	167.19486	0	0	1.6
2023	Pending Revisions	01/28/2024		100000	NaN	Not Available	Not Available	0	0	0	
2022	Pending Revisions	02/13/2022	Touchstone IQ LLC Web Services Division	100000	1,199,999.6	600,000	4694399.1	0	0	0	

Showing 1 - 3 of 3 row(s)

4.0 Dashboard

The In the left navigation menu, this page is labeled **Dashboard**. When you open it, the page title displays as **BEPS Status**. Use **BEPS Status** to view whether your building is covered by BEPS and to review BEPS status information and related resources.
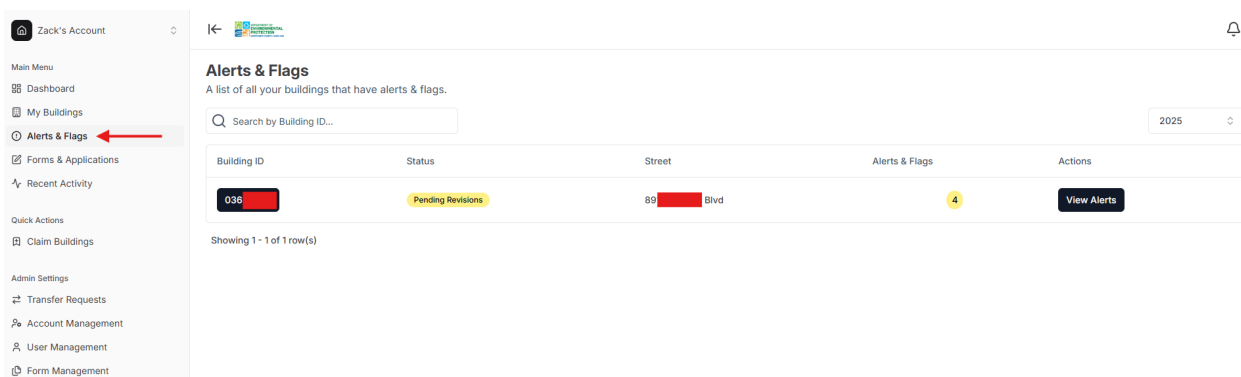

4.1 BEPS Status

The **BEPS Status** page provides a summary view of BEPS coverage and status for buildings associated with your account. Use this page to identify which buildings are subject to BEPS and to access related guidance and resources.

5.0 Alerts & Flags

Select **Alerts & Flags** in the left navigation menu to view buildings with active data quality alerts. Alerts are data quality issues identified during review of the building's benchmarking report that require action to resolve for benchmarking compliance.

Use **Search** and available filters to find a building. In the table, use the **Action** column to open the building's alert details.

5.1 View Alerts Page and Resolving Alerts

On the **Alerts & Flags** page, select **View Alerts** for a building to open the **Active Alerts** page. The Active Alerts page lists each alert with a description and available actions.

To resolve an alert, open the **Action** menu (three dots) for the alert and follow the on-screen instructions. Depending on the alert, you may need to:

- Correct data in **ENERGY STAR Portfolio Manager**, then return to the Benchmarking Portal, or
- Review full alert details in the Portal, or
- Contact the Montgomery County Help Desk at Energy@MontgomeryCountyMD.gov

Active Alerts & Flags

Review and resolve the following issues for Building ████████████████.

Alert Name	Reporting Year	Submission Date	Description	Actions
Data Verification is Due	2025	03/28/2025	Period Ending Date for Year Verified is more than 3 years from last verification year or if data verification year is N/A	...
Drastic Change in Gross Floor Area	2025	03/28/2025	Change in GFA from previous year is greater than 5%.	...
Year Verified Does Not Match Year Being Reported	2025	03/28/2025	If a building is due for data verification and the building's submission includes data verification information, then the year recorded in the "Period Ending Date for Year Verified" field should equal the submission's Reporting Year minus 1.	...
Data Verifier Credentials Missing	2025	03/28/2025	Verifier credentials are missing	...

Showing 1 - 4 of 4 row(s)

6.0 Forms & Applications – Submitted and In Progress Forms

Select **Forms & Applications** in the left navigation menu to review forms that have already been started or submitted in the **Montgomery County Benchmarking Portal** (the **Benchmarking Portal**).

From this page, you can:
- View submitted forms and their status, and
- Continue editing forms that are **In progress**, then submit them when ready.

You do not start new forms from this page. To begin a new submission or request, use the **My Buildings** page:
- **Benchmarking submission:** On **My Buildings**, select **Submit Data** for the building.
- **Extension, Waiver, or Exemption request:** On **My Buildings**, open the building's **Actions** menu and select the appropriate request type.
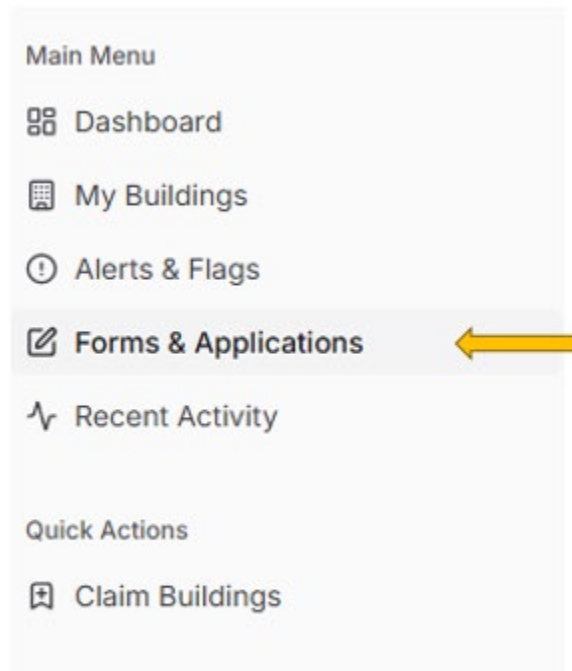
7.0 Claim Buildings Page

Use **Claim Buildings** to add a building to your **My Buildings** list in the **Montgomery County Benchmarking Portal** (the **Benchmarking Portal**). Claimed buildings are associated with the **active account**.

Note: If your buildings were migrated from the County's previous tool, they will already appear in **My Buildings** and you do not need to claim them again.

7.1 Claim Buildings

To claim a building, select **Claim Buildings** in the left navigation menu. **Click** within the search box to search for building using the Montgomery County Building ID or the building's address. The table will automatically update with buildings matching the search criteria.

7.1.1 Claiming a Building

To claim an unclaimed building:
1. Find the building in the table.
2. Select **Claim** in the **Action** column.

After a successful claim, a confirmation message will appear and the building will be added to the **My Buildings** page.

7.1.2 Transfer Requests

If a building is already claimed by another account, you can request that access be transferred to your account. On the **Claim Buildings** page, select **Request Transfer** in the **Action** column.

After you submit a transfer request, manage it from **My Buildings** by selecting the **Transfer Requests** tab. This tab shows both:

Outgoing requests (requested by your account), and **Incoming** requests (requests from other users to transfer buildings currently claimed by your account).

7.1.2.1 Manage Transfer Requests
Open **My Buildings**, then select the **Transfer Requests** tab to view and manage transfer activity.

The table includes:
- **Building ID**
- **Current Owner** (email address displayed)
- **Requested By**
- **Request Direction** (Outgoing or Incoming)
- **Status** (Pending, Approved, or Denied)
- **Request Date**
- **Actions**

Actions depend on the request direction:
- For **Outgoing** requests, select **Cancel** to cancel a pending request.
- For **Incoming** requests, select **Approve** or **Deny** to respond to the request.

7.2 Removing a Building from Your Account

If you accidentally claim a building that you do not own or manage, you can remove it from your account so the correct organization can claim it.

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To remove a building:

1. Go to **My Buildings**.
2. Find the building in the table.
3. Open the building's **Actions** menu (three dots).
4. Select **Remove**.

After you remove the building, it will no longer appear in **My Buildings** for the active account.

Removing a building from your account does not delete the building from the Benchmarking Portal.