Revised August 2025

# Clark Public Utilities
# Data Exchange with ENERGY STAR® Portfolio Manager®
# Step by Step Guide

Portfolio Manager (PM) is an interactive, web-based energy management tool that allows you to track and assess energy and water consumption across an entire portfolio of buildings.

After creating a Portfolio Manager Account and sharing your property and meter(s), Clark Public Utilities will automatically upload the building's utility consumption and cost data to your account via Portfolio Manager Data Exchange. This allows you to benchmark your building's energy performance, estimate your carbon footprint, assess energy management goals over time, and identify strategic opportunities for savings. If your building falls into one of the categories eligible to receive ratings, you may also earn ENERGY STAR recognition.

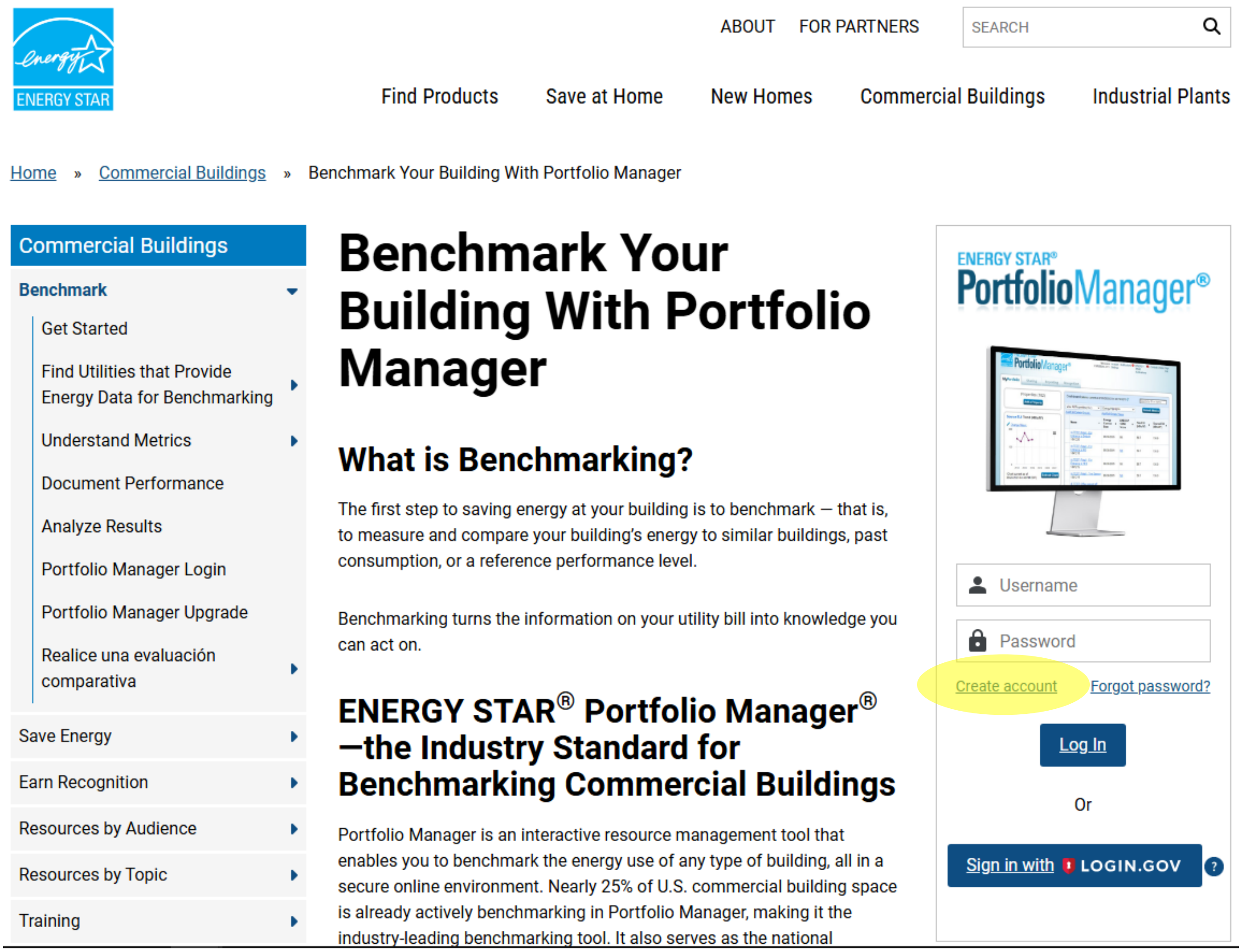
It is your responsibility as the customer to provide Clark Public Utilities with all the account or meter numbers associated with a building. You will submit this information to the utility on the required Consumption Request Form with Attachment A and the utility will provide consumption data for all listed accounts. If you have difficulties identifying all of the accounts in the building, utility assistance may be available.

After you complete the appropriate forms, get started by following this Step by Step Guide.

## Contents

# Step 1: Register a Portfolio Manager account

- Go to the ENERGY STAR Portfolio Manager Login page and click on **Create Account** http://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager




- Fill out the required information (marked by a red asterisk) and select **Create My Account**
- A link to activate your Portfolio Manager account will be emailed to you - the link is only available for 24 hours
- Once activated, log into your Portfolio Manager account

## Create an Account

### Accessing Your Account

Username: *

Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

Confirm Password: *

### About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: * Select Country

Language: English

Reporting Units: Conventional EPA Units (e.g., kBtu/ft²) / Metric Units (e.g., GJ/m²)

Street Address: *

City/Municipality: *

State/Province: * - - - Select - - -

Postal Code: *

### About Your Organization

Organization Name: *

Primary Business or Service of Your Organization: * Select Primary Business or Service

Is your organization an ENERGY STAR Partner? Yes / No

### Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?

**Do you want your username to be searchable by other Portfolio Manager users?** You must select "Yes" if you want to connect with other users to allow automatic upload of utility data or to share properties.

Yes / No

### Confirm Your Identity

Please confirm that you are a human

I'm not a robot

reCAPTCHA

Privacy - Terms

Create My Account Cancel

## Selecting a Username

**You cannot change your username**, so choose wisely. For organizations with multiple properties, we recommend you **create a "corporate" account** which "owns" all of the properties and have an administrator share properties with employees' individual accounts as necessary.

## First & Last Name for Organizations

If you are creating a corporate account, you can enter your organization's name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

## Primary Business or Service

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

## Connecting with Others in Portfolio Manager

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

# Step 2: Creating a Property and Meter

## Add a Property

Start by logging in to Portfolio Manager at https://portfoliomanager.energystar.gov/pm/

- Click **Add a Property** on the MyPortfolio tab
- Answer the questions about your property and click **Get Started!**
- Enter basic property information and select the boxes next to the statements that apply to your property - click **Continue**
- Enter Use Details such as Gross Floor Area (GFA), operating hours, and number of workers for each type of use
  - You can use default or temporary values at this time and enter more accurate data later
  - Note: Hover the mouse over or click the Use Detail to see a definition
- Click **Add Property** - when you have successfully added your property, you will see the property's Summary tab
- If you have additional types of uses on the property, you can add them at any time
  - Click the property's **Details** tab, and then click the **Add Another Type of Use** drop-down menu
  - Select a property use, then click **Add**
  - Enter the Property Use Details and then click **Save Use**

*All property Types can be benchmarked. For properties with multiple buildings, only hospitals, hotels, K-12 schools, multifamily and senior living communities are eligible to receive the 1-100 ENERGY STAR Score.*

### Properties with Multiple Use Types

Some properties include multiple-use types, such as restaurants in hotels, salons in senior living communities, and cafeterias in hospitals. As a general rule, if a certain use commonly occurs in the type of property being benchmarked, do not break it out as a separate Property Use Type. Simply include its square footage with the building's primary use.

### Additional Information

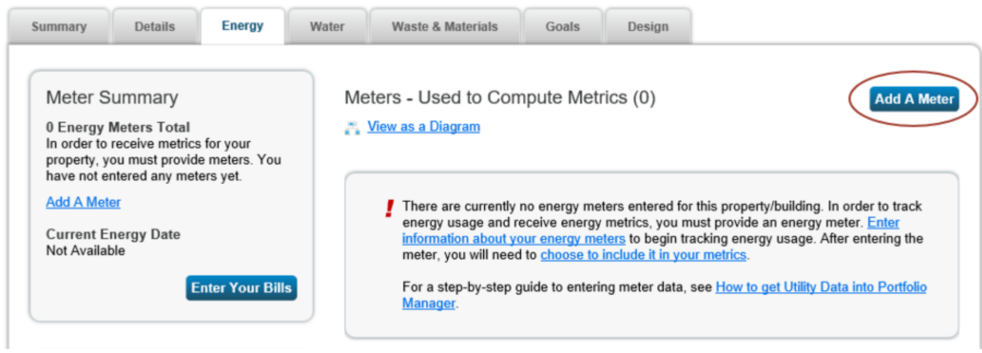
You will need to add at least one Energy Meter to the property. This is the meter that Clark Public Utilities will use to provide you with the facility's energy use.

If there are multiple meters billed to your Clark Public Utilities account or you have **more than one** tenant occupying the building, you will need to create one meter that will act as the aggregate meter. If you create an aggregate meter, Clark Public Utilities will inactivate your old meter(s) in Portfolio Manager once the new meter data is populated. When naming the meter, we suggest using the Clark Public Utilities account number or meter number if there are multiple meters per account.

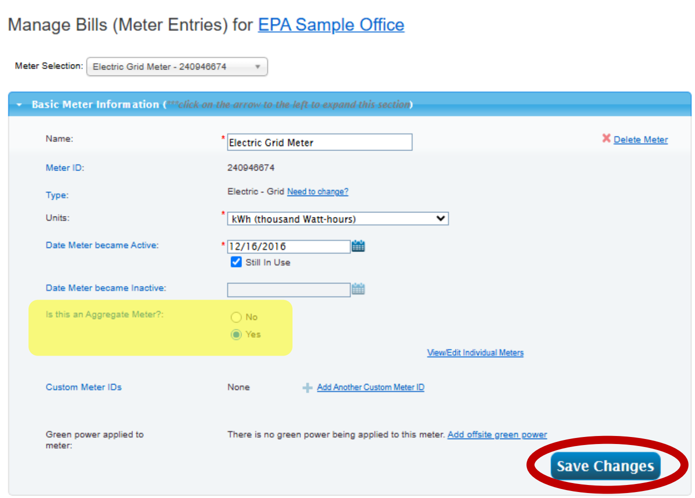
**Note:** The Energy Meter Units will always be kWh - please **do not** check the box for **Enter as Delivery**.

## Add an Electric or Water Meter

To receive the most accurate picture of your building's performance, tell Portfolio Manager how much energy and water your building consumes. Follow these steps to enter energy and water meters for your property.




- Click on your property from the MyPortfolio tab, then select either the **Energy** or **Water** tab
- Click **Add a Meter**
- Select the type of energy (Electric for Clark Public Utilities) or water (Municipally Supplied Potable Water) you want to track
- Select the appropriate additional options, enter the number of meters used and click **Get Started**!
- Click on a meter to enter the units your energy (kWh) or water (cf) data is measured in and the first bill date
- If you would like to add Custom Meter IDs, enter them in the text box - click **Create Meters**
- Select the boxes of the meters that total your property's energy or water use on the **Select Meters to Include in the Metrics** page - click **Apply Selections**
- If you are adding an aggregate meter:
    - Select the meter to open up the **Manage Bills** section
    - Change the **Is this an Aggregate Meter?** option to Yes and select **Save Changes**




**Note: Clark Public Utilities provides electricity for all of Clark County but only provides water in select areas. Please verify the water provider on your billing statement.**

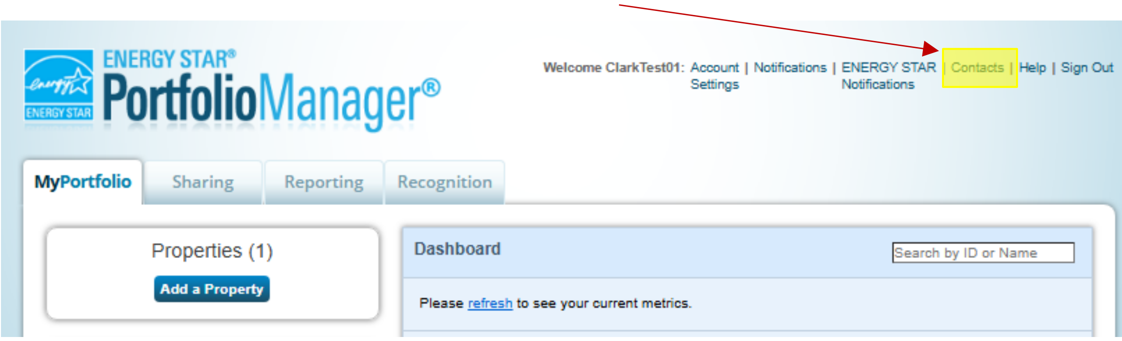
*For more training and how to guides on Portfolio Manager, benchmarking and other energy efficiency tools, visit: https://www.energystar.gov/buildings/training*

# Step 3: Connecting to Clark Public Utilities

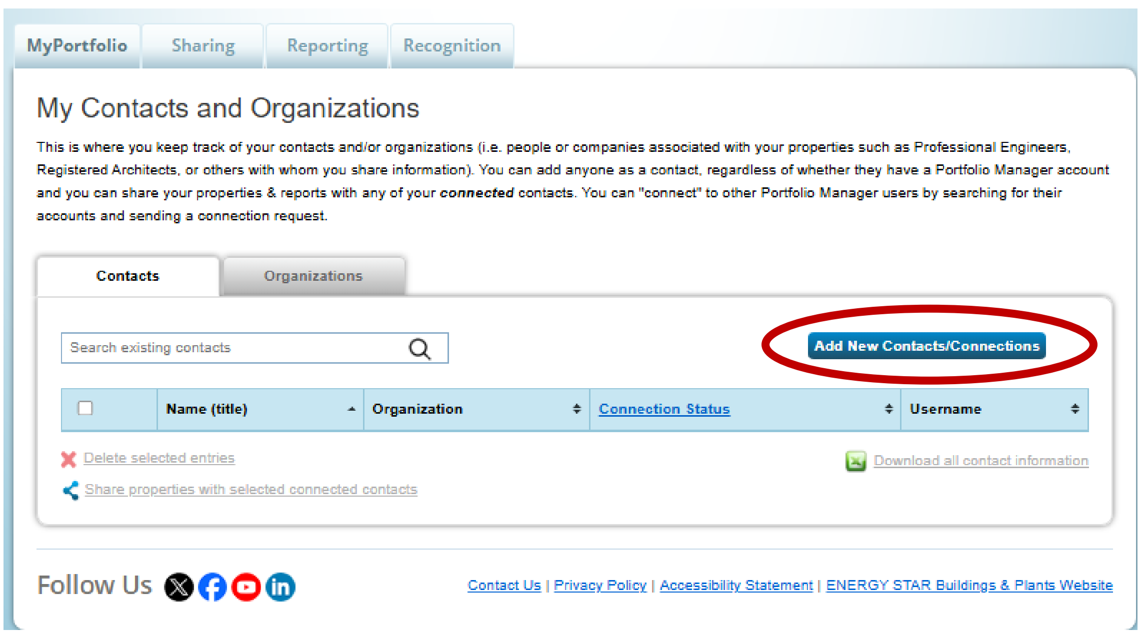
- Complete the Consumption Request Form with Attachment A and return to Clark Public Utilities at pmdataexchange@clarkpud.com
  - Collect ALL account numbers, meter numbers, and meter names as they appear in Portfolio Manager for the buildings you wish to benchmark
  - If there is more than one tenant in the building **and** you are not creating an aggregate meter, you will need each tenant's signature in order for Clark Public Utilities to release energy data
- Send a connection request to Clark Public Utilities in Portfolio Manager (see below)
  - **Note:** Clark Public Utilities will not accept the connection request until the appropriate forms have been received with complete data

## Sending a Connection Request

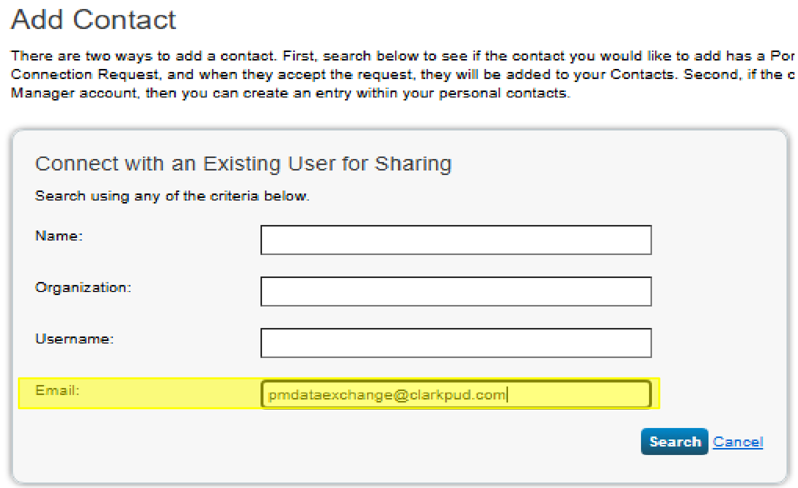
- Log in to Portfolio Manager and click on the **Contacts** link in the upper right-hand corner



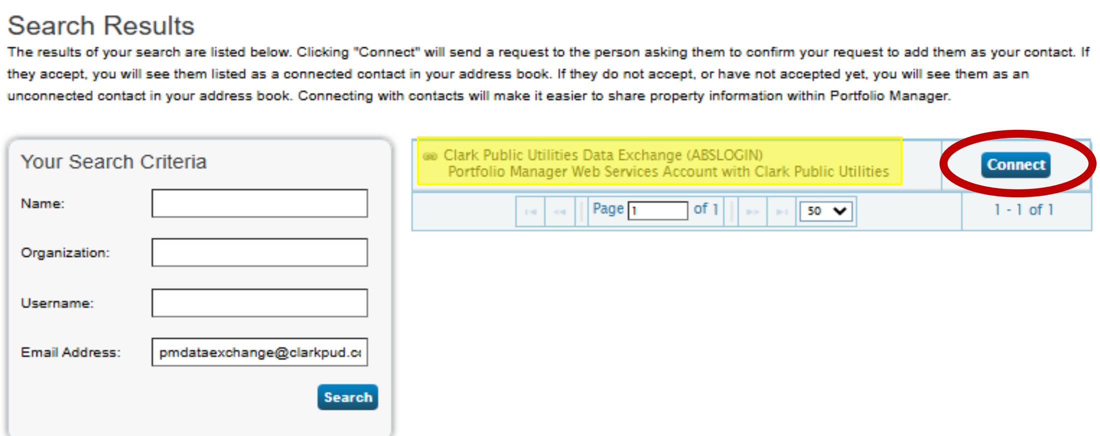

- Select **Add New Contacts/Connections**



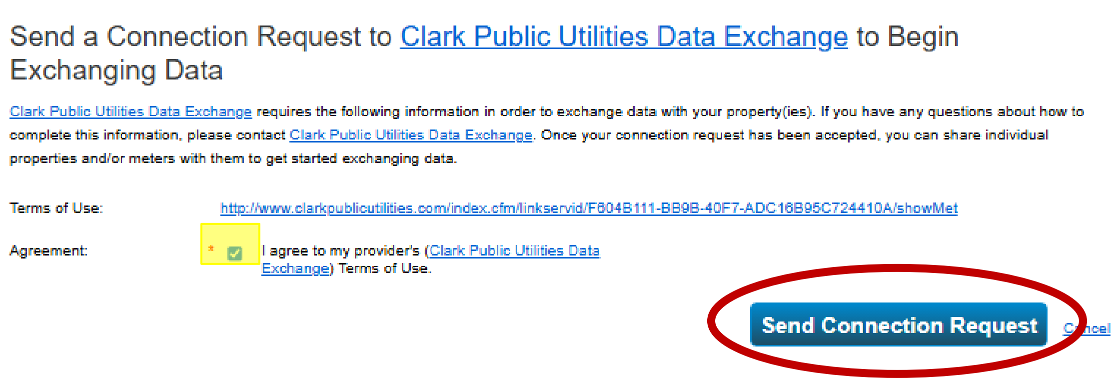
- Enter pmdataexchange@clarkpud.com in the email field and click **Search**



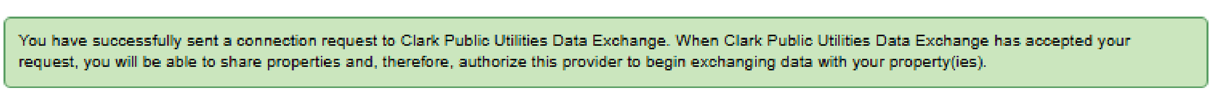

- Ensure the result shows “Clark Public Utilities Data Exchange (ABSLOGIN)” and click on the **Connect** button



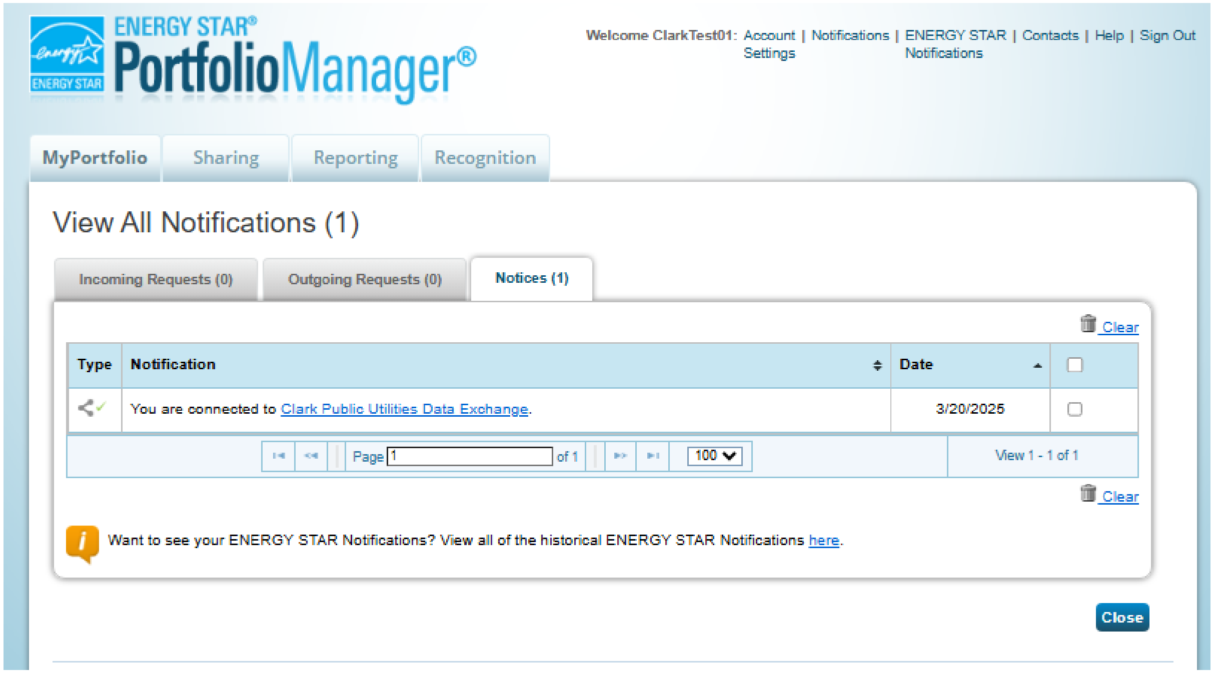

- You will be prompted to agree to our Terms of Use; if you agree with our terms, please check the box and then click **Send Connection Request**




- A dialog box will appear confirming that the connection request has been sent



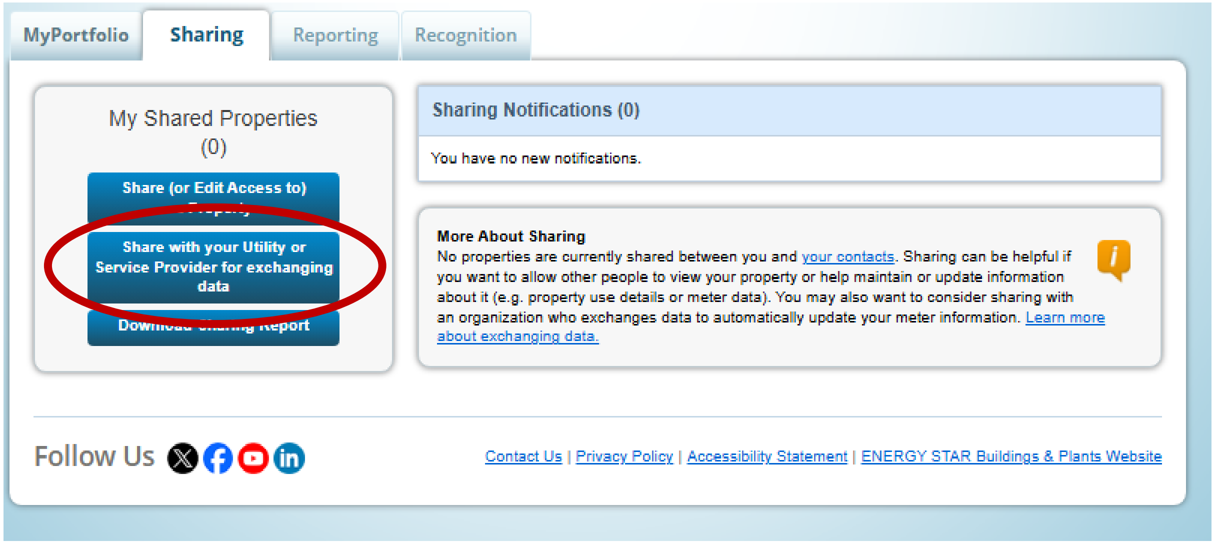
- You will be notified that the connection request has been accepted via a message that will appear in the “Notifications” section of the main screen of Portfolio Manager the next time you login
- The originator of the request will receive an email back from the Clark Public Utilities Data Exchange Team notifying them that the connection request has been accepted
    - Note: You cannot move on to Step 4 until your connection request has been accepted



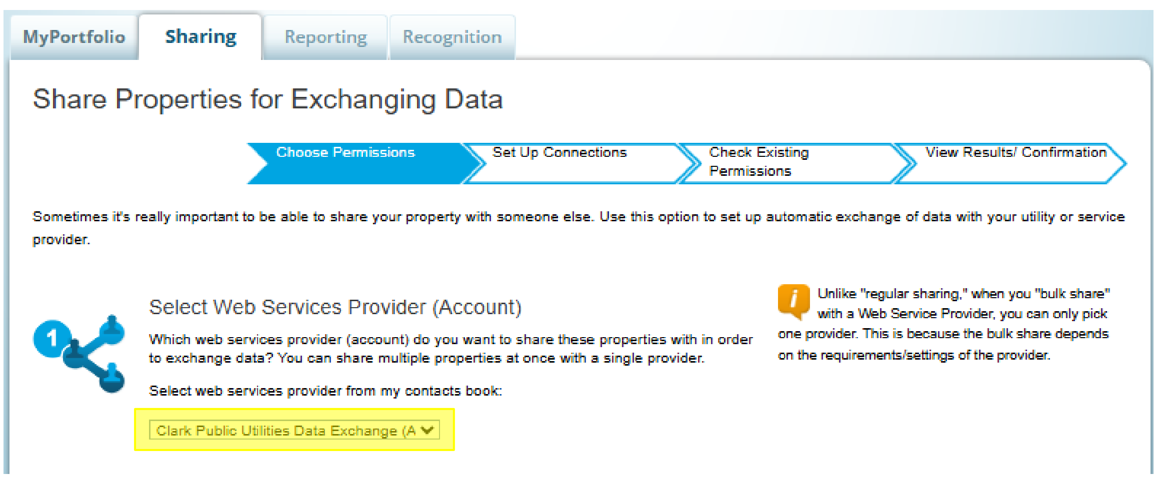

- We typically respond to connection requests within five (5) business days.
- **If your connection request has not been accepted within that timeframe, please double-check that a completed Consumption Request Form with Attachment A has been returned to Clark Public Utilities at pmdataexchange@clarkpud.com**
    - If all necessary forms have been submitted, please contact us at pmdataexchange@clarkpud.com

# Step 4: Sharing Properties/Meters with Clark Public Utilities

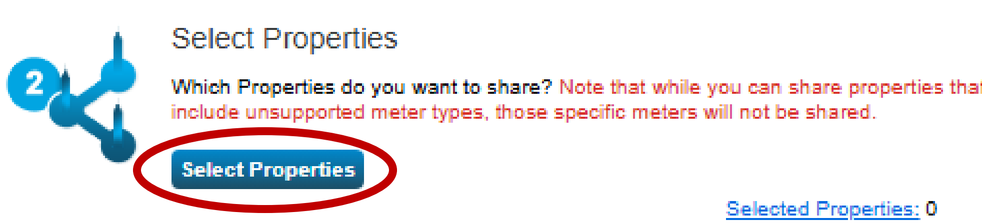
- Log into Portfolio Manager, click on the **Sharing** tab and click **Share with your Utility**...



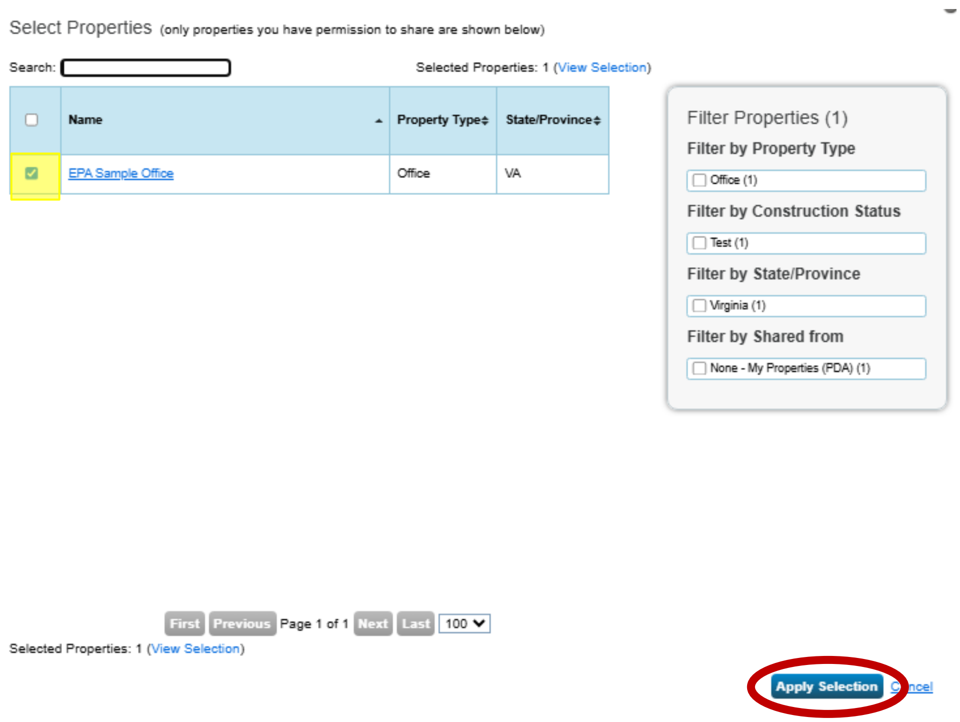

- On the **Sharing** tab ensure "Clark Public Utilities Data Exchange (ABSLOGIN)" is the selected web services provider



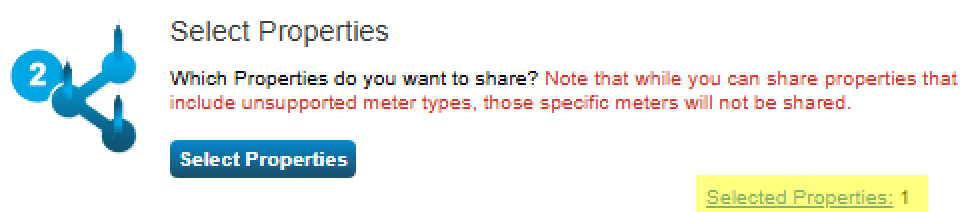

- Click on **Select Properties**



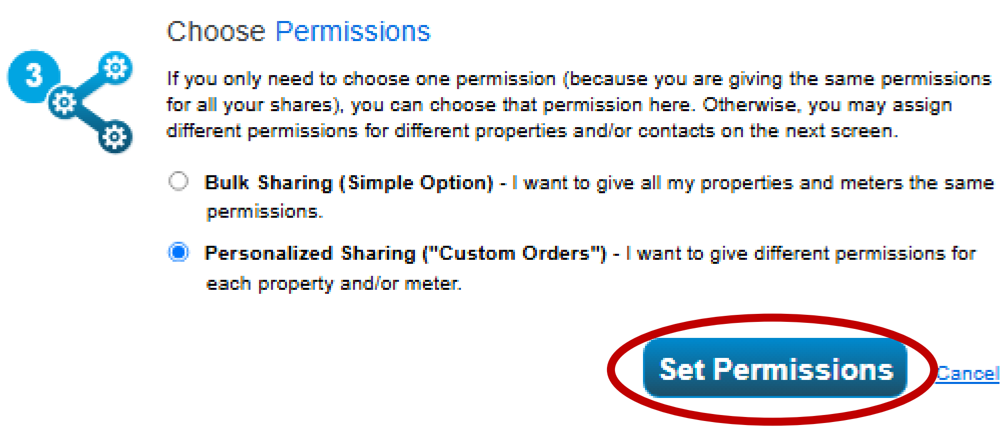
- Select properties as applicable and click on **Apply Selection**



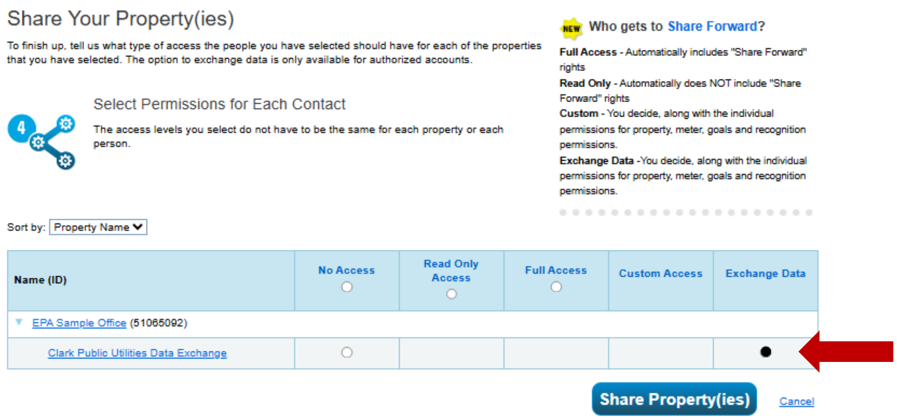

- Confirm the number of selected properties is correct



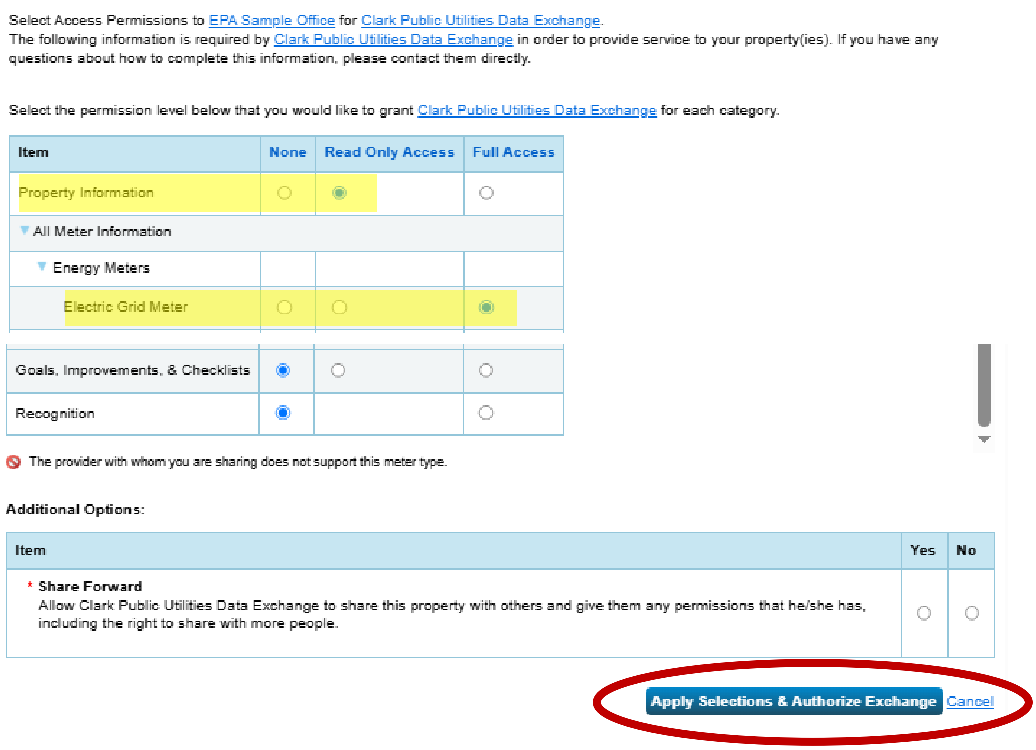

- Set the Choose Permissions option to **Personalized Sharing** and click on **Set Permissions**



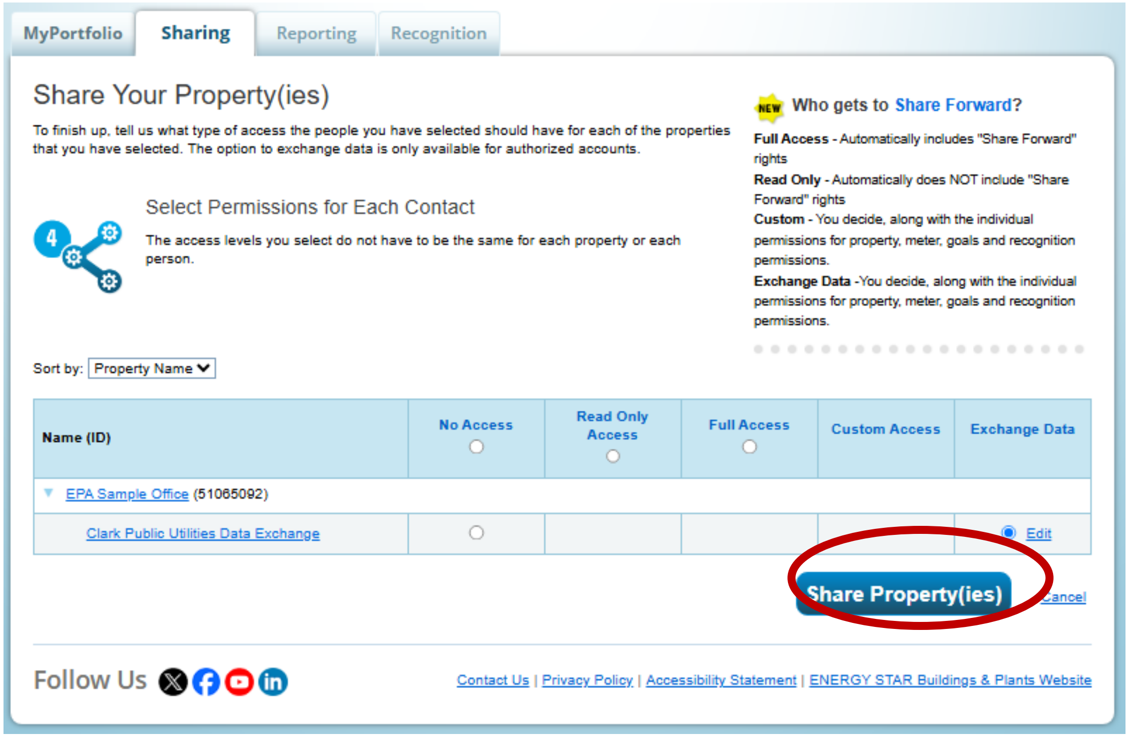
- Select the radio button in the Exchange Data column



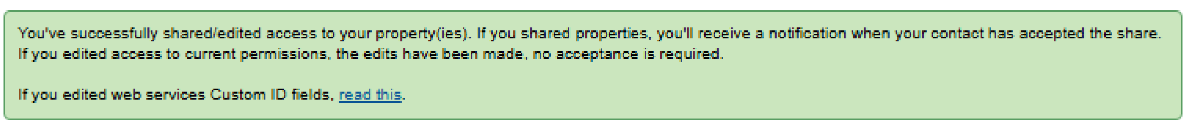

- A pop-up window will immediately appear – select Read Only Access for Property Information and Full Access for all meters that Clark Public Utilities provides
  - **In order for Clark Public Utilities to exchange data with Portfolio Manager we must be granted Full Access to each meter**
  - All other options can be set to None
- Select **Apply Selections & Authorize Exchange**



- Confirm the radio button in the Exchange Data column is populated for all applicable properties and select **Share Property(ies)**




- You will be returned to the **Sharing** tab and should see the following confirmation banner




- Reply to the email from the Clark Public Utilities Data Exchange Team referenced in Step 3 that you have completed the step to share all applicable properties and meters
- Clark Public Utilities will accept the share request(s) and, within ten (10) business days, we will automatically upload the last 12 months of meter consumption and cost data into your account
    - Up to 36 months of historical data is available upon request
    - We can also provide kW information for commercial and industrial meters upon request
- The Clark Public Utilities Data Exchange Team will email you once the upload is complete

# Frequently Asked Questions

**What if I am currently entering meter data manually in Portfolio Manager and would like to begin using Clark Public Utilities' data exchange?**

Login to your existing Portfolio Manager account and complete Step 3 and Step 4. If you have only one meter associated with your electric account, this meter will now become the meter that Clark will use to automatically upload data into your account. If you have more than one meter associated with your electric account or there is more than one tenant in your building, follow the process in Step 2 to create an aggregate meter* which Clark will use moving forward.

**If you create an aggregate meter, Clark Public Utilities will inactivate your old meter(s) once the new meter data is populated.*

**What is an aggregate meter?**

An aggregate meter in PM Data Exchange is a "consolidation" meter that allows Clark Public Utilities to combine consumption and cost information for two or more meters and accounts thereby anonymizing the information.

**When do I need to create an aggregate meter in Portfolio Manager?**

If there are multiple meters in the building or complex that are billed to various tenants, we suggest creating one aggregate meter that will consolidate and anonymize tenant consumption data. You can also create an aggregate meter anytime you want to combine consumption data from multiple meters into a single data point.

**How do I ensure all of the energy usage for my building is captured in the aggregate meter data?**

It is your responsibility as the customer to provide Clark Public Utilities with all of the account or meter numbers associated with a building. You will submit this information to the utility on the required **Consumption Request Form with Attachment A** and the utility will provide aggregate data for all listed accounts. If you have difficulties identifying all of the accounts in the building, utility assistance may be available.

**When does the building owner or tenant need to sign the account holder release?**

Any time consumption and cost data is being requested for a single meter or account, the Clark Public Utilities account holder will need to sign authorizing the release of their consumption data. If the building owner is the account holder, they may sign as either the owner or account holder.

**What buildings are eligible for benchmarking and receiving the ENERGY STAR label?**

Refer to the ENERGY STAR website for building eligibility: https://www.energystar.gov/buildings

**Why doesn't my building have an ENERGY STAR rating?**

There are many reasons why your facility may not have a rating. Verify your information with the data quality checker. Once you've entered your data, Portfolio Manager has a handy tool to help you check for errors and anomalies. From the **Summary Tab** of each property, you can run a simple report to compare your data with typical values. This will help you identify energy values and property use details that are unusual given your building's use. It'll also help you identify possible typos, incorrect meter readings, missing information, incorrect units of measure, and other common data entry problems.

**How often will my data be automatically uploaded?**
Clark Public Utilities automatically uploads meter data by the fifth business day of each month.

**What information is included in the data exchange upload?**
Electric meter consumption data will be entered in kWh (kilowatt-hours) but will not include kW (demand) (unless requested) or power factor penalties. Water meter consumption data (if applicable) will be entered in cubic feet. Cost data will not include basic service charges, taxes or Green Lights charges.

**Who do I contact with questions?**
For questions related to ENERGY STAR Portfolio Manager, make sure to check their FAQ and Help, which can be accessed from the link at the top right corner of any screen in Portfolio Manager. For additional assistance, contact buildings@energystar.gov.

For additional technical assistance from the Clark Public Utilities Data Exchange Team, contact pmdataexchange@clarkpud.com.