

***Energy Efficiency
Planning for Rural
Communities (EEPRC)
Technical Assistance Program***

***Energy Star Portfolio
Manager Trainings***



GOVERNOR'S OFFICE OF
Policy Innovation
and the Future

Late Sept. – Early Oct. 2025

Maine EEPRC

ENERGY STAR PORTFOLIO MANAGER TRAINING SESSION 3: MAINTENANCE & TROUBLESHOOTING

THURSDAY, OCT. 9TH 2025

PRESENTED BY



MADE POSSIBLE BY



GOVERNOR'S OFFICE OF
Policy Innovation
and the Future



PROGRAM TEAM ORGANIZATIONS

1



GOVERNOR'S OFFICE OF
Policy Innovation
and the Future

Maine GOPIF, State Team

Based in Augusta, ME

2



PowerOptions, Consultant Team

Based in Boston, MA

3



RBG, Energy Auditor Team

Based in Concord, NH



GOVERNOR'S OFFICE OF
**Policy Innovation
and the Future**

State Team



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*Primary point of contact for
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Consultant Team



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*Program Director, Energy
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Senior Advisor



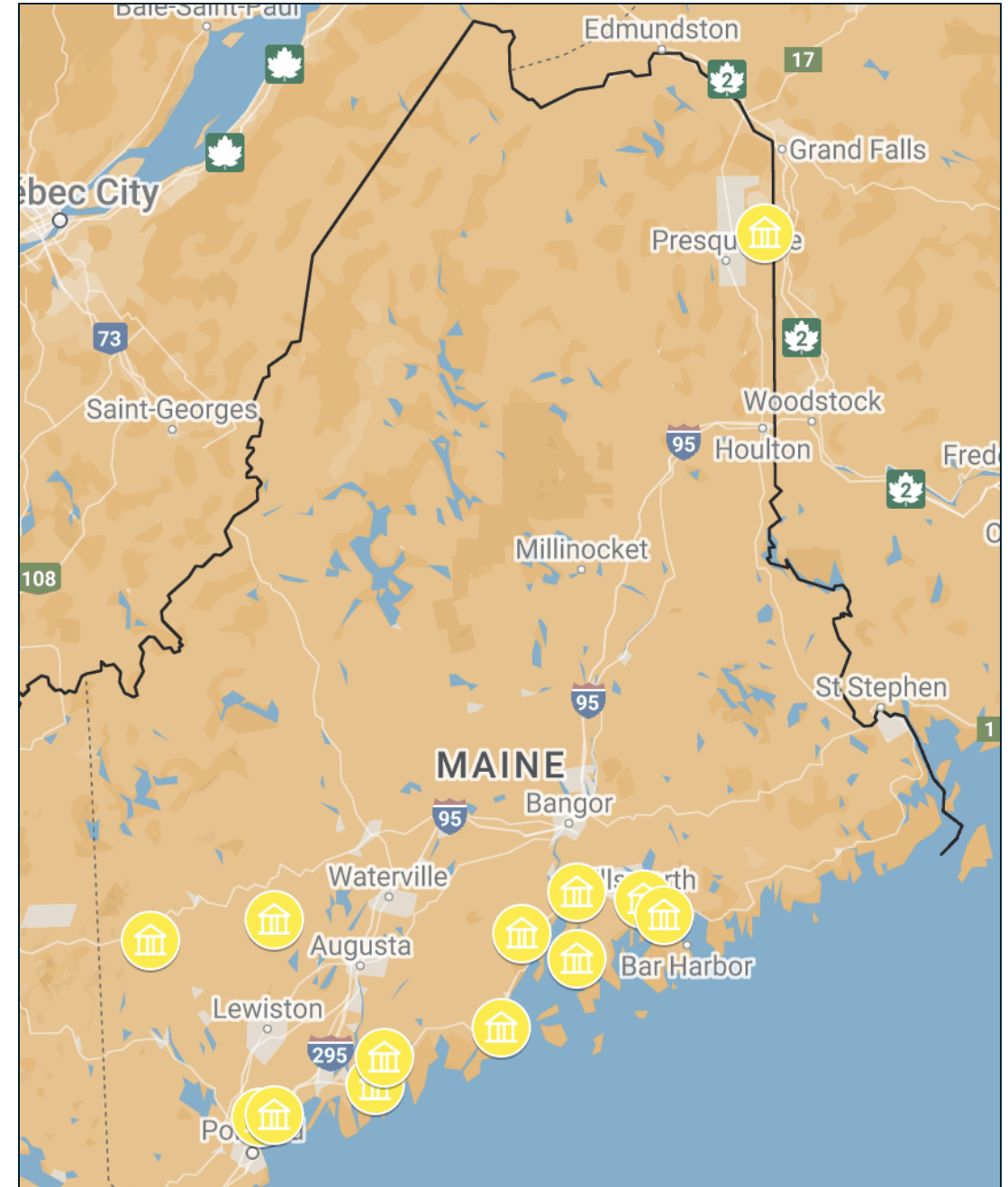
Erin Camp, PhD
*Junior Energy Analyst, Energy
Sustainability, and Analytics*

Portfolio Manager Advisor

PARTICIPATING COMMUNITIES

in alphabetical order

- | | |
|-------------------|---------------------|
| 1. Arrowsic | 8. Lamoine |
| 2. Belfast | 9. Livermore Falls |
| 3. Bethel | 10. Orland |
| 4. Brooksville | 11. Rockland |
| 5. Cumberland | 12. Westport Island |
| 6. Ellsworth | 13. Wiscasset |
| 7. Fort Fairfield | 14. Yarmouth |



Maine EEPRC PROGRAM TIMELINE

Program Stage	When?	Apr. 2025	May. 2025	Jun. 2025	Jul. 2025	Aug. 2025	Sep. 2025	Oct. 2025	Nov. 2025	Dec. 2025	Jan. 2026	Feb. 2026	Mar. 2026	Apr. 2026	May. 2026	Jun. 2026	Jul. 2026	Aug. 2026	Sep. 2026
0. Kick Off & Orientation Introduction to program and program teams.	Apr. 2025																		
1. Building Energy Audits For two (2) buildings in each community.	Apr. 2025 to May 2026																		
2. Energy Star Portfolio Manager Trainings Three (3) total, held virtually.	Sept. 2025 to Nov. 2025																		
3. Energy Conservation Plans Develop a plan for each community.	Apr. 2025 to Jul. 2026																		

RECAP: AGENDA (Session I: Sept. 25th)

BENCHMARKING & BASICS

1. Benchmarking Your Buildings
2. Understanding Energy Bills
3. Portfolio Manager: Getting Started
4. Portfolio Manager: Energy Benchmarking In Practice

COMMUNITY LIAISON TAKE-AWAY TASK (from 9.25.25)

1. Create an Account for Your Community
2. Create an Account for Yourself
3. Add Your Community's Maine EEPRC Buildings to Portfolio Manager



RECAP: AGENDA (Session II: Oct. 2nd)

SHARING, DASHBOARDS, AND REPORTS

1. Connections, Sharing & Access
2. Multi-Building Dashboard
3. Single Property Dashboards
4. Reports
5. Templates as Tools

COMMUNITY LIAISON TAKE-AWAY TASK (from 10.2.25):

1. Connect your Community account with your Individual account.
2. Share Community Property data with your Individual account.
3. Create a Custom Report for 1-2 Community Properties.



TODAY'S AGENDA (Session III: Oct. 9th)

MAINTENANCE & TROUBLESHOOTING

1. Setting Energy Baselines & Targets
 - Energy (Portfolio-Wide and Single Property)
 - Emissions (Single Property)
2. Portfolio Data Maintenance
 - Best Practices: Protocol, Cadence, and Checklist
 - Running Custom Reports
3. Error Messages & Troubleshooting
 - Data Quality Checker (DQC)
 - Navigating Energy Meter Information
 - Knowing When To...
4. Closing Resources



1. SETTING BASELINES & TARGETS

ENERGY

BASELINE & TARGET BREADTH

- A. Portfolio-Wide Targets
- B. Single-Building Targets

BASELINE TYPES

- Energy use from a specified year
- Water use from a specified year
- Waste use from a specified year

TARGET TYPES

- Target ENERGY STAR Score (score from 0-100 based on EUI)
e.g. Raise score to 75+ by 2030
- Target % Better than Baseline Source EUI (based on Community baseline)
e.g. 20% EUI reduction by 2030
- Target % Better than Median Source Baseline (based on EUI from similar U.S. property types)
e.g. 15% EUI median for similar property types by 2030

IMPORTANT: Before you set energy targets, properties must have 12+ months of consecutive energy data.

1. SETTING BASELINES & TARGETS

ENERGY: PORTFOLIO-WIDE

SETTING PORTFOLIO-WIDE BASELINES & TARGETS

1. Go to **MyPortfolio**.
2. In the left **Manage Portfolio** box, click “**Set a portfolio baseline and/or target**”.
3. Set baselines:
 - a. (Simplest Option) Choose whether to let Portfolio Manager automatically set baselines for properties or keep property-specific baselines as currently set.
 - b. Pick your target type and enter the target value.
4. Set targets:
 - a. Set the target year/date you’re aiming to reach it.
5. Click “**Save Baselines & Targets**”

IMPORTANT: Any baselines or targets that you input will overwrite previous ones.

Set Baselines & Target for All Properties

You can establish the same performance baseline and target for all of your properties. **Be careful! Selections here will overwrite any baseline or targets you have already made for your individual properties.** Changes you make below will change all properties where: you are the PDA, you have Full Access, or you have Full Access to Goals tab. If you prefer to set baselines and targets for each property individually, you can do that on each property's Goals tab.

Baselines

Energy Baseline: ☐ Select a baseline year: Month ☐ Year ☐ Let Portfolio Manager automatically set my baselines ☒ Leave property-specific baselines as currently set

Water Baseline: ☐ Select a baseline year: Month ☐ Year ☐ Let Portfolio Manager automatically set my baselines ☒ Leave property-specific baselines as currently set

Waste Baseline: ☐ Select a baseline year: Month ☐ Year ☐ Let Portfolio Manager automatically set my baselines ☒ Leave property-specific baselines as currently set

Energy Target

Target Metric: ☐ Leave property-specific targets as set

Target Value:

Save Baselines & Target [Cancel](#)

Selecting Baselines

A baseline is made up of 12 full calendar months of use information as well as meter entries (either energy, water, or waste/materials). It is defined by selecting the last month in the time frame (also known as the Year Ending Date). You can choose to select the same baseline date for all your properties or Portfolio Manager can automatically determine the baseline for each individual property by calculating the earliest eligible year ending date. If you have set specific baselines for individual properties, make sure to choose the option to leave them alone, or they will be overwritten.

Be Careful

Setting baselines and targets using this form will re-set any targets or baselines you have set for your properties individually.

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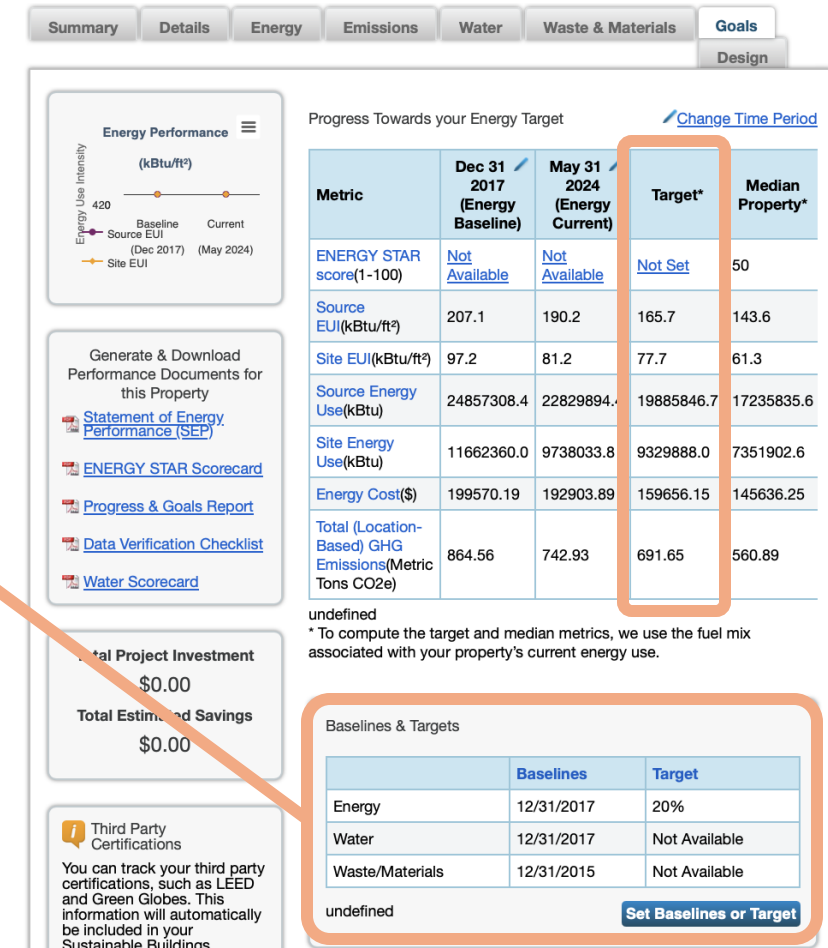
1. SETTING BASELINES & TARGETS

ENERGY: SINGLE PROPERTY

SETTING PORTFOLIO-WIDE TARGETS

1. Go to **MyPortfolio**.
2. Click the desired property.
3. Go to the **Goals** tab.
4. In **Baselines & Targets**, select “**Set Baselines or Target.**”
5. Set targets:
 - a. Choose your target type and enter the value.
6. Set baselines:
 - a. Confirm / edit the baseline and the target date.
7. Click “**Save Baselines & Targets.**”

IMPORTANT: Any baselines or targets that you input will overwrite previous ones.

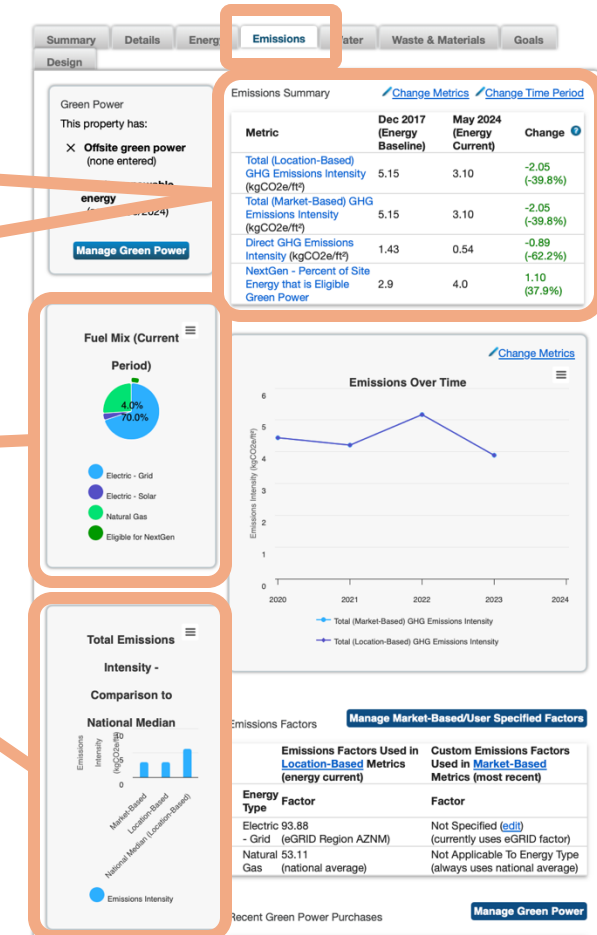


1. SETTING BASELINES & TARGETS

EMISSIONS: SINGLE PROPERTY

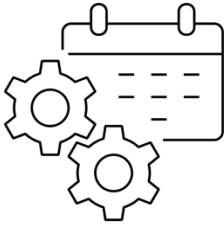
TARGET TYPES

- Target Total GHG Emissions (Metric Tons CO₂e)
e.g. 15% GHG emissions reduction by 2030
- Target Total GHG Emissions Intensity (kgCO₂e/ft²)
e.g. 10% GHG emissions intensity reduction by 2030
- Target Increase in Electricity as % of Fuel Mix (by reducing reliance on natural gas and delivered fuels)
e.g. 10% increase in Electricity as % of fuel mix by 2030
- Reduce Emissions Intensity in Comparison to National Median



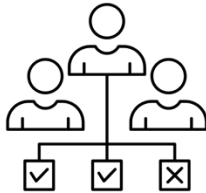
2. PORTFOLIO DATA MAINTENANCE

DATA MAINTENANCE PROTOCOL



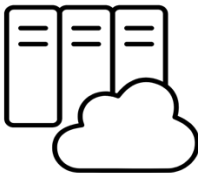
1. Maintenance Schedule

- a. Create a maintenance schedule & establish cadence.



2. Roles & Access

- a. Who will perform maintenance tasks?
- b. Do all needed persons have accounts?
- c. Who will have access to saved data?
- d. Where should reports, etc. be saved?



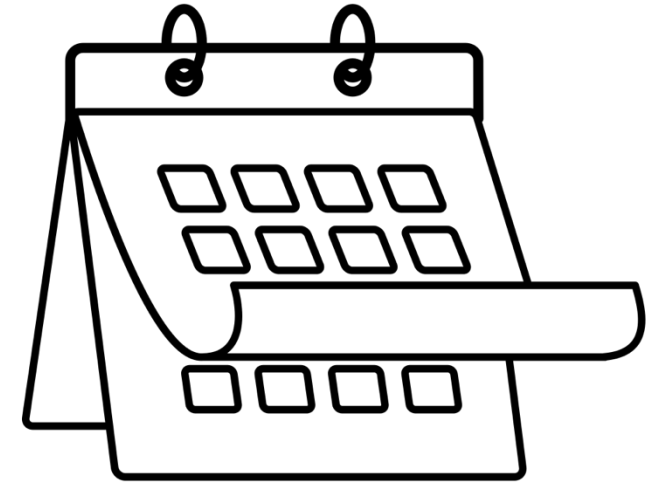
3. Resources & Templates Library

- a. Create your own!
- b. See end of this slide deck.

2. PORTFOLIO DATA MAINTENANCE

DATA MAINTENANCE CADENCE (RECOMMENDED)

- **Monthly**
 - Utility Bill Entry (incl. \$\$)
- **Quarterly**
 - Complete Data Maintenance Checklist (*next slide*)
 - Run & Save Custom Reports for all Properties (*upcoming slides*)
- **Annually**
 - Share Portfolio Data Report w Community Leadership
- **As Needed**
 - Add / Remove Meters
 - Add / Remove / Edit Properties



IMPORTANT: While your Community may track data against the Calendar Year **or** Fiscal Year, it's often simpler to track against the Fiscal Year to align with the Community budget cycle.

2. PORTFOLIO DATA MAINTENANCE

DATA MAINTENANCE CHECKLIST

1. SCAN FOR DATA GAPS & ERRORS (USE DQC)

- a. Run Data Quality Checker (DQC) for desired time range.
- b. If your ENERGY STAR Score is extremely low or extremely high (0-100),
- c. then this can suggest there is missing data, or meters not selected.

2. FILL IN MISSING DATA

- a. Input missing meter data / bills.

3. CORRECT METER TIMELINES

- a. Ensure meter data is not overlapping or incomplete.
- b. Delete duplicates.

4. VERIFY UNITS & FUEL TYPES ENTERED

- a. Ensure units & fuel types are entered correctly for each utility meter / bill.
- b. If listing a delivered fuel bill, be sure that “Enter as Delivery” is selected.

5. REVIEW CAMPUS PROPERTY RELATIONSHIPS (CHILD VS. PARENT)

- a. Ensure that the properties are listed correctly as “Parent” (i.e. name of the Campus / collection of properties or primary Campus property) or “Child” (i.e. properties within a Campus or satellite property).

TIP: A checklist like this should be incorporated into your Portfolio Manager data maintenance protocol & schedule.



2. PORTFOLIO DATA MAINTENANCE

CREATING CUSTOM REPORTS

CREATE & SAVE CUSTOM REPORT TEMPLATES

1. Click the **Reporting** tab.
2. Click **“Create New Template”**
3. Enter a Name for the Custom Report Template.
4. Select your desired Timeframe.
5. Select which Properties / Buildings you would like to include.
6. Click **“Select Information and Metrics.”**
7. Select desired metrics to include in your Custom Report Template.
8. Click **“Apply Selection”** when done.
9. Click **“Save Template”** (accessible in your **Reports** tab).

IMPORTANT: If a selected property does not have information for the given time frame, this will skew your report figures.

The screenshot shows the 'Create a Report Template' page in the ENERGY STAR Portfolio Manager interface. The page has a navigation bar with tabs: MyPortfolio, Sharing, Planning, Reporting, and Recognition. The 'Reporting' tab is active. The main content area is titled 'Create a Report Template' and includes a brief explanation of report templates. Below this, there are four numbered steps: 1. Name Your Template (with a text input field containing 'EUI and Property Details'), 2. Select Timeframe of Information to Include (with a dropdown menu set to 'Current Period Ending Date'), 3. Select Properties to Include (with a dropdown menu set to '- Select Number of Property(ies) -'), and 4. Select Information & Metrics to Include (with a button labeled 'Select Information & Metrics' and a 'Selected Items: 4' indicator). On the right side, there are two 'Tip' boxes. The first tip explains that templates will appear in the Templates & Reports section. The second tip explains that if a report template is used to request information from others, only the timeframe and information/metrics need to be selected. At the bottom right, there are 'Save Template' and 'Cancel' buttons. The footer includes social media links (Follow Us) and a list of links: Contact Us, Privacy Policy, Browser Requirements, and ENERGY STAR Buildings & Plants Website.

2. PORTFOLIO DATA MAINTENANCE

GENERATING CUSTOM REPORTS

GENERATING CUSTOM REPORTS

1. Click the **Reporting** tab.
2. Click the **My Reports and Templates** tab.
3. Find the Custom Report you want to generate.
4. Under the **Action** column, click the pull-down menu that says “I want to...”
5. Select “**Generate New Report.**”

IMPORTANT: Save all generated reports offline. Portfolio Manager only keeps them for 90 days (see next slide).

Name	Status	Action
Maine EEPRC Community Report TEMPLATE	Last Modified: 10:18 AM	I want to... Generate New Report Edit this Template Share this Template Request Data using this Template Delete this Template View Link for Sharing
Energy Usage	Last Modified: 12:47 PM	I want to...

MyPortfolio **1** Reporting Recognition

Your report "Emissions Performance" is being generated.
Smaller reports will be ready quickly, please refresh the screen to see if it's ready. Larger reports may take longer to generate. You can view your report from the Action menu below by selecting "View Report" or "Download Report in Excel."
Note: Each property in your report will need full 12 months of data for each time period to generate metrics. Otherwise, "N/A" will be displayed in your report.

Charts & Graphs

ENERGY STAR Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Scorecard
- Water Scorecard

Weather Normalized Source EUI
How much total primary fuel would be required by my properties, under weather conditions?

Requests from Others **2** My Reports and Templates ENERGY STAR Reports

3

Name	Status	Action
Maine EEPRC Community Report TEMPLATE	Last Modified: 10:18 AM	I want to...
Energy Usage	Last Modified: 12:47 PM	I want to... 4

2. PORTFOLIO DATA MAINTENANCE

VIEW OR DOWNLOAD GENERATED CUSTOM REPORTS

VIEW OR DOWNLOAD GENERATED CUSTOM REPORTS

1. Click the **Reporting** tab.
2. Click the **My Reports and Templates** tab.
3. Find the Custom Report you want to generate.
4. Under the **Action** column, click the pull-down menu that says “I want to...”
5. Select “**View Current Report**” or “**Download Current Report in Excel.**”

Your new report(s) has been generated

Name	Status	Action
Maine EEPRC Community Report TEMPLATE	Generated: 10/09/2025 1:07 AM	I want to...
Energy Usage	Last Modified: 10/02/2025 12:47 PM	I want to...

First Previous Page 1 of 1 Next Last 10

Need help with your state/local ordinance report? See our 5-page guide for requests in Portfolio Manager and our FAQ with a link to each city program.

Generated reports will only be available for 90 days. After that time you will need to "generate" a new report.

MyPortfolio Reporting Recognition

1 Your report "Maine EEPRC Community Report TEMPLATE" is being generated. Smaller reports will be ready quickly, please refresh the screen to see if it's ready. Larger reports may take longer to generate. You can view your report from the Action menu below by selecting "View Report" or "Download Report in Excel."

Note: Each property in your report will need full 12 months of data for each time period to generate metrics. Otherwise, "N/A" will be displayed in your report.

Charts & Graphs

ENERGY STAR Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Scorecard
- Water Scorecard

2 Data Requests from Users My Reports and Templates ENERGY STAR Reports Create a New Template

3 Your new report(s) has been generated

Name	Status	Action
Maine EEPRC Community Report TEMPLATE	Generated: 10/09/2025 1:07 AM	I want to...
Energy Usage	Last Modified: 10/02/2025 12:47 PM	I want to...

First Previous Page 1 of 1 Next Last 10

3. ERROR MESSAGES & TROUBLESHOOTING

DATA QUALITY CHECKER (DQC)

HOW TO RUN DATA QUALITY CHECKER (DQC) PT. I

1. Go to **MyPortfolio**.
2. Click one property to check data quality for.
3. Within the **Summary** tab, find the **Data Quality Checker** box in the lower right.
4. Click “**Check for Possible Errors**.”

MyPortfolio | Sharing | Reporting | Recognition

EPA Sample K-12 School
321 Education Way, Phoenix, AZ 85005 | [Map It](#)
Portfolio Manager Property ID: 71047292
Year Built: 1950

[Apply for Recognition](#)
Not currently eligible for ENERGY STAR certification.
Not currently eligible for NextGen Certification.

[Change Metric](#)
ENERGY STAR Score (1-100)
Current Score: 93
Baseline Score: 85

Summary | Details | Energy | Emissions | Water | Waste & Materials | Goals

Source EUI Trend (kBtu/ft²)
[Change Metric](#)
Chart current as of 10/02/2025 12:00 AM

Metrics Summary
[Change Metrics](#) | [Change Time Periods](#)

Metric	Dec 2017 (Energy Baseline)	May 2024 (Energy Current)	Change
ENERGY STAR Score (1-100)	85	93	8.00 (9.40%)
Source EUI (kBtu/ft²)	104.6	88.6	-16.00 (-15.30%)
Site EUI (kBtu/ft²)	55.2	39.0	-16.20 (-29.30%)
Energy Cost (\$)	Not Available	Not Available	N/A
Total (Location-Based) GHG Emissions Intensity (kgCO2e/ft²)	5.15	3.10	-2.05 (-39.80%)
Water Use (All Water Sources) (kgal)	627.8	613.0	-14.80 (-2.40%)
Total Waste (Disposed and Diverted) (Tons)	68.73	70.92	2.19 (3.20%)

Custom Intensity Metrics ([Learn more about this feature](#))
Create up to three custom intensity metrics to view in reporting for this property.

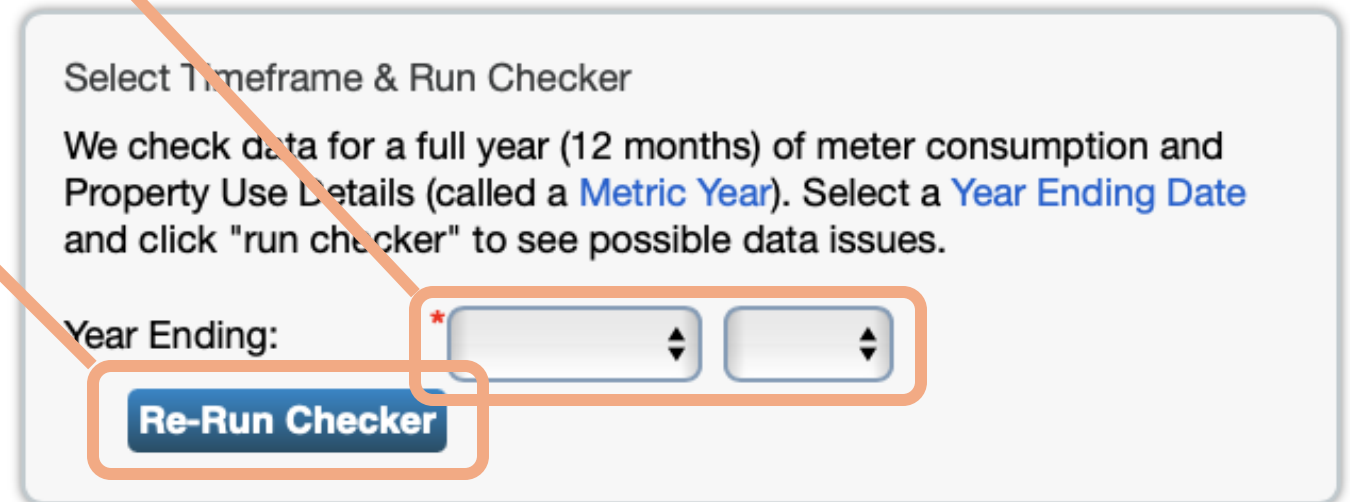
Data Quality Checker
Run a check for any 12-month time period to see if there are any possible errors found with your data.
[Check for Possible Errors](#)

3. ERROR MESSAGES & TROUBLESHOOTING

DATA QUALITY CHECKER (DQC)

HOW TO RUN DATA QUALITY CHECKER (DQC) PT. II

5. Chose your “**Year Ending**” date (to check data quality for the 12 months before selected date).
6. Click “**Run Checker.**”



Select Timeframe & Run Checker

We check data for a full year (12 months) of meter consumption and Property Use Details (called a **Metric Year**). Select a **Year Ending Date** and click "run checker" to see possible data issues.

Year Ending: *

Re-Run Checker

The screenshot shows a web interface for the Data Quality Checker. It includes a title 'Select Timeframe & Run Checker', an explanatory paragraph, a 'Year Ending' label with a red asterisk, two date selection dropdowns, and a blue 'Re-Run Checker' button. Two orange arrows originate from the text instructions: one points to the 'Year Ending' label and the other points to the 'Re-Run Checker' button. The date dropdowns and the button are also enclosed in orange rectangular boxes.

3. ERROR MESSAGES & TROUBLESHOOTING

DATA QUALITY CHECKER (DQC)

DATA QUALITY CHECKER (DQC) ERROR MESSAGES & ALERTS

i About Timeframes

The Data Quality Checker needs one full calendar year of [Property Use Details](#) and [meter](#) information for most checks. Otherwise, we will show you basic alerts to let you know what's missing.

.....

i About Alerts

! Indicates data is incomplete or missing. Most likely at least some metrics are not able to be calculated as a result. Issue should be resolved as soon as possible.

! Indicates data is atypical for the type of property and its associated use. Data should be checked for errors to ensure metrics are correct for the property.

THE DQC SCANS A TIME RANGE OF 12 MONTHS

- The DQC will flag error messages or alerts if you don't have complete data for the time range selected.

RED ALERTS

- Data is missing.
- Action is needed to correct, fill in, or update data.

YELLOW ALERTS

- Be aware. There may be an anomaly that could indicate an error.
- Action may or may not be needed.

3. ERROR MESSAGES & TROUBLESHOOTING

DATA QUALITY CHECKER (DQC)

DATA QUALITY CHECKER (DQC) ERROR MESSAGES & ALERTS

There is not 12 full months of meter data.

- **Action is needed.**
- Add the missing meter entry data that the DQC specifies.

Meter(s) with gaps in meter entries.

- **Action is needed.**
- Add the missing meter entry data that the DQC specifies.

FOR BOTH OF THE ABOVE ERROR MESSAGES & ALERTS

- Click to the specific meters and correct their billing dates (may have to check invoices). This takes you right to the **Manage Bills (Meter Entries)** page.
 - Click the **Energy** tab. Click the **“Enter Your Bills”** button to open the meter view page.
 - Review for accuracy the **Monthly Entries** section for (b) incorrect usage, and (c) missing or duplicate meters. Be sure to select your **“Display Year”** as the same DQC range, or as **“Show All Years.”**

 **There is not 12 full months of meter data.**

Problem: The following meters do not have 12 full calendar months of meter entries for the year selected (01/01/2024 - 12/31/2024).

- [REDACTED] (missing bills for 07/11/2024 - 01/01/2025)
- [REDACTED] (missing bills for 07/11/2024 - 01/01/2025)
- [REDACTED] (missing bills for 07/11/2024 - 01/01/2025)

What to do:

- If you think this is a mistake, click the links above to review the entries for each meter and make corrections if necessary.

 **Meter(s) with gaps in meter entries.**

Problem: There are gaps (missing days) between meter entries for the following meter(s):

- [REDACTED] (missing data for 07/11/2024 - 12/31/2024)
- [REDACTED] (missing data for 07/11/2024 - 12/31/2024)
- [REDACTED] (missing data for 05/09/2024 - 07/11/2024)
- [REDACTED] (missing data for 07/11/2024 - 12/31/2024)

What to do:

- Click on the meter's name above to view the meter entries and locate the gaps, which will be highlighted in yellow.
- Consult your records and resolve the gaps as needed. For more assistance, please [refer to this FAQ](#).

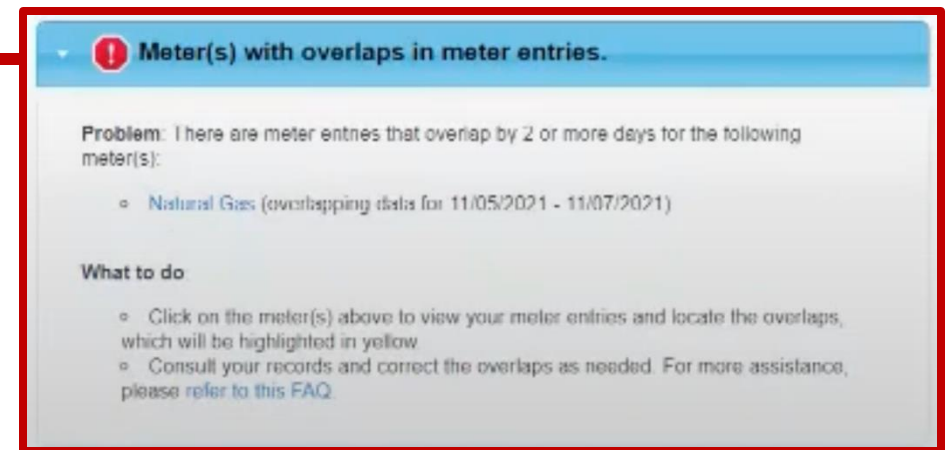
3. ERROR MESSAGES & TROUBLESHOOTING

DATA QUALITY CHECKER (DQC)

DATA QUALITY CHECKER (DQC) ERROR MESSAGES & ALERTS

Meter(s) with gaps in meter entries.

- **Action is needed.**
- Click to the specific meters and correct their billing dates (may have to check invoices). This takes you right to the **Manage Bills (Meter Entries)** page.
 - Click the **Energy** tab. Click the **“Enter Your Bills”** button to open the meter view page.
 - Review for accuracy the:
 - **Basic Meter Information** section for (a) incorrect units.
 - **Monthly Entries** section for (b) incorrect usage, and (c) missing or duplicate meters. Be sure to select your **“Display Year”** as the same DQC range, or as **“Show All Years.”**



3. ERROR MESSAGES & TROUBLESHOOTING

DATA QUALITY CHECKER (DQC)

DATA QUALITY CHECKER (DQC) ERROR MESSAGES & ALERTS

Source EUI appears low OR high.

- **Action may or may not be needed.**
- *When EUI appears either too low OR too high, this may indicate an error.*
- *Review the property's listed GFA (gross square footage) for accuracy.*
 - Go to the **My Portfolio** tab and click the property. Click the **Details** tab, and find the **Basic Information** table to review the **Property GFA - Self-Reported**.
 - If incorrect, click the **"Edit"** button to correct.
- *Review the property's meter data (electricity, natural gas, and / or delivered fuels) for errors: (a) incorrect units, (b) incorrect usage, and (c) missing or duplicate meters.*
 - Go to the **My Portfolio** tab and click the property.
 - Click the **Energy** tab. Click the **"Enter Your Bills"** button to open the **Manage Bills (Meter Entries)** page.
 - Review for accuracy the:
 - **Basic Meter Information** section for (a) incorrect units.
 - **Monthly Entries** section for (b) incorrect usage, and (c) missing or duplicate meters. Be sure to select your **"Display Year"** as the same DQC range, or as **"Show All Years."**

 **Source EUI appears low.**

 **Source EUI appears high.**

Problem: Your property reports a large amount of energy relative to its size. Your building has a Source EUI of [REDACTED] kBtu/ft² while a typical [Hospital \(General Medical & Surgical\)](#) has a Source EUI of approximately 426.3 kBtu/ft².

What to do:

- Double [check the units for your meters](#) to make sure that they match your utility bills. If the units on your utility bill are MBtu [please read this FAQ](#) as you may need to change the unit in Portfolio Manager.
- Double check your meter entries for each individual meter to make sure that all entries match your bills.
- Double check your [Gross Floor Area](#). Refer to [this FAQ](#) for determining what should and should not be included in your GFA.
- If everything is entered correctly, you can ignore this alert.

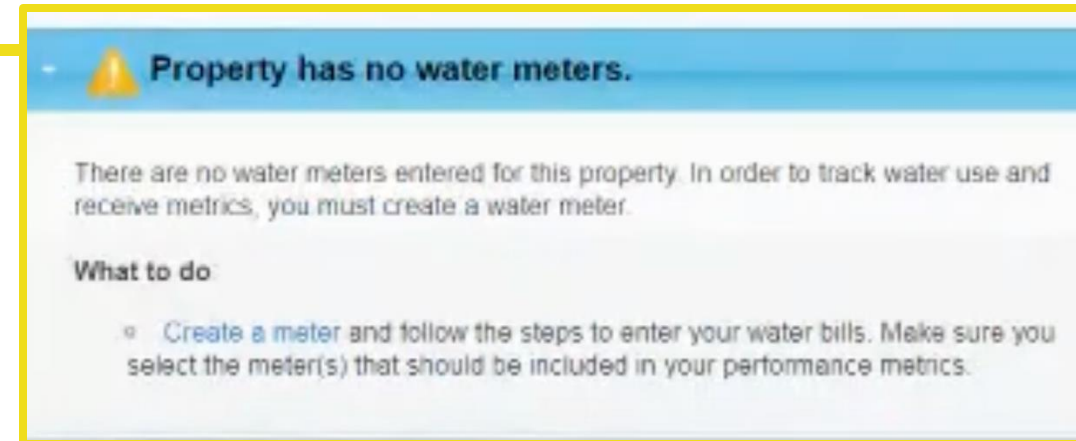
3. ERROR MESSAGES & TROUBLESHOOTING

DATA QUALITY CHECKER (DQC)

DATA QUALITY CHECKER (DQC) ERROR MESSAGES & ALERTS

Property has no water meters. ←

- **Action may or may not be needed.**
- You are not required to include water meters, but if you'd like to:
 - Go to the **MyPortfolio** tab and click the relevant property.
 - Go to the **Water** tab.
 - Click **"Add a Meter."**
 - Choose which type of water meter(s) you're adding (Municipal Potable or Reclaimed, Well Water) and whether the meter(s) are indoor, outdoor, or mixed.
 - Type in # of meters you are adding.
 - Click the **"Get Started."**
 - Add the water meter data into the meter table.
 - Click **"Create Meter."**



3. ERROR MESSAGES & TROUBLESHOOTING

NAVIGATING ENERGY METER INFORMATION

ACCESS THE MANAGE BILLS (METER ENTRIES) PAGE

A. Access the **Manage Bills Meter Entries** Page

- Go to the **My Portfolio** tab and click the property.
- Click the **Energy** tab.
- Access the **Manage Bills (Meter Entries)** page in two ways.
 - a. Find the Meter Summary table and click the **“Enter Your Bills”** button.
 - b. Find the **Meter Name** table and click any meter name link.

My Portfolio | Sharing | Reporting | Recognition

EPA Sample K-12 School
321 Education Way, Phoenix, AZ 85005 | [Map It](#)
Portfolio Manager Property ID: 71047292
Year Built: 1950

[Edit](#)

Energy | Emissions | Water | Waste & Materials | Goals

Meter Summary
3 Energy Meters Total
3 - Used to Compute Metrics
[Add A Meter](#)
Current Energy Date: May 31, 2024
Enter Your Bills

Five Ways to Enter Bill Data
1. Manual ([Instructions here](#))
2. Use our simple spreadsheet (on the bottom of each meter's Manage Bills page) to upload or Copy/Paste
3. Use our complex spreadsheet (multiple meters + multiple properties)
4. Hire an organization to electronically enter your data
5. See if your utility offers this service in the US or Canada.

Your utility, Salt River Project, may be able to send energy data directly to this building record, using Portfolio Manager web services. [Click here](#) for additional information and to see if this option is right for you. If this is what you would like to do, you can [connect](#) with Salt River Project to get the process started.

Remind me Later **Don't show me this again**

Energy Use by Calendar Month (Not Weather Normalized)

(Chart current as of 10/09/2025 07:32 AM EDT)

[Refresh Chart](#) [Export Data by Calendar Month](#)

Meters - Used to Compute Metrics (3)
[Change Meter Selections](#) [View as a Diagram](#) [Add A Meter](#)

Meter Name	Portfolio Manager Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter	286058680	Electric - Grid	06/11/2024	Yes
Electric Solar Meter	286058678	Electric - Solar	06/30/2024	Yes

3. ERROR MESSAGES & TROUBLESHOOTING

NAVIGATING ENERGY METER INFORMATION

VIEW & EDIT THE MANAGE BILLS (METER ENTRIES) PAGE

B. View & Edit the **Manage Bills Meter Entries** Page

- Go to the **Meter Selection** field and click the meter you wish you view.
- Click to expand the **Basic Meter Information** section.
 - Review for (a) meter name and ID, (b) type, (c) units, (d) data meter became active, (e) date meter became inactive (if applicable).
 - If you made any changes, click the “Save Changes” button.
- Click to expand the **Monthly Entries** section.
 - Select either (a) your desired “**Display Year**” or (b) “**Show All Years.**”
 - Review for (a) start and end dates, (b) usage, (c) total cost, (d) utility specific details, and (e) last updated.
 - To make changes, check the box to the left of the desired meter entry. This will make all fields editable. Click the “**Save Bills**” button to save.
- More Options, once you check the box next to specific meter entries:
 - You may also (a) delete selected entries, (b) add another entry, (c) learn how to copy/paste, (d) delete all date. Be careful when deleting!

Manage Bills (Meter Entries) for EPA Sample K-12 School

Meter Selection: Electric Grid Meter - 28...

Basic Meter Information (***click on the arrow to the left to expand this section)

Name: Electric Grid Meter [Delete Meter](#)

Meter ID: 286058680

Type: Electric - Grid [Need to change?](#)

Units: kWh (thousand Watt-hours)

Date Meter became Active: 12/16/2016 [Still In Use](#)

Date Meter became Inactive: [Is this an Aggregate Meter?](#) ☐ No ☐ Yes

Custom Meter IDs: None [Add Another Custom Meter ID](#)

Green power applied to meter: There is no green power being applied to this meter. [Add onsite green power](#)

[Save Changes](#)

Monthly Entries

Display Year(s): 2024

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Demand (kW)	Demand Cost (\$)	Last Updated
☐	12/12/2023	1/11/2024	59,594.5	3,168.14	☐	636	9,189	10/2/24 ckokor
☐	1/12/2024	2/11/2024	59,136	3,304.67	☐	639	9,270	10/2/24 ckokor
☐	2/12/2024	3/11/2024	47,375.5	3,339.47	☐	638	9,209	10/2/24 ckokor
☐	3/12/2024	4/11/2024	41,659.9	3,313.55	☐	636	9,189	10/2/24 ckokor
☐	4/12/2024	5/11/2024	42,664.2	3,267.47	☐	639	9,270	10/2/24 ckokor
☐	5/12/2024	6/11/2024	41,659.9	3,018.19	☐	1,099	16,485	10/2/24 ckokor

[Delete Selected Entries](#) [Add Another Entry](#) [Learn how to copy/paste](#) [Delete All](#) [Delete all data for this meter](#)

[Download to Green Button XML](#) [Download to Excel](#)

3. ERROR MESSAGES & TROUBLESHOOTING

KNOWING WHEN TO...

1. DEVIATE FROM DEFAULT VALUES

- a. When entering data, Portfolio Manager sometimes inputs default values or assumptions (e.g. occupancy hours, # of workers) that are not accurate for your property and can make your data inaccurate.

2. “UPDATE” VS “CORRECT” DATA

- a. “Update with New Information” allows you to track a value that is changing over time and document when that value changed (e.g. you renovated the building, increased occupancy, etc.).
- b. “Correct Mistakes” allows you to change a value that was entered in error (a typo or wrong number).

3. ADD ANOTHER PROPERTY USE FOR A SUB-SECTION OF PROPERTY

- a. If the sub-section accounts for more than ~10-25% of the property's gross floor area (GFA).
- b. If the sub-section is a vacant/unoccupied Office or Medical Office (and is greater than 10% of the property's GFA).
- c. If the sub-section's hours of operation differ by more than 10 hours from the main property section.
- d. NOTE: Be careful not to over-split property types! As this leads to complications in data maintenance and clean up.

4. REACH OUT TO US FOR ASSISTANCE ADDING SOLAR, WIND, BATTERY STORAGE, NET METERING CREDITS, RECS DATA, IF APPLICABLE TO YOUR COMMUNITY.

4. CLOSING RESOURCES

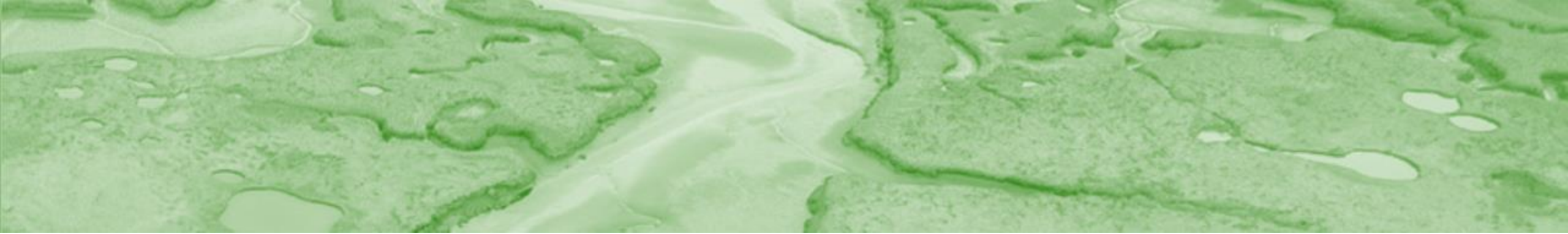
From Portfolio Manager

1. [Energy Star Portfolio Manager Reference Guide](#)
2. [Energy Star Portfolio Manager Glossary](#)
3. [Energy Star Portfolio Manager FAQ](#)
4. [Energy Star Portfolio Manager Other Trainings](#)

From Maine EEPRC Program Team

1. Training Session (I-III) Slide Decks
2. Training Session (I-III) Recordings
3. [Maine EEPRC Community Report Template](#)





COMMUNITY LIAISON TAKE-AWAY TASK

1. **Accounts Set Up:** Help other key Community employees create Portfolio Manager Individual accounts and connect them with the Community account.
2. **Community Maintenance & Reporting Protocol:** Create a maintenance and reporting protocol for your Community's Portfolio Manager information.
3. **Office Hours:** Attend a session for help with set up and answering questions.
 - *Thurs. Oct. 16th 2025 at 12-1:00pm*
 - *Thurs. Oct. 23rd 2025 at 12-1:00pm*