

JANUARY 2022

*Guide to Using ENERGY STAR  
Portfolio Manager in the Context of the  
City of Montréal's Bylaw 21-042 on the  
Mandatory Disclosure of Energy  
Consumption Data.*

Montréal 

# Glossary

BTER	Bureau de la transition écologique et de la résilience (the City of Montréal's Office of ecological transition and resilience)
CIET	Canadian Institute for Energy Training
BEC	Building Energy Challenge
EPA	Environmental Protection Agency
ESPM	ENERGY STAR Portfolio Manager
NRCan	Natural Resources Canada

# Table of Contents

<b>Caution</b>	2
<b>Background</b>	2
<b>User's Guide to the ESPM tool</b>	3
ENERGY STAR Portfolio Manager	3
Information required to begin data entry	3
Create an ESPM account	4
Adding a property	6
Configuring a property	11
Adding meters and Entering energy consumption data	12
Error-checking your data	18
Disclosing your data to the City	19
Sharing a property	21
Transferring a property	23
Campus mode	25
Updating properties and correcting data	28
<b>Frequently asked questions</b>	32
<b>Additional sources of information</b>	37
<b>Appendix I</b>	38

## Caution

This document is a step-by-step tutorial on how to use the ENERGY STAR Portfolio Manager® (ESPM) tool in the context of applying the By-Law. It is intended for owners and managers of existing buildings in the commercial, institutional and residential sectors (multi-unit or mixed-use buildings) subject to the By-Law and wishing to use the ESPM platform.

This document goes hand in hand with the City<sup>1</sup> of Montréal's Application Guide to the By-Law which can be found [here](#). The present guide adds to the many resources already available, such as the training sessions organized by the Building Energy Challenge (BEC) in collaboration with the City of Montréal, the ENERGY STAR Portfolio Manager training sessions organized by Natural Resources Canada (NRCan) through the Canadian Institute for Energy Training (CIET) and the various recorded webinars organized by ENERGY STAR Portfolio Manager (ESPM), available on their [website](#).

This guide has no legal value and the French-language regulatory version of By-law 21-042 published by the City of Montréal takes precedence.

## Background

In September 2018, the City of Montréal signed the One Planet Charter reaffirming its determination to continue its commitment to four specific areas of climate change action, including achieving carbon neutrality by 2050. This commitment was reaffirmed in the City of Montréal's 2020-2030 Climate Plan, which proposes 46 actions, grouped into five sectors of intervention, to be implemented by 2030. One of the actions in the Buildings program aims to improve the energy performance of large buildings through a rating and disclosure system for their energy consumption and GHG emissions.

On September 27, 2021, the City of Montréal adopted the *By-law on the Disclosure and Rating of Greenhouse Gas Emissions of Large Buildings* (By-Law 21-042) to encourage owners of existing buildings in the commercial, institutional and multi-residential sectors to improve their energy efficiency and reduce their emissions.

Although the City of Montréal is a pioneer in the fight against climate change with the adoption of such a by-law, its experience is not unique. Indeed, in the past few years, dozens of voluntary and mandatory energy disclosure initiatives have been developed at different levels by various political and regulatory bodies. In the United States, nearly 40 cities and four states<sup>2</sup> have adopted policies or by-laws requiring the disclosure of building energy data.

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<sup>1</sup> To improve the readability of this English-language text, the municipality legally known as Ville de Montréal will be referred to herein as the City of Montréal or the City

<sup>2</sup> Including the cities of New York, Philadelphia and Chicago as well as the states of Washington and California

In Canada, there are also a number of data disclosure initiatives, but they are largely voluntary. The Building Energy Challenge<sup>3</sup> (BEC) is an example. This voluntary energy consumption and GHG emissions disclosure initiative was launched by BOMA Québec in 2018 and is ongoing. In the BEC's third year, the 179 participating buildings demonstrated an average GHG emission reduction of 18%<sup>4</sup>.

Prior to the City of Montréal's adoption of the By-Law, only the province of Ontario had a mandatory energy disclosure initiative. In fact, Ontario passed the Energy and Water Reporting and Benchmarking (EWRB) regulation in 2017, which requires the collection of energy and water consumption data for office buildings and buildings that are used for multi-residential, commercial and industrial purposes<sup>5</sup>.

## User's Guide to the ESPM tool

### ENERGY STAR Portfolio Manager

ENERGY STAR Portfolio Manager (ESPM) is an energy management tool, created by the Environmental Protection Agency (EPA) and introduced in Canada in 2013 by Natural Resources Canada (NRCan), which allows you to track and manage the energy consumption of your entire building portfolio in a secure online environment.

ESPM may be used completely free of charge. It offers weather-normalized energy intensity values, greenhouse gas emission measurements, reporting features that help you track trends over time, and energy performance ratings from 1 to 100 for qualifying building types, called ENERGY STAR ratings.

## Information required to begin data entry

### **Basic information**

- Name, street address, postal code
- Year of construction
- Types of building use (primary uses)
- Floor area by type of use

### **At least 12 months of consecutive energy consumption data required to meet your regulatory obligations**

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<sup>3</sup> The Building Energy Challenge <https://buildingenergychallenge.ca/>

<sup>4</sup> 2020 (2021) Data Disclosure Report (in French). BOMA Québec. [https://defienergie.ca/wp-content/uploads/2021/03/2020-Rapport-public\\_210318.pdf](https://defienergie.ca/wp-content/uploads/2021/03/2020-Rapport-public_210318.pdf)

<sup>5</sup> Government of Ontario, Regulation 506/18:



- This means all your energy bills such as electricity, natural gas, heating oil, diesel and any others. They are property-specific and cover all energy sources purchased and consumed on site.

### **Details of use(s) of your property**

Among other things:

- For multi-unit residential or mixed-use buildings, the number of dwelling units.

## Create an ESPM account

This section is for people who do not yet have an ESPM account.

1. Go to the page <https://portfoliomanager.energystar.gov/pm/>

ENERGY STAR®  
PortfolioManager®

Help  
Language: English | Français

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

Username: \*

Password: \*

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

**Create a New Account**

**ENERGY STAR Buildings Homepage**

**Take a Training**

**Learn More About Portfolio Manager**

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

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

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2. Click on "Create a New Account".
3. Complete the "About Yourself" section. This section must be filled out with the account manager's information, which may be different from the building owner's information.

**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/ft<sup>2</sup>)

☒ Metric Units (e.g., GJ/m<sup>2</sup>)

Be sure to choose  
metric units.

4. Answering “yes” to the following question will allow other users to easily find you through ESPM.

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

5. Once you have entered your information, click on "Create my account". A few minutes later, you should receive an email to “Activate Your Portfolio Manager Account”. Open this email and click on the included web link to verify your email address. NOTE: It may take some minutes or hours before your account is activated. You should log in to your account within 24 hours. Otherwise, you will have to start the account creation process again.

## Adding a property

1. In the MyPortfolio tab, click on “Add a Property”.



2. The “**Set up a Property: Let's Get Started!**” page appears as shown on the next page. The first step is to select the type of property that represents the majority use (more than 50%) of your building from the types of use presented in the drop-down list. This list is consistent with the list included in Section II of Schedule A of the City of Montréal’s by-law (also shown in Appendix I of this document). In some categories, choosing “Other” reveals a list of subcategories. Be sure to select the type that is most applicable to your building.

**Caution:** Type “Other” should only be used in when no type of use from this list applies.



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

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



### Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

[Learn more about Property Types.](#)



#### Tip

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



### Your Property's Buildings

How many physical buildings do you consider part of your property?

- ☐ **None:** My property is part of a building (e.g., a Tenant Space)
- ☐ **One:** My property is a single building
- ☐ **More than One:** My property includes multiple buildings ([Campus Guidance](#))

How many?



#### Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.



### Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

- ☒ **Existing:** My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
- ☐ **Design Project:** My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
- ☐ **Test Property:** This is not a real property. I am entering it to test features, or for other purposes such as training.



#### Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

**Get Started!**

[Cancel](#)

3. The next step is to classify the property as either a single building or a group of buildings.
4. It's best if disclosure is done separately for each building. In certain cases, several buildings may be combined into one property. If the uses are different but do not COMBINE to form a single use such as a campus, (e.g., residences, university), you will need to disclose each building separately, using either sub-metering or calculated energy assumptions. If this is truly a CAMPUS as defined by ENERGY STAR, then select "**More than one**" to be able to disclose your information as a "**Campus**". Please refer to the [Campus section](#).
5. Under Construction Status, select "**Existing**", as only existing buildings are subject to Montréal's By-Law. Once you have entered all the information, click on "**Get Started!**".

6. The “**Set Up a Property: Basic Property Information**” page appears (as shown below). Fill in your building information as shown.

- In the “**Gross Floor Area**” box, make sure to enter the correct number corresponding to the:

“Sum of the floor space in square metres measured between the outer cladding of the exterior walls of the building, including all common areas, but excluding the area of interior parking spaces, any exterior or not-completely-enclosed space, and crawl spaces.” (City of Montréal By-Law 21-042, art.2)

The year of construction corresponds to the year of the original construction of the building or of its major renovation (for more precision, refer to the definition of ESPM in the Glossary)

- Be sure to choose the right units. For regulatory purposes, the metric unit is used, so the area must be reported in **square metres**. The building’s floor area is the gross floor area in square metres, measured from the outside walls of the building, and is not the rentable area. Basement areas other than crawl spaces must also be included in the calculation. Refer to the Guide to the By-Law for more details.
- The irrigated area is not a required data item.
- Occupancy is not data that's reported to the City, but it is required by ESPM in order to pursue the creation of properties.
- If a building has two different addresses in official use, the second address line in ESPM should be used. However, only one postal code can be used, that of the address entered in the first line. Enter each address as follows: **Street number, street name**.

## Set Up a Property: Basic Property Information

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

### About Your Property

Name: \*

Country: \*

Street Address: \*

City/Municipality: \*

County:

State/Province: \*

Postal Code: \*

Year Built: \*

Gross Floor Area: \*  Sq. Ft.  ☐ Temporary Value  
Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. [Details on what to include.](#)

Irrigated Area:  Sq. Ft.

Occupancy: \*  %

7. The standard ID (entered in the box shown below) will not be required until the second year of disclosure to the City. After your first year of disclosure, the City will issue you a building ID number. The standard ID box should therefore not be checked in the first year. Once you have received your unique ID, simply go to the property's Details tab and, under Unique Identifiers, click the Edit button, then under Standard IDs, click the Edit button, and select the standard ID type "**Montréal - Disclosure Building ID**" from the drop-down list. You can then enter the unique identifier sent to you by the City.
  - The identifier then remains linked to the building, even if it is bought or sold.
  - If you have multiple buildings on your property and the declaration is made as a "Campus", the City of Montréal will assign a single identifier for your entire property.

**Standard IDs**

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

**Standard ID(s):**

ID:

[+ Add Another](#)

8. Select the items that apply to your situation in the following section. These answers will help ESPM guide you in entering your energy data. Once you have entered the information, click on “Continue”.
- 9.

**Do any of these apply?**

- ☐ My property's energy consumption includes [parking](#) areas
- ☐ My property has a [Data Center](#) that requires a constant power load of 75 kW or more
- ☐ My property has one or more retail stores ([that are eligible for a Retail score](#))
- ☐ My property has one or more restaurants/cafeterias
- ☐ My property has a trading floor

After you have finished creating your property, click on its “Details” tab to add the owner's name.


10. There is currently no field to enter the owner's name, so it must be entered in the “Unique identifiers” section. Click the Edit button.

**Unique Identifiers (IDs)**

**Portfolio Manager ID:**  
20599689

**Custom IDs:** None

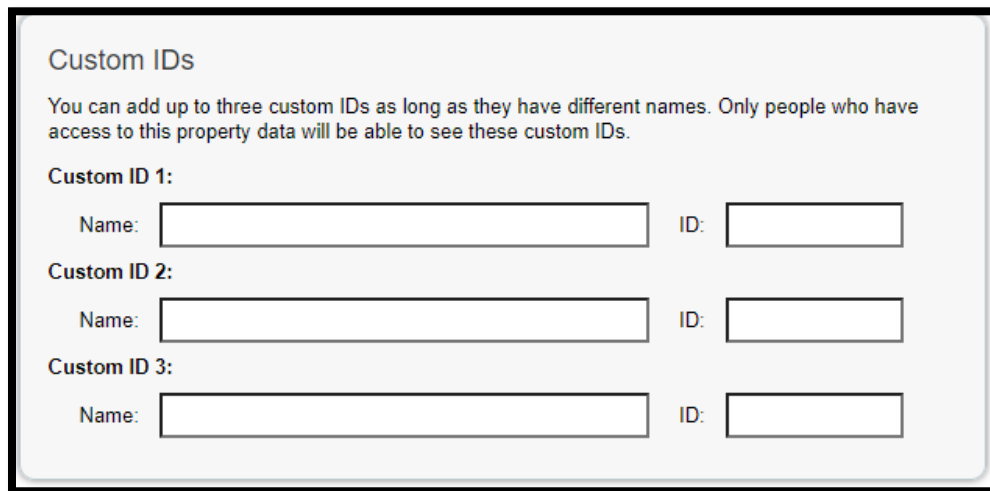
**Standard IDs:** None

 You can select from Portfolio Manager's **Standard IDs** to provide information to others in data requests. Or you can create up to three **Custom IDs** so that you can cross reference your property in other systems.

[Edit](#)

11. Then proceed as follows:

- Under Custom ID 1:
  - In the “Name” box, enter the owner's name (4000 characters maximum). If there is more than one owner, one owner must be designated as the representative as per the by-law.
  - In the “ID” box, enter the owner's email address (1000 characters possible). The email address must be one that is read and used frequently.



The screenshot shows a web form titled "Custom IDs". Below the title is a note: "You can add up to three custom IDs as long as they have different names. Only people who have access to this property data will be able to see these custom IDs." There are three sections, each labeled "Custom ID 1:", "Custom ID 2:", and "Custom ID 3:". Each section contains two input fields: "Name:" and "ID:". The "Name" fields are wider than the "ID" fields.

## Configuring a property

1. The “**Configure a property: How is it used?**” page is displayed (excerpt shown below). Using the drop-down “Add Another Type of Use” list, specify each additional type of building use from the list in Schedule A of the By-Law, which is also included in this guide as Appendix I. Scroll down and specify the square footage for each type of use in the appropriate Property Use Detail section.
  - If this is a multi-unit building, specify the number of units by choosing the situation that best describes you (building of 1 to 4 floors, 5 to 9 floors, etc.)
  - Types of use representing less than 10% of the total area do not have to be reported, but their area must then be combined with a reported use type.

**Caution** the sum of the gross areas assigned to each use must correspond to the self-reported gross area, as entered on the Basic Property Information page, otherwise ESPM will display an error message.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* <input type="text"/> Sq. Ft. ▼	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
★ Total Number of Residential Living Units	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Low-rise Building (1-4 stories)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Mid-rise Building (5-9 stories)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a High-rise Building (10 or more stories)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
★ Number of Bedrooms	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
★ Common Entrance	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
Resident Population Type	<input type="text"/>	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
Government Subsidized Housing	<input type="text"/>	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
Number of Laundry Hookups in All Units	<input type="text"/>	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
Number of Laundry Hookups in Common Area(s)	<input type="text"/>	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2004"/>	<input type="checkbox"/>

For each type of use, **only** the gross floor area information will be provided to the City of Montréal. However, it is **STRONGLY** recommended to enter the maximum amount of information possible, to make the best use of ESPM for energy monitoring and certification applications. Wherever you check a “Use a default” box, ESPM will use known standards to perform its calculations.

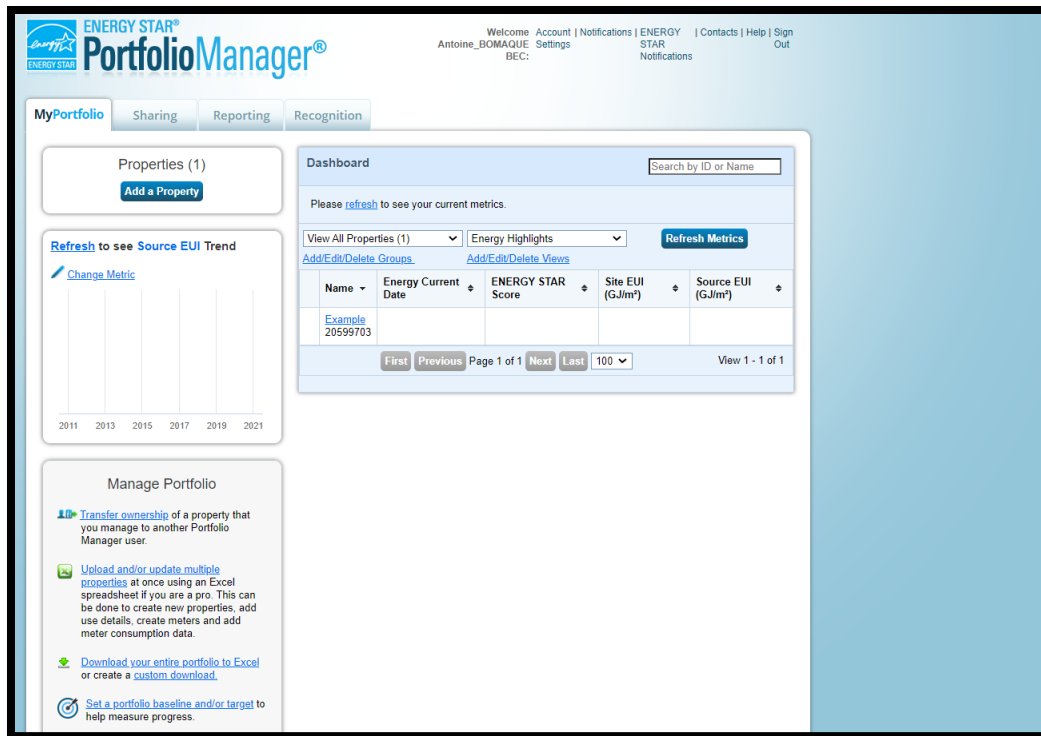
Please note that any information not requested by the City will not be forwarded to the City.

When you have entered all your information, at the bottom of the page, click the “Add Property” button to complete the entry of your property. The next step is to enter your energy consumption data.

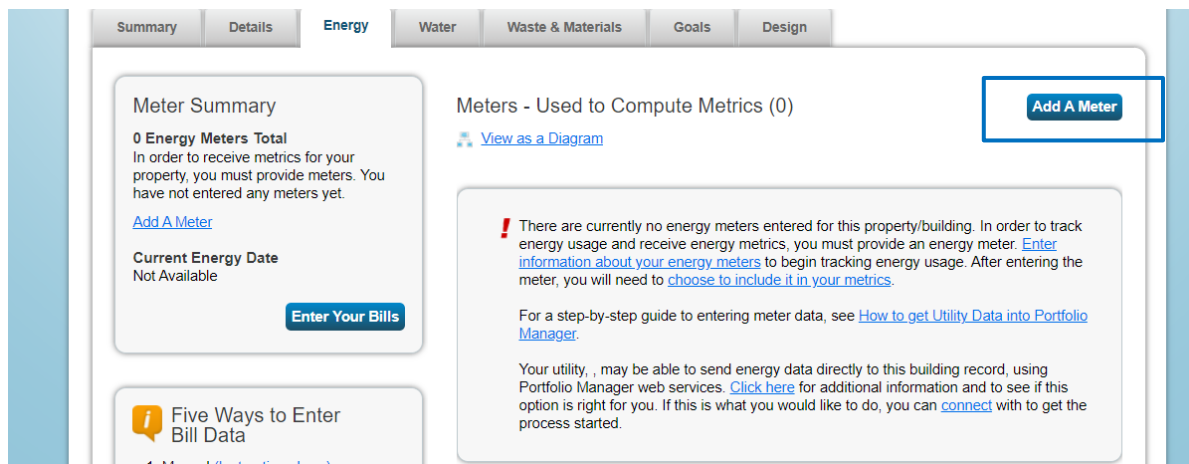
## Adding meters and Entering energy consumption data

- In the MyPortfolio tab, in the Dashboard area (shown in the following image), click on a property name:

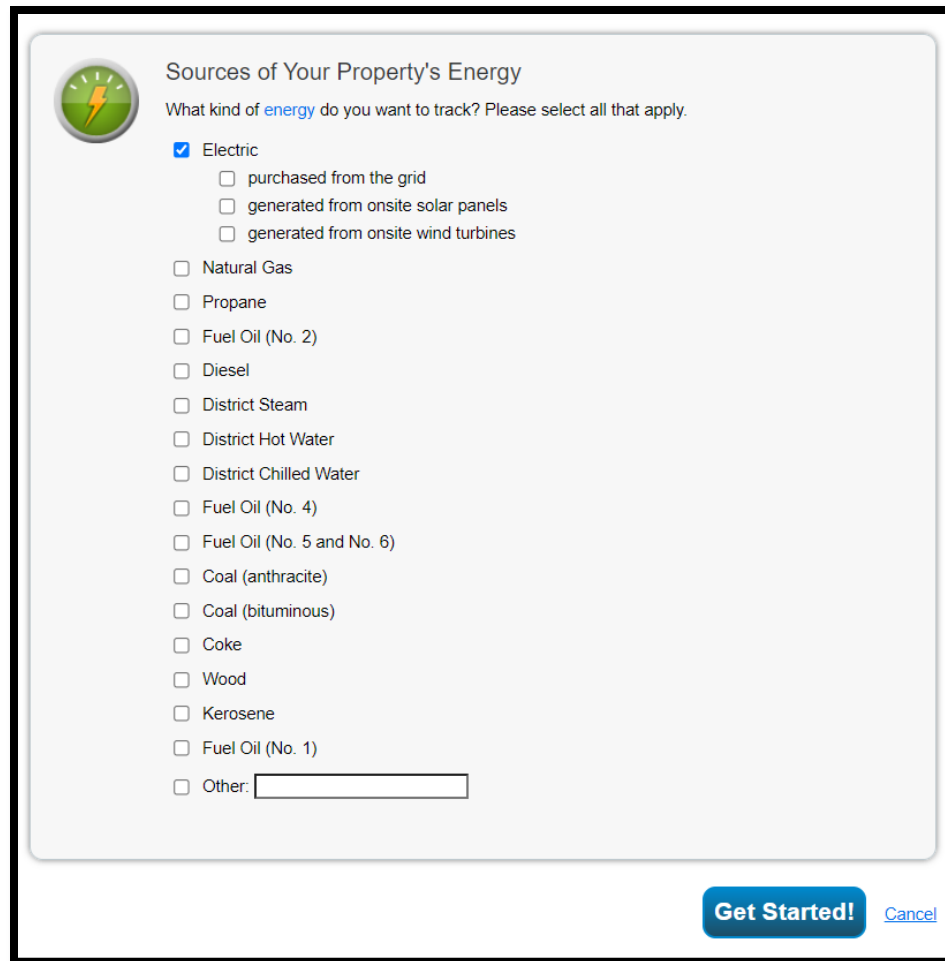




- In the Energy tab, click the “Add a meter” button:



- Select the energy sources consumed in your building (see following screen image), enter the number of meters for each and click on "Get Started!".
- The Other category is reserved exclusively for the consumption of renewable natural gas. If used, it should be named as follows:  
**RNG (Renewable natural gas).**



**Sources of Your Property's Energy**

What kind of **energy** do you want to track? Please select all that apply.

☒ Electric

- ☐ purchased from the grid
- ☐ generated from onsite solar panels
- ☐ generated from onsite wind turbines

☐ Natural Gas

☐ Propane

☐ Fuel Oil (No. 2)

☐ Diesel

☐ District Steam

☐ District Hot Water

☐ District Chilled Water

☐ Fuel Oil (No. 4)

☐ Fuel Oil (No. 5 and No. 6)

☐ Coal (anthracite)

☐ Coal (bituminous)

☐ Coke

☐ Wood

☐ Kerosene

☐ Fuel Oil (No. 1)

☐ Other:

**Get Started!** [Cancel](#)

- On the "About Your Meters" page (shown below), click anywhere in the table to fill in or modify fields. Drag the scroll bar left and right to see more fields. You can change the name of the meter if desired. For electric meters in Montréal, set the Units to kWh.
- The "**Date Meter became Active**" can be the date the building construction was completed. It can also be the first day included in your first energy bill. Check "In Use" for any meter currently in use.
- If a meter change occurs within a certain period of time, it will be important to indicate the "**Date Meter became Inactive**" and specify the date the new meter became active and the old one inactive. (Click "Add Another Entry" to add a new meter.) ESPM will report an error if the dates do not match or overlap (the activation date of the new meter must equal the day after the inactivation date of the old meter).
- If an energy is manually delivered to you (such as oil, wood, etc.), check the "**Enter as delivery**" box.

**ENERGY STAR® PortfolioManager®**

Welcome | Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out  
 del\_bomaquebec: Settings | Notifications

### About Your Meters for Example

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.

**1 Energy Meter for Example (click table to edit)**

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Meter ID 1 Name
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		<input type="checkbox"/>	

[Delete Selected Entries](#)  
[Add Another Entry](#)

[Back](#)
[Create Meters](#)
[Cancel](#)

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- Once you have entered all the information, click on "Create Meters", and the "Your Meter Entries for Building Name" page will appear and you can enter energy data.
- To enter energy consumption data later, from the Dashboard, select any property, then click the Energy tab to view the list of meters.
- Click "Click to add an entry", then, as on the previous page, click anywhere on the table to activate the fill-in fields. All fields must be completed including total energy costs including taxes (excluding late payment costs).

"The billing period, the quantity received and the cost must be indicated even if the billing is before or after the year covered by the disclosure, as long as the quantity received was used during the year covered by the disclosure."  
 (City of Montréal, By-Law 21-042, Schedule A)

- For electric meters (see sample image below), it will be mandatory to fill in the electrical power demand (kW) per billing period, corresponding to the billing demand. ESPM provides a field for the kW cost of the demand. **This information is not required by the By-Law.**

- The “**Estimation**” field is only checked when entering estimated values, which should never be the case for disclosure to the City of Montréal.

**Caution:** When you fill in the start date, the end date is automatically generated, so take the time to check your dates and make changes if necessary.

Energy data can also be uploaded by filling in an Excel template. Obtain the template by clicking on “**single-meter spreadsheet**”, then enter the information and save the spreadsheet. When all the required columns are filled in, upload the file by clicking on “Choose file” and then “**Upload**”.

**Caution:** The format of the ESPM template must be respected otherwise it cannot be imported.

**Electric Grid Meter**

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

[Delete Selected Entries](#)  
[Add Another Entry](#)  
[Learn how to copy/paste](#)

Upload data in bulk for this meter:

Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

[Cancel](#)

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- For energies that are delivered, provide the requested information, i.e., delivery date, quantity delivered and associated cost including taxes for each delivery.

Energy Meter(s) for Example

▼ Fuel Oil (No. 2)

Delivery Date	Quantity Gallons (US)	Total Cost (\$)	Estimation
<a href="#">Click to add an entry</a>			
<p>✖ <a href="#">Delete Selected Entries</a></p> <p>✚ <a href="#">Add Another Entry</a></p> <p>📄 <a href="#">Learn how to copy/paste</a></p>			
<p>Upload data in bulk for this meter:</p> <p>📄 Use this <a href="#">single-meter spreadsheet</a> to:</p> <ul style="list-style-type: none"> <li>• Upload the completed file below</li> <li>• <a href="#">Copy and Paste the data into the table above</a></li> </ul>			
<p> <input type="button" value="Choisir un fichier"/> <input type="text" value="Aucun fichier choisi"/> <input type="button" value="Upload"/> </p>			

[Continue](#) [Cancel](#)

It is also possible to consider solar and wind energy produced, consumed and sold. In Step 3, select the box that pertains to your situation "generated on-site with my own solar panels" or "generated on-site with my own wind turbines".

You will follow the same steps explained above. For electrical energy sold, but produced on site, a negative consumption will have to be entered for the quantity sold in the “**Energy exported off site**” section.

▼ Electric Solar Meter

	Start Date	End Date	Energy Used On Site kWh (thousand Watt-hours)	Energy Exported Offsite kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	REC Ownership
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

If you use an energy (thermal) distribution network:

- Click on the “Details” tab and enter the name of the network owner in "Property Notes" at the bottom of the page. This section can also be used to add any other relevant information.


Additional Information

**Federal Property:**  
Not Set

**Institutional Property:**  
No

**Service & Product Provider:**  
None ([Find a SPP](#)) [Edit](#)

[Delete this Property](#)

 Caution! Deleting your property is permanent.

Property Notes

Use the following area to keep notes on your property.

You have 1000 characters remaining for your notes.

[Save Notes](#)

## Error-checking your data

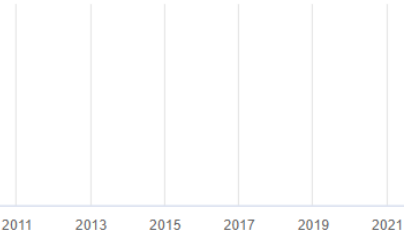
It is strongly recommended that each time you enter energy data, you validate the entries. ESPM allows you to validate your entries for a given year with its **“Check for Possible Errors”** option.

1. Open a property, click on the **“Summary”** tab, and below the metrics summary, click on **“Check for Possible Errors”**.

[Summary](#)
[Details](#)
[! Energy](#)
[Water](#)
[Waste & Materials](#)
[Goals](#)
[Design](#)

[Refresh](#) to see [Source EUI](#) Trend





[Change Metric](#)



2011 2013 2015 2017 2019 2021

[Change Metrics](#)

[Change Time Periods](#)

Metric 	Not Available (Energy Baseline) 	Not Available (Energy Current) 	Change 
<a href="#">ENERGY STAR Score (1-100)</a>	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
<a href="#">Source EUI (GJ/m²)</a>	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
<a href="#">Site EUI (GJ/m²)</a>	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
<a href="#">Energy Cost (\$)</a>	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
<a href="#">Total GHG Emissions Intensity (kgCO2e/m²)</a>	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
<a href="#">Water Use (All Water Sources) (m³)</a>	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
<a href="#">Total Waste (Disposed and Diverted) (Metric Tons)</a>	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A

**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](#)



2. A new page entitled “**Data Quality Checker for *Building Name***” opens. Select the year-end date for which you want to verify your information, then press “**Run Checker**”.

The screenshot shows a web interface with a navigation bar at the top containing 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main heading is 'Data Quality Checker for [Example](#)'. Below this, a paragraph explains the tool's purpose: 'The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your year of interest, review your alerts, and follow the links to view or correct your data as needed.' A central form titled 'Select Timeframe & Run Checker' contains instructions: '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.' The form has a 'Year Ending:' label, a dropdown menu with a red asterisk, and a 'Run Checker' button. To the right, an 'About Timeframes' section with an information icon explains that the tool needs one full calendar year of 'Property Use Details' and 'meter' information. At the bottom of the form is a 'Cancel' link. The footer includes 'Follow Us' with social media icons, and a row of links: 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

- A green thumb means that the system has not detected any errors.
- An exclamation mark in a yellow triangle indicates atypical data, such as abnormally high or low values. If you receive such an alert, but you know the information is correct, you can ignore it.
- An exclamation point in a red octagon indicates incomplete or missing data.

## Disclosing your data to the City

After entering your energy data and all the information required by the City and error-checking your data, the final step is to generate the final report to be provided to the City as required by the By-Law.

1. Follow this URL link : [2021 data request from the City of Montréal](#). This direct link direct will redirect you to the “Respond to a Data Request” page of the ESPM tool. Note that each year the City will provide you with a new link to use.

About Your Response

Who is this data being submitted on behalf of?

☐ myself

☒ someone else

\* - Select a contact - [Add a Contact](#)

2. In the “**About Your Response**” section, specify who is responding to this data request. If you are responding on behalf of another person, please select that person's name in the contact field.
3. Then select the properties for which you wish to submit data. Click “Select Properties”, check the box for each property on which to report, then scroll to the bottom and click “Apply Selection”.

Your Response

Select Information to Include:

Timeframe: \* Single Year Dec 31 2021

If the data requestor has specified a timeframe for the request, you will not be able to change it.

Properties: \* [Select Properties](#) [Selected Properties: 0](#)

The data requestor may have asked for one or more [standard IDs](#) to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response.

4. After selecting the properties, Click “Generate Response Preview”. You will be directed to the “Reporting” tab. In the “**Action**” drop-down list for the annual report, select:
  - click on “**Preview Response**” or “**Download Preview to Excel**” to see a preview of the data report that will be sent (click “Close” to return to the Action list) and “**Send Response**” to proceed with sending your data.

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

Your new response preview(s) has been generated.

Name	Status	Action
Demande de données : Montréal Divulgarion année 2021 - Règlement 21-042 (Request from Ville de Montréal Bureau de la transition écologique et de la résilience)	<b>Response Preview Generated:</b> 4/10/2022 3:56 PM No errors found	I want to... I want to... Edit Properties and Timeframe Preview Response Download Preview in Excel Generate an Updated Response Send Response Delete Response
Demande de données :Template test 1 (Request from Défi Énergie en Immobilier)	<b>Closed:</b> 9/28/2021 1:16 PM	
▶ Demande de données :Détail_Mensuel_2021 (Request from Défi Énergie en Immobilier)	In Progress ( <a href="#">expand</a> row to see response statuses)	
▶ Demande de données :Template test 1 (Request from Défi Énergie en Immobilier)	In Progress ( <a href="#">expand</a> row to see response statuses)	I want to...

First
Previous
Page 1 of 1
Next
Last
10

- Complete the "Confirm Response Data Request from Ville de Montréal Bureau de la transition écologique et de la résilience (Ville de Montréal)" form, e-sign the response, then click the "Send Data" button. The response will be sent to the City of Montréal's BTER office.
- Save the Portfolio Manager auto-response email in your files. This is your annual proof of disclosure.

**Caution:** If you change any of the required data after submitting it, you will need to redo these steps. If a change is made before June 30, the previously submitted data will be overwritten by the new data. After June 30, an email should be sent to [divulgarion\\_cotation@montreal.ca](mailto:divulgarion_cotation@montreal.ca) to request a new link (another URL link will be sent to you).

For more information, see the guide [How to Respond to Data Requests in Portfolio Manager®](#).

## Sharing a property

### Using the "Share" feature

Property sharing is a key feature of ESPM; it allows a third party to have access to your properties, to verify your data entries and to provide assistance. It also enables you to easily share your data in an informative way with any of your ESPM contacts.

Some initiatives, such as the Building Energy Challenge (BEC), also require all participants to share their properties with the Challenge account.

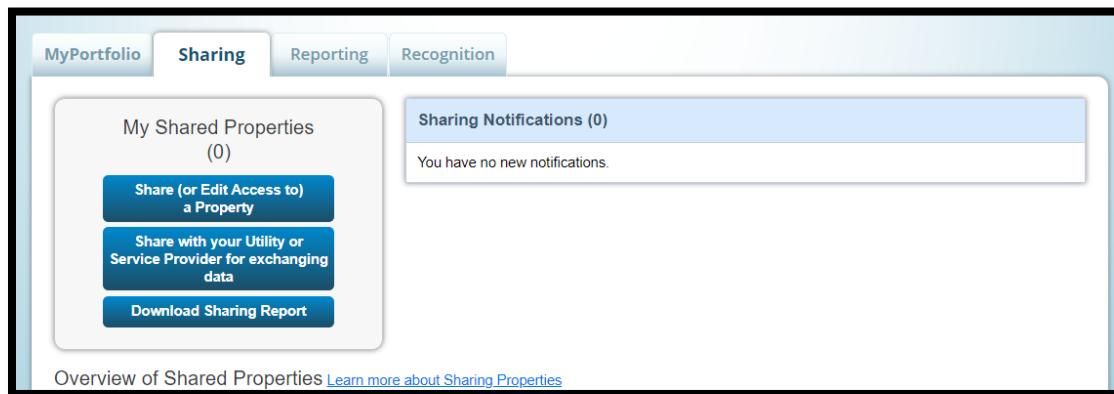
In addition, if you are a tenant and have a separate meter from the rest of the building, you can register your space individually and then share your space with your building owner as long as they also have an ESPM account.

In the case of divided condominiums, for example, it is preferable to agree on a common way of naming all the spaces, so as to facilitate the recognition of the relationship with the other owners.

For example:

- 100 Main Street - Suite 100
- 100 Main Street - Suite 200

1. In the “Sharing” tab, click on **“Share (or Edit Access to) a Property”**.



2. The “**Share (or Edit Access to) Properties**” page opens, and you can select the properties to share and the accounts that will have access to them.

The screenshot shows the 'Share (or Edit Access to) Properties' page in the Energy Star Portfolio Manager interface. The page has a navigation bar with tabs: 'MyPortfolio', 'Sharing' (active), 'Reporting', and 'Recognition'. The main heading is 'Share (or Edit Access to) Properties'. Below the heading is a paragraph explaining the purpose of the page. The page is divided into two main sections: 'Select Properties' and 'Select People (Accounts)'. The 'Select Properties' section has a blue icon with the number 1 and a 'Select Properties' button. The 'Select People (Accounts)' section has a blue icon with the number 2 and a text box for selecting contacts. On the right side, there are three informational boxes: 'Sharing with Accounts', 'Exchanging Data with Web Service Providers?', and 'Who gets to Share Forward?'. The 'Who gets to Share Forward?' box lists three options: 'Full Access', 'Read Only', and 'Custom'.

- To add a contact:
  - Click on “**Contacts**” at the top right of the page to display the My Contacts and Organizations page. Click “**Add New Contacts/Connections**” and follow the instructions shown.



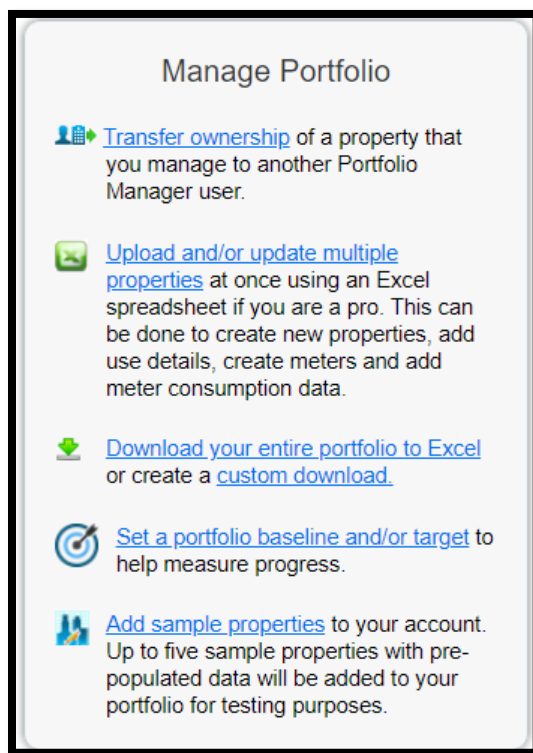
## Transferring a property

### Using the “Transfer” option

Transfer of ownership is an ESPM option that allows you to transfer ownership of a property from one account to another, for example when selling the property or changing management responsibilities. Each property is assigned to an administrator who is the only one who can transfer a property from his account to another.

**Caution:** Once the property is transferred, you will no longer have access to it from your account.

1. In the “MyPortfolio” tab, under Manage Portfolio at the bottom left of your screen, click on “**Transfer ownership**”.



2. The “**Transfer Ownership of Your Property**” page appears, and you can select which properties to transfer and to which account.

A screenshot of the 'Transfer Ownership of Your Property' page. The page has a header with tabs: 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main title is 'Transfer Ownership of Your Property'. Below the title is a paragraph: 'You may want to transfer ownership of your property to another person if you are no longer going to manage the property in Portfolio Manager. In order to transfer the property, the other person must have an account and be a connected contact.' There are two numbered steps: 1. 'Select Properties to Include:' with a 'Properties:' label, a 'Select Properties' button, and 'Selected Properties: 0'. 2. 'Select Person (Account) to Transfer to' with the text 'Which person (account) do you want to transfer this property to?' and 'Select contact from my contacts book:'. Below this is a dropdown menu with '- Select a contact -'. To the right of the steps is a section titled 'Transfer to a Connected Contact' with an information icon. It contains the text: 'The person that you are transferring your property to must be one of your connected contacts. If the person is not connected to you, you can always connect with them.' and a row of dots. At the bottom are two buttons: 'Transfer Property' and 'Cancel'. The footer has 'Follow Us' with social media icons and a row of links: 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.



## Campus mode

In the ENERGY STAR Portfolio Manager tool, you can create a property consisting of one individual building and track its performance. It is also possible to create a “campus” (a property composed of several buildings), and to follow the energy performance of these buildings individually and collectively.

The campus mode should only be used in cases where there is no sub-meter and a credible energy distribution assumption cannot be made, and not used to simplify data entry. After creation, campuses will be thoroughly audited.

Before using the campus mode, answer the following four questions:

1. Do you only know the energy consumption of the campus (a set of several buildings connected together energy-wise) as a whole?
2. Do you only have some of the energy information for individual buildings on campus (called “child properties”)?

If you answered Yes to one of these two questions, continue, otherwise declare the buildings individually.

3. Can you do an energy audit to determine the percentage of consumption of each of the “child” buildings?
4. Is it possible to make a credible assumption of energy distribution between buildings?

If you answered No to both questions 3 and 4 and have evidence that it is impossible, you can disclose the information as a campus.

When using this method, individual buildings will still need to be defined in terms of their use types and associated areas (the name of the building should be its address).

1. On the “**Set up a Property: Let’s Get Started!**” page (see below), in the “**Your Property’s Buildings**” section, select the “**More than one:** My property includes multiple buildings” option. Enter the total number of buildings in the box provided. If you already created a property with one building, there is no need to delete it; you just need to click on “**Add a Property**” in “MyPortfolio ” and select “**More than one**”. You can then combine together the buildings on your property that were created separately.

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

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



### Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

[Learn more about Property Types.](#)



#### Tip

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



### Your Property's Buildings

How many physical buildings do you consider part of your property?

- ☐ **None:** My property is part of a building (e.g., a Tenant Space)
- ☐ **One:** My property is a single building
- ☐ **More than One:** My property includes multiple buildings ([Campus Guidance](#))

How many?



#### Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.



### Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

- ☒ **Existing:** My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
- ☐ **Design Project:** My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
- ☐ **Test Property:** This is not a real property. I am entering it to test features, or for other purposes such as training.



#### Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

**Get Started!**

[Cancel](#)

2. Next, in the **"Set Up a Property: Basic Property Information"** page, enter the information for the entire campus. In other words, the Gross Floor Area that you will enter must be the sum of the floor areas of the different buildings that make up your property. The same logic must be followed for each type of use and the corresponding area; you must consider all your different buildings as one.
3. Once you have completely entered your property specifications, a new section entitled "Individual Buildings on this Property" will appear in the "Summary" tab of your campus property. Click on **"Add a Building"** (see below) if you wish to add additional buildings to 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

**Individual Buildings on this Property (0)**

Add a Building

 **More About Individual Buildings**

This property is a multi-building property, and you haven't added any individual buildings. This is optional. You don't have to add individual buildings unless you would like to track performance separately. This will only be possible if you have your buildings metered individually. Also keep in mind that if you enter individual buildings, you will still need to keep use and meter information about the property as a whole up to date in order to receive accurate metrics about your property (and, in some cases, to apply for the ENERGY STAR). [Learn more about tracking multi-building properties.](#)

4. A new page “**Add a Building to *Campus Name***” appears (see below). You have two options:
- If your building is already created in your ESPM account, but is not yet linked to a campus, go to the “**Add Existing Buildings**” section.
  - If your building is not yet created in your ESPM account, use the “**Enter a New Building**” section.

### Add Existing Buildings

If buildings already exist within your Portfolio Manager account that you would like to add, you can associate them with this property.

[Select Buildings](#)
Selected Buildings: 0

[Add Buildings](#)
[Cancel](#)

### Enter a New Building

If you need to add a building to this property that has not been entered yet, you can provide the name and property type to get started. You will have the opportunity to enter specific information about the building as you walk through the addition.

Name: \*

Property Type: \* Select a property type ▼

Construction Status: \* Existing ▼

Gross Floor Area: \*  Sq. Ft. ▼ ☐ Temporary Value

Gross Floor Area (GFA) is the total property floor area, measured from the outside surface of the exterior walls of the building(s). Do not include parking. [Details on what to include.](#)

Irrigated Area:  Sq. Ft. ▼

[+ Add Another Building](#)

[Continue](#)
[Cancel](#)

## Updating properties and correcting data

- In the property's **"Details"** tab, you can:
  - Change the basic information
  - Add and modify unique identifiers
  - Change the property type
  - Update the details of the property uses or correct errors

Summary

Details

Energy

Water

Waste & Materials

Goals

Design

Basic Information

Construction Status:

Existing property that is multiple buildings

Property GFA - Self-Reported:

929 Sq. M.

Occupancy:

60%

Edit

Unique Identifiers (IDs)

Portfolio Manager ID:

20599689

Custom IDs:

None

Standard IDs:

None

You can select from Portfolio Manager's Standard IDs to provide information to others in data requests. Or you can create up to three Custom IDs so that you can cross reference your property in other systems.

Edit

Property Uses and Use Details

View as Diagram

Add Another Type of Use

Add

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Multifamily Housing	929 m <sup>2</sup>	I want to... ▼
Property GFA (Buildings):		929 (used to calculate EUI)	
Property GFA (Parking):		0	

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Property GFA by Use

Multifamily Hous...: 100 %

Property Type

Property Type - Self-Selected:

Multifamily Housing [Edit](#)

Property Type -Portfolio Manager-Calculated:

Multifamily Housing

The Portfolio Manager-Calculated Property Type is used for your metrics (except for Mixed Use properties). [Learn more about property types.](#)

- To update your information, go to the “**Property Uses and Use Details**” section and, in the drop-down Action list, select “**Update with New Information**”.

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Multifamily Housing	929 m <sup>2</sup>	I want to... ▼
Property GFA (Buildings):		929 (used to calculate EUI)	
Property GFA (Parking):		0	

- A new page will appear in which you will have to update the desired value and select the date from which this new value is effective.

Detail	Current Value	Updated Value	Current As Of	Temporary Value
★ Gross Floor Area	10000 Sq. Ft. (as of 01/01/2004)	<input type="text"/> Sq. Ft. ▾	<input type="text"/>	<input type="checkbox"/>
★ Total Number of Residential Living Units	12 (as of 01/01/2004)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Low-rise Building (1-4 stories)	12 (as of 01/01/2004)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Mid-rise Building (5-9 stories)	0 (as of 01/01/2004)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a High-rise Building (10 or more stories)	0 (as of 01/01/2004)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Number of Bedrooms	14 (as of 01/01/2004)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Common Entrance	Yes (as of 01/01/2004)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
Resident Population Type	Not Entered	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Government Subsidized Housing	Not Entered	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Number of Laundry Hookups in All Units	Not Entered	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Number of Laundry Hookups in Common Area(s)	Not Entered	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	All of it - 100% (as of 01/01/2004)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	All of it - 100% (as of 01/01/2004)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>

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

📌 If your property has more than one building, you need to update your Property Use Details (# Workers, Weekly Operating Hours of operation) for both the parent property (campus) and the child properties. It is not done automatically. [Learn more about keeping Use Details up to date](#)

[Cancel](#)

- To correct an error that was made during data entry, from the property's "Details" tab, in the drop-down Action list, select "Correct Mistakes" and the "History Log for (building use)" page opens.

### History Log for Building Use

Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (campus), you need to [update these Property Use Details in BOTH the parent and child properties](#).

★ Gross Floor Area

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/2004  (to present)	10,000 Sq. Ft. ▾	<input type="checkbox"/>	Antoine Gérin-Roze	04/10/2022

✗ Delete Selected Entries



5. Correct the value and be aware that, unlike updating information, the Current As Of date should remain unchanged; the revision date will be updated automatically.

**Caution:** When you correct a value, the new value overwrites the old one and the calculations are automatically redone with the new value.

# Frequently asked questions

## 1. *Why use the ENERGY STAR Portfolio Manager (ESPM) tool?*

ESPM is a free bilingual energy database for buildings. It allows you to compile monthly energy data, which creates an energy consumption history for your building. This history will then follow the building throughout its life cycle and enable you to manage its energy usage.

Among ESPM's advantages, it computes and presents energy performance using many different kinds of indicators. These include annual energy intensity, annual GHG intensity, weather-normalized energy intensity and more. Graphical representations are also available. All data is exportable in Excel format, which allows you to build your own reports.

The tool also allows for several kinds of benchmarking against peers based on the Energy Star rating. It allows energy monitoring against personalized reduction objectives.

ESPM is also used to obtain LEED, BOMA BEST and ENERGY STAR certifications and in the BEC program.

With this tool, any property owner or manager will be able to:

- Benefit from positive showcasing and visibility
- Have a real impact on reducing energy consumption and GHG emissions
- Access unique resources to implement reductions and succeed in challenges
- Reduce their energy costs and operating budgets
- Develop a concrete energy management strategy
- Improve energy performance in a sustainable way.

## 2. *Is it possible to view the energy information of any property in ESPM?*

Yes, administrators can share their property information. ESPM makes it easy to share properties with the “**Sharing**” option explained in this section above: [Sharing a property](#). The Sharing option will allow you to access a property configured in another account. It comes with different levels of restrictions:

- Read only access
- Full access: which allows viewing and modifying
- Customized access: which allows you to define more targeted authorizations

## 3. *Can the conditions defined in the ESPM glossary for the definition of gross floor area (GFA) be recognized as definitions and used as references?*

Yes, the ESPM glossary was used to write the By-Law. The term “gross floor area” was simply replaced with “floor area”.

Only the following sentence was added for clarification: “For the purposes of this definition, in the case of a semi-detached or contiguous building, the property line acts as the exterior wall;”

***4. When creating a property, ESPM requests information on the occupancy rate of the building, will this eventually affect the City's rating calculation?***

The occupancy rate is not part of the information to be reported to the City. However, it is required when creating a property in ESPM, so make sure you enter it. While this is relevant information, it will not be included in the eventual calculation of the GHG emissions score.

***5. How should energy consumption be reported if a billing period straddles two years (e.g., January's electricity or natural gas bill)?***

ESPM normalizes your energy consumption data. So, even if you enter 13 months, ESPM will automatically normalize the data to fit into a 12-month calendar year. Therefore, be sure to enter all billing periods with energy delivered during the required reporting year.

***6. If, in a given year, the building's consumption of an energy source delivered in bulk (e.g., fuel oil) is less than or greater than the amount delivered, how do I report the consumption of that energy source?***

The consumption will be analyzed based on the delivery date, even if the entire quantity delivered has not been consumed. The City of Montréal considers all fuel deliveries in a year as consumed in that year.

***7. In the disclosure, can we exclude insignificant use energy sources in the overall balance? (e.g. generator diesel, cooking gas).***

No, it is important to report all sources of energy consumed by the building during the reporting year including electrical energy sources that are generated on site such as by generators.

***8. What if the owner detects an error after submitting the information to the City?***

Obtaining accurate and true data is an ongoing process. With this in mind, the City of Montréal strongly encourages owners and their managers to conduct an internal or external verification of data prior to submission. However, if an error is detected after the data has been submitted, the owner must notify the City by e-mail, correct any information that was entered in error, and resubmit the data to the City.

Changes to relevant data after submission will require a new report submission.

**9. *If there are buildings that share a meter or common areas, what is the procedure to follow?***

If separate buildings have sub-meters, or if it is possible to make reasonable calculations or assumptions to allocate energy use to each individual building, the buildings should be reported separately.

In other cases, and only these, these buildings should be compared as campuses, following the instructions described in the [Campus mode](#) section of this guide, above.

For more details, see also the ENERGY STAR How to Benchmark a Campus in Portfolio Manager guide:

<https://www.energystar.gov/buildings/tools-and-resources/how-benchmark-campus> .

A French version of this guide will soon be available on the Natural Resources Canada website.

**10. *During a real estate transaction, will the new owner have access to the data disclosed by the previous owner? And how will the data be transferred?***

Any owner who has registered a building on ESPM can transfer the entire building record to the new owner. This is the simplest transfer procedure. Refer to the [Transferring a property](#) section, above.

The responsibility for reporting rests with the new owner as of the June 30 deadline. When selling a building, it is advisable to plan for the transfer of past energy data and compliance with the declarations required by the By-Law.

**11. *How will the data be inspected for validity?***

Obtaining accurate and true data is an ongoing process. With this in mind, the City of Montréal strongly encourages owners and their managers to conduct an internal or external verification of data prior to submission.

Portfolio Manager has a built-in Data Quality Checker to verify your information and detect possible errors. Refer to the section [Error-checking your data](#), above.

The City of Montréal will conduct sporadic audits of subject buildings as well as in-depth audits in cases where the data does not match the selected building use type.

***12.Does the City of Montréal use the ENERGY STAR rating available in ESPM for performance evaluation?***

No, under the GHG Disclosure and Rating of Large Buildings By-Laws, the ENERGY STAR energy performance rating is not used or even considered. Only GHG emissions and intensity calculated by the City are considered.

***13.How should a building owner with multiple meters that do not belong to him proceed to enter energy data?***

There are indeed cases of buildings where each tenant or co-owner is connected to his own meter. Landlord-tenant or condominium agreements can be structured so that aggregate building consumption is reported directly to the landlord (or condominium corporation) by the energy provider and easily reported to the City. The owner will need to contact his or her energy suppliers to determine what options are available and obtain an official form for this type of request.

A landlord could also ask his tenants to “share” their energy consumption for their section of the building. In fact, the ESPM “Share a Property” option can also be used for this purpose:

If you are a tenant and have a separate meter from the rest of the building, you can register your space individually and then share your space with your building owner as long as they also have an ESPM account.

This method also works for condominiums. At this time, it is necessary to ensure that the meters connected to the common areas are also registered in the designated owner's master account.

***14.If I produce thermal energy and sell my excess energy, how should I treat it?***

In ESPM, it is possible to enter negative values in the declaration of your energy data, so ESPM will subtract these energy data from your consumption.

See the answer to the question on the Natural Resources Canada website:

[Can I enter a negative metric for energy I produce on site and distribute to other buildings?](#)

***15.If I buy “green” energy, how do I handle it?***

Follow the same steps outlined in the section: [Entering energy consumption data](#), and select "Electricity - Purchased from the Grid" in Step 3. When entering the meter billing data, check the "Green Power" box.

1 Energy Meter(s) for Example

▼ Electric Grid Meter

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
<input type="checkbox"/>					<input type="checkbox"/>	<input checked="" type="checkbox"/> <a href="#">Edit</a>		

A new "About the Green Power" box will appear, and you will be able to fill in the information detailing your situation.

About the Green Power for this Entry

Quantity: \*  kWh (thousand Watt-hours) The quantity of green power must be entered in the same units as your energy usage for this time period.

Generation Location: \*

- ☐ I know the specific plant where the energy was generated.
- ☐ I don't know the specific plant, but I know the [eGRID Subregion](#) (US) or Province (Canada) where the energy was generated.
- ☒ I don't know anything about where the energy was generated.

Fuel Source(s) - Optional:

- ☐ Biogas
- ☐ Biomass
- ☐ Geothermal
- ☐ Small Hydropower
- ☐ Solar
- ☐ Wind
- ☐ Unknown

Save

## **Additional sources of information**

Natural Resources Canada offers several kinds of support for owners who want to better understand how to benchmark their building or use the ENERGY STAR Portfolio Manager tool. We suggest the following pages:

The NRCan “Benchmarking - Frequently Asked Questions” page for answers on:

1. Energy Benchmarking
2. ENERGY STAR Portfolio Manager - General
3. ENERGY STAR Portfolio Manager - Troubleshooting
4. ENERGY STAR Certification (for information purposes only, not relevant to By-Law 21-042)
5. Web Services

# Appendix I

Table 1: List of Building Use Types

## Types of property use

<i>Other</i>	<i>Accommodation / Residence</i>	<i>Services to the public</i>
Non-refrigerated warehouse	Hotel	Food trade
Refrigerated warehouse	Multiple-dwelling building	Retail trade
Self-storage rooms	Prison / Detention centre	Automobile dealer
Transportation terminal / station	Residence / Dormitory	Convenience store with gas station
Other	Other - Accommodation / Residence	Convenience store without gas station
<i>Shopping centre</i>	<i>Specialized hospital</i>	Repair services (vehicles, shoes, locksmith, etc.)
Indoor shopping centre	Ambulatory surgery centre	Personal Services (health, beauty, dry cleaning, etc.)
Strip mall shopping centre	Medical clinic	Food services
Distribution centre	Veterinary clinic	Bank branch
Wholesaler / superstore	Hospital (medical and surgical care)	Supermarket / grocery store
Other - Shopping centre	Outpatient rehabilitation centre / Physiotherapy centre	Other - Services to the public
<i>Entertainment / Public gathering places</i>	Emergency / clinic / outpatient clinic	<i>Public utilities</i>
Aquarium	Other - Specialty hospital	Library
Casino	<i>Recreational</i>	Postal centre / post office
Convention centre	Training centre / health club / gym	Barracks/armoury
Performing arts centre	Roller skating centre	Fire station
Personal development centre	Skating rink / curling rink	Electric power plant / substation
Seniors' community centre	Swimming pool	Police station
Cinema	Race track	Courthouse
Place of worship	Indoor arena	Other - Public services
Museum	Bowling alley	<i>Stadium</i>



Social gathering room / meeting room
Zoo
Other - Entertainment / Public gathering places
<b><i>Education</i></b>
College/University
Vocational school
School from preschool to high school
Adult education
College/University
Vocational school

Other - Recreational
<b><i>Restaurant / Bar</i></b>
Bar / Nightclub
Restaurant
Fast food
Other - Restaurant / Bar
<b><i>Departments</i></b>
Office
Financial centre
Other - Services

Stadium (closed)
Stadium (open)
Other - Stadium
<b><i>Science / Technology</i></b>
Laboratory
Data processing centre
Other - Technology / Science
Laboratory
Data processing centre
Other - Technology / Science