

# ENERGY STAR Data Submission Guide

## Quick Start Guide — Submitting Energy Data to Ontoly

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This guide covers only what's specific to submitting your building's utility data for the Ontoly BERS Program. Energy Star Portfolio Manager's built-in prompts will guide you through the general setup steps. For full Energy Star help documentation visit: [portfoliomanager.energystar.gov](https://portfoliomanager.energystar.gov)

### BERS Program Data Requirements — Read Before You Start

- ✓ Upload actuals only — no estimates or projected values are accepted
- ✓ Minimum 12 months, up to 36 months of pre-retrofit baseline data required
- ✓ Ongoing annual data required for each monitoring year of your crediting period
- ✓ Ontoly only requires three columns: Start Date, End Date, and Usage
- ✓ Dates must be entered in YYYY-MM-DD format for bulk uploads
- ✓ Annual Monitoring Report deadline: March 31 of the following year

## SECTION 1 — Set Up Your Account and Property

Create a free account at [portfoliomanager.energystar.gov](https://portfoliomanager.energystar.gov), verify your email, and sign in. Then add your building as an Existing Property — Ontoly does not accept new construction (Design Projects).

Select the building type that best matches your property (e.g., 'Multi-Family Housing' for a MURB). Complete the property profile following Energy Star's built-in prompts.

## SECTION 2 — Add Utility Meter Data

From your property page, go to the 'Energy' tab. Add a separate meter for each utility type (electricity, natural gas, and any other fuels used by your building).

**1**

### Check if your utility offers web services

If your utility supports Energy Star web services it can connect directly and import data automatically. Check Canadian utilities at [natural-resources.canada.ca](https://natural-resources.canada.ca) or U.S. utilities via the Portfolio Manager Help Centre. If not available, enter data manually or via spreadsheet upload (Step 3).

**2**

### Create your meters

Click 'Add a Meter,' enter the meter name, and select units matching your utility bill (e.g., kWh for electricity, m<sup>3</sup> or GJ for natural gas). Click 'Create Meters.'

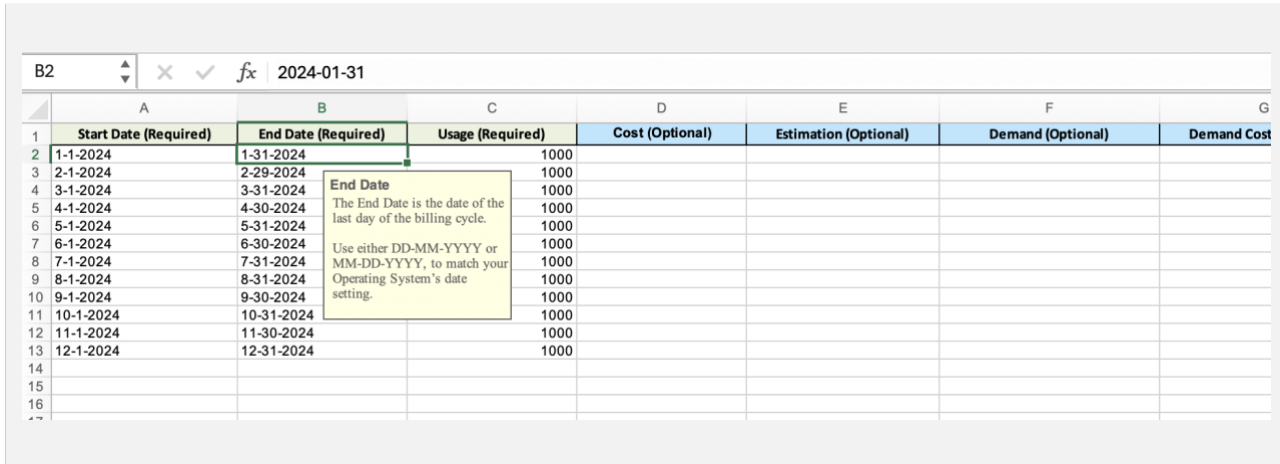
**3**

### Enter monthly utility data

Click 'Click to add an entry' in the meter table. Enter actual monthly usage for each month. Ontoly only requires Start Date, End Date, and Usage — leave all other columns blank.

**Bulk upload tip**

Use the 'single-meter spreadsheet' template to upload multiple months at once. Dates must be in YYYY-MM-DD format and all columns must match the template exactly.



|    | A                     | B                   | C                | D               | E                     | F                 | G           |
|----|-----------------------|---------------------|------------------|-----------------|-----------------------|-------------------|-------------|
|    | Start Date (Required) | End Date (Required) | Usage (Required) | Cost (Optional) | Estimation (Optional) | Demand (Optional) | Demand Cost |
| 1  |                       |                     |                  |                 |                       |                   |             |
| 2  | 1-1-2024              | 1-31-2024           | 1000             |                 |                       |                   |             |
| 3  | 2-1-2024              | 2-29-2024           | 1000             |                 |                       |                   |             |
| 4  | 3-1-2024              | 3-31-2024           | 1000             |                 |                       |                   |             |
| 5  | 4-1-2024              | 4-30-2024           | 1000             |                 |                       |                   |             |
| 6  | 5-1-2024              | 5-31-2024           | 1000             |                 |                       |                   |             |
| 7  | 6-1-2024              | 6-30-2024           | 1000             |                 |                       |                   |             |
| 8  | 7-1-2024              | 7-31-2024           | 1000             |                 |                       |                   |             |
| 9  | 8-1-2024              | 8-31-2024           | 1000             |                 |                       |                   |             |
| 10 | 9-1-2024              | 9-30-2024           | 1000             |                 |                       |                   |             |
| 11 | 10-1-2024             | 10-31-2024          | 1000             |                 |                       |                   |             |
| 12 | 11-1-2024             | 11-30-2024          | 1000             |                 |                       |                   |             |
| 13 | 12-1-2024             | 12-31-2024          | 1000             |                 |                       |                   |             |
| 14 |                       |                     |                  |                 |                       |                   |             |
| 15 |                       |                     |                  |                 |                       |                   |             |
| 16 |                       |                     |                  |                 |                       |                   |             |
| 17 |                       |                     |                  |                 |                       |                   |             |

Energy Star requires 12 full calendar months of data. If you have less than 12 months, Energy Star will flag an error and Ontoly will not be able to establish your baseline.

**4**
**Save your data**

Once all monthly entries are entered, click 'Save Bills.' Return to 'My Portfolio' and confirm your meters appear under the 'Energy' tab as 'Meters — Used to Compute Metrics.'

## SECTION 3 — Share Your Data with Ontoly

Once your data is entered, share your Energy Star account with Ontoly using the steps below. Ontoly will use this access to retrieve your utility data for baseline calculation, monitoring, and verification.

**5**
**Add Ontoly as a contact**




Go to the 'Sharing' tab and click 'your contacts.' Click 'Add New Contact/Connection' and search for the Ontoly organizational account using the credentials provided to you during your project onboarding.

**6**
**Connect with Ontoly**

Click 'Connect.' Once Ontoly accepts your request, a green checkmark will appear and the status will show 'Connected.'

## Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

|   |   |  |  |                   |  |            |  |
|---|---|--|--|-------------------|--|------------|--|
| <p><b>Your Search Criteria</b></p> <p>Name: <input type="text"/></p> <p>Organization: <input type="text" value="Ontoly"/></p> <p>Username: <input type="text" value="OntolyProjects"/></p> <p>Email Address: <input type="text" value="info@ontoly.org"/></p> <p style="text-align: right;"><b>Search</b></p> | <table border="1" style="width: 100%;"> <tr> <td style="width: 70%;">  Ashley Sarauer (OntolyProjects)<br/>CEO with Ontoly                 </td> <td style="width: 30%; text-align: right;"> <span style="color: green;">✔</span> Connected                 </td> </tr> <tr> <td colspan="2" style="text-align: center;">                     Page 1 of 1    50                 </td> </tr> <tr> <td colspan="2" style="text-align: right;">                     1 - 1 of 1                 </td> </tr> </table> |  Ashley Sarauer (OntolyProjects)<br>CEO with Ontoly | <span style="color: green;">✔</span> Connected | Page 1 of 1    50 |  | 1 - 1 of 1 |  |
|  Ashley Sarauer (OntolyProjects)<br>CEO with Ontoly  | <span style="color: green;">✔</span> Connected  |  |  |                   |  |            |  |
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| 1 - 1 of 1  |   |  |  |                   |  |            |  |



Can't find what you are looking for? Try adjusting your search criteria.

**7**

## Share your property

From the 'Sharing' tab, click 'Share (or Edit Access to) a Property.' Select your property and the Ontoly account. Under Permissions, select 'Bulk Sharing' then 'Custom Access' and apply the settings shown below.



### Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions, select the 2nd option.

- \*  **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).

### Select Custom Access Permissions for Properties and Contacts Selected

Please select the permissions level you would like to grant for each item. If "None" is selected for all items, no share will occur.

| Item                              | None                  | Read Only Access                 | Full Access           |
|-----------------------------------|-----------------------|----------------------------------|-----------------------|
| Property Information              | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| ▼ All Meter Information           | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Goals, Improvements, & Checklists | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Recognition                       | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/> |

Additional Options:

| Item   | Yes                              | No                    |
|--|----------------------------------|-----------------------|
| <b>*Share Forward</b><br>Allow the person (or people) selected to share the selected properties with others and give them any permissions that they have, including the right to share with more people. | <input checked="" type="radio"/> | <input type="radio"/> |

**About Permissions**  
 Select permissions for each category. You must provide Read Only or Full Access to the Property Information to share a property.

**Property Information**  
 Includes access to everything on Summary, Details, and Design tabs and all metrics for this property through the Reporting tab, even if you choose None for some of the other options.

- If you want someone to add & delete meters, you need to choose "Full Access" for Property Information

**All Meter Information**  
 Includes access to the Meters tab.

- None** – suppresses access to the Meters tab, so the person can't see your individual meters & bill entries. But annual metrics (based on the sum of these bills) are still accessible via Reporting.
- Read Only** – provides access to view meter entries, but not make any edits.
- Full Access** - provides the ability to add, delete, and edit meter bill

Apply Selection
Cancel

- 8
- Confirm sharing**  
 Click Continue. You should receive a confirmation notification that the property has been shared successfully.

## SECTION 4 — After You Share

After sharing your Energy Star data, complete all remaining project intake forms through the Ontoly Portal. Ontoly will review your data and initiate your Preliminary Ex-Ante BERU Assessment.

**Annual submission reminder**  
 Each year of your crediting period, you must submit updated utility data by March 31.



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You will receive a Verification Cohort Assignment Statement from Ontoly with the name and contact of your assigned verification provider.

**IMPORTANT:** Do not share data with any verification professional other than the key contact listed on your Verification Cohort Assignment Statement.

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Questions? Contact Ontoly at [info@ontoly.org](mailto:info@ontoly.org) or visit [www.ontoly.org](http://www.ontoly.org)

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