

# **Guide to Submitting Data through Portfolio Manager for Ontario's Broader Public Sector**

**Ministry of Energy**  
**Version 2.0 (February 2024)**

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## About Ontario's Broader Public Sector Energy Reporting Initiative

Energy usage can represent one of the largest operating costs for public agencies. Energy reporting and conservation planning helps public agencies:

- better manage their energy use and costs
- identify best practices and energy-saving opportunities
- find ways to reduce greenhouse gas emissions
- evaluate results by comparing similar facilities across the province
- provide a benchmark to set goals
- measure improvement over time

Under the [energy reporting regulation for broader public sector \(BPS\) organizations](#), Ontario public agencies must report their annual energy use each year to the Ministry of Energy by July 1.

More than 700 agencies are required to submit a report, including:

- municipalities and municipal service boards
- universities and colleges
- school boards
- hospitals

## The Portfolio Manager Guide and Other Resources

This document will guide you through the process of entering your energy consumption data into Portfolio Manager specifically for BPS organizations.

**Here are some other resources that may help you with future questions about reporting:**

- [Energy conservation for the broader public sector](#) provides an overview of the initiative, reporting requirements and benefits of reporting.
- The [Guide to energy reporting for the broader public sector](#) provides detail on the reporting steps and requirements, including property types and collecting usage data.
- The [Portfolio Manager training website](#) provides training content, demonstration videos and how-to FAQs on a wide variety of Portfolio Manager features.

### Stay informed

The best way to stay informed is to update your organization's reporting lead contact information. The reporting lead is the person who will receive energy reporting related emails for your organization. You can update the information any time.

To update your reporting lead contact information, please contact

[bpssupport@ontario.ca](mailto:bpssupport@ontario.ca).

# 1. Accessing Your Portfolio Manager Account

**The Ministry of Energy has created corporate user accounts in Portfolio Manager for all BPS organizations.**

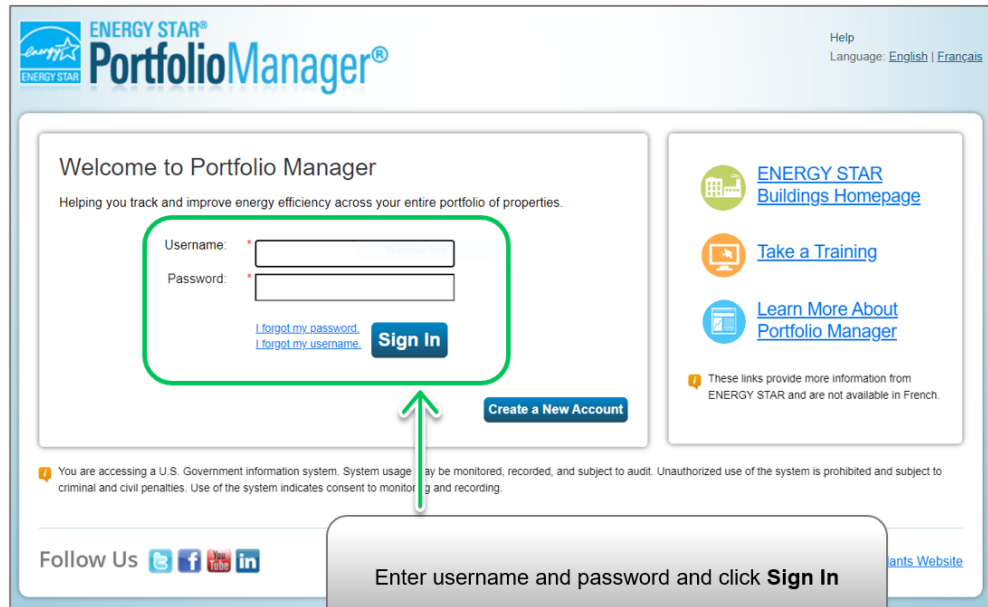
To ease the transition to using a new reporting software, we created corporate user accounts for all BPS organizations in Portfolio Manager. We also added historical energy consumption data from 2016 to 2020 to these accounts.

Login credentials were shared with all BPS contacts via email. If your organization has not received your login credentials, please contact [bpssupport@ontario.ca](mailto:bpssupport@ontario.ca).

We recommend using these accounts, as they have been set up with certain information we are requesting for reporting. However, it is not required. If your organization has a pre-existing account, you can choose to continue to use it.

**Follow these steps to log in to your Portfolio Manager account.**

1. Open your web browser and go to the [ENERGY STAR Portfolio Manager login page..](#)
2. Enter the username and password provided by the Ministry of Energy to log in to your organization's corporate Portfolio Manager account.



We recommend that instead of changing this password, organizations leave the corporate account as is, and create individual accounts for staff that work in energy reporting. This will prevent the issue of staffing changes leading to locked out accounts.

## 1.1 Updating Your Contact Information

When we created corporate accounts in Portfolio Manager for all BPS organizations, each was set up using the Ministry of Energy's email account as the default.

**IMPORTANT:** When you log in to your corporate account for the first time, click on Account Settings at the top of the screen, and change the email address to one that is regularly monitored. For example, the address of the reporting lead at your organization. This will ensure that any contact or notifications from Portfolio Manager make their way to your email account. This includes the confirmation email that is sent by Portfolio Manager after a successful report submission to the Ministry of Energy.

You can also include your organization's phone number.

The screenshot displays the 'Edit Account' interface in Portfolio Manager. At the top, the Energy Star logo and 'Portfolio Manager' branding are visible. A navigation bar includes 'Welcome OntENERGY-BPS', 'Account Settings' (highlighted with a red box), 'Notifications', 'ENERGY STAR Notifications', 'Contacts', 'Help', and 'Sign Out'. The main content area is titled 'Edit Account' and features four tabs: 'About Yourself' (selected), 'Password', 'Your Preferences', and 'Software Development'. The 'About Yourself' section contains the following fields:

- Portfolio Manager Account ID: 303031 (Username: OntENERGY-BPS)
- First Name: Ontario Ministry of Energy
- Last Name: Ontario Public Service
- Organization: Ontario Ministry of Energy (with an 'Add Organization' link)
- Job Title: Corporate Account
- Email: bpssupport@ontario.ca
- Confirm Email: bpssupport@ontario.ca (with a green checkmark and 'Emails Match' text)
- Phone: 1-844.274.0689
- Country: Canada

On the right side, there are two informational sections:

- Your Contact Information:** A message explaining that if connection requests are accepted, contact information will be visible to 'connected' contacts and can be disconnected.
- Your Organization Information:** A message stating that the organization was automatically added to the user's contacts and organizations list, with links to 'edit this organization'.



## 2. Entering Data

Once you have created an account and are logged in, you can start adding your data. There are three different methods to add your data, listed below. This guide shows you how to enter data using the web form. You can refer to the Portfolio Manager website for additional instructions on entering data using Microsoft Excel and via Web Services.

1. **Web Form** - This method allows you to enter your data manually — one building at a time — both for initial data entry and data updates.
2. **Microsoft Excel** - If you're already using Excel to track data or you have several buildings, you may want to import your data straight from Excel. This method is faster for large numbers of buildings.
3. **Web Services** - Many leading energy services companies exchange data directly with Portfolio Manager. These companies can upload your energy and water data for you. If you decide to use web services provided by a third party, you are responsible for ensuring the quality and accuracy of the data submitted.

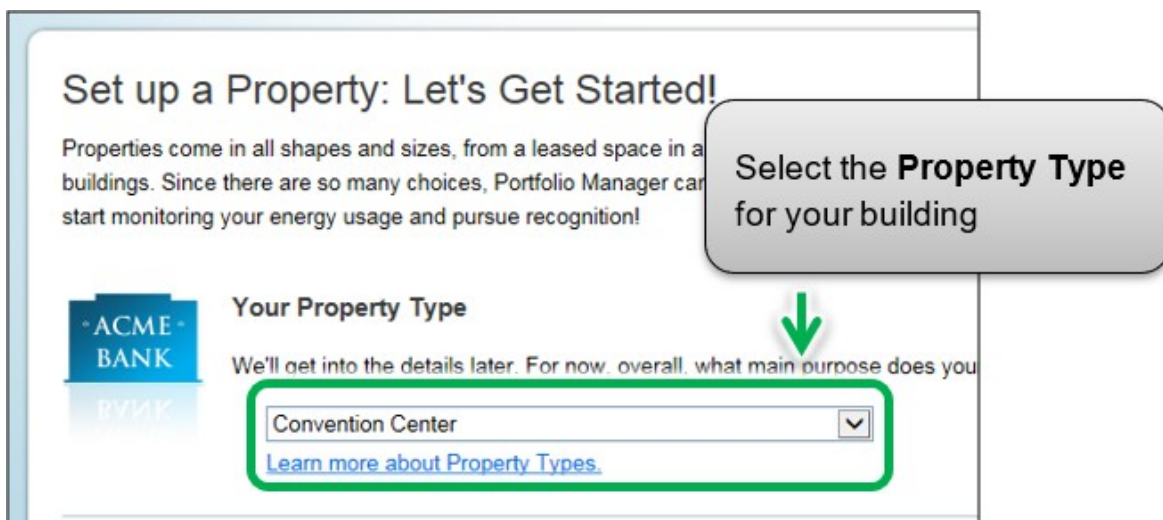
## 2.1 Adding and Setting Up a Property

The following are the steps to add and set up a property.

1. Click on the **Add a Property** button under the **MyPortfolio** tab.

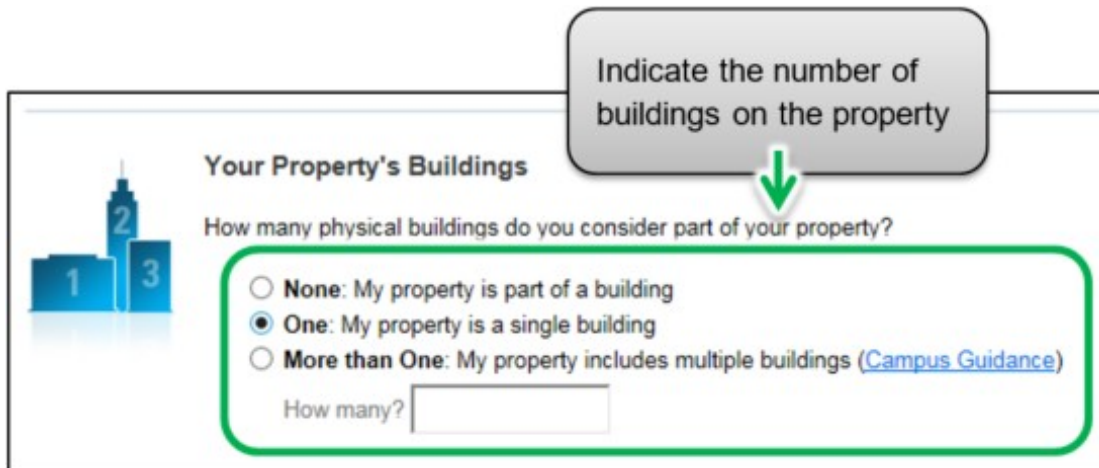


2. The screen will reload to show the **Set up a Property** page. Select the property's primary function from the **Your Property Type** drop-down list.



3. In the **Your Property's Buildings** section, indicate the number of buildings included on the property.

Indicate the number of buildings on the property



**Your Property's Buildings**

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

**None:** My property is part of a building

**One:** My property is a single building

**More than One:** My property includes multiple buildings ([Campus Guidance](#))

How many?

4. In the **Your Property's Construction Status** section, select **Existing**.

**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.

**Test Property:** I am entering this property to evaluate the energy efficiency of the design project using Portfolio Manager to evaluate the energy efficiency of the design project.

**Test Property:** I am entering it to test features, or for other purposes such as training.

Select **Existing** for your property's construction status

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

5. Click on the **Get Started!** button to confirm your choices.

**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

Click on the **Get Started!** button

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

6. The screen will reload to show the **Basic Property Information** page. Enter the required information. Fields marked with a red asterisk are mandatory. Use numeric values only with no commas when entering Gross Floor Area data.

**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.

Fields marked with a red asterisk are mandatory

**About Your Property**

Name:

Country:

Street Address:

City/Municipality:

County:

State/Province:

Postal Code:

Year Built:

Gross Floor Area:    Temporary Value

Irrigated Area:

Occupancy:  %

Property Photo (optional):  No file chosen

Select an image file on your computer with the format type of .jpg, .jpeg, .png or .gif; photos will be resized to fit a space of 2.78 inches wide x 2 inches tall.

**Note:** Occupancy is the percentage of your property's Gross Floor Area that is occupied and operational. See more on calculating Occupancy on [Energy Star's Website](#). Although this field is mandatory for Energy Star, it is not one required by the ministry and is not utilized in the calculation of GHG emissions.

7. Once you have entered all the necessary information, click on the Continue button to proceed to the next page.
8. The screen will reload to show the **How is it used?** page. If your property has multiple building uses, select the desired type of use option from the **Add Another Type of Use** drop-down list and click on the **Add** button. For example, a property may have an “office” and a “restaurant/bar” on the same property.

Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

**Basic Information**

Name:	Brambleberry Towers	Country:	CA
Property Type:	Office	Address:	55 Elm Street Sudbury, ON P3C 1S2 <a href="#">Map It</a>
Year Built:	1992		
Property consists of:	1 building		

[Edit](#)

If applicable, select the additional **Type of Use** from the drop-down list and then click on the **Add** button

Restaurant/Bar [Add](#)

More Specifically? Restaurant

business activities. This includes administrative and professional offices.

9. Scroll to the next section of the page and enter all of the Property Use Details for each type of use:

**Gross Floor Area** – If you specified multiple building uses for your property, the combined **Gross Floor Area** for each type of use must be equal to the total **Gross Floor Area** that you specified for the overall property in step 6.

**Office Use** / [Edit Name](#) Delete

Office refers to buildings used for the conduct of commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area (GFA) should include all space within the building(s) including offices, conference rooms and auditoriums, break rooms, kitchens, lobbies, fitness areas, basements, storage areas, stairways, and elevator shafts.

If you have restaurants, retail, or services (dry cleaners) within the Office, you should most likely include this square footage and energy in the Office Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

- If it is a [Property Use Type that can get an ENERGY STAR Score](#) (note: Retail can only get a score if it is greater than 5,000 square feet)
- If it accounts for more than 25% of the property's GFA
- If it is a vacant/unoccupied Office
- If the Hours of Operation differ by more than 10 hours from the main Property Use

[More on this rule.](#)

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	59,340 Sq. Ft.	1/1/1992	<input type="checkbox"/>
★ Weekly Operating Hours	112 Use a default	1/1/2017	<input type="checkbox"/>
★ Number of Workers on Main Shift	50 Use a default	1/1/2017	<input type="checkbox"/>
★ Number of Computers	50 Use a default	1/1/2017	<input type="checkbox"/>
★ Percent That Can Be Heated	50 % or more		
★ Percent That Can Be Cooled	50 % or more		

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

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**Restaurant Use** / [Edit Name](#)

Restaurant refers to buildings used for preparation and sale of ready-to-eat food and beverages, but which do not fit in the fast food property type. Examples include fast casual, casual, and fine dining restaurants.

Gross Floor Area should include all space within the building(s), including kitchens, sales areas, dining areas, offices, staff break rooms, and storage areas. Gross Floor Area should not include any outdoor/interior seating areas, but the energy use of those indoor areas should be reported on your energy meters.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	5,000 Sq. Ft.	01/01/1992	<input type="checkbox"/>
Weekly Operating Hours	98	01/01/2017	<input type="checkbox"/>

Total combined **Gross Floor Area** must equal total **Gross Floor Area** specified for the overall property

- a. A building may include more than one property use type (e.g., classroom / laboratory) and if so you will need to indicate the various use types in your building and provide the gross floor area for each use type in your building.
  
- b. **Number of Workers on Main Shift, Number of Computers, Percent That Can Be Heated, and Percent That Can Be Cooled** are not required under the BPS initiative. If you choose not to enter these, Portfolio Manager will automatically assign default values for the building.

10. Scroll to the **Parking Use** section and, if applicable, enter the Parking Use **Property Use Details**. Portfolio Manager tracks area entered in the **Parking Use** section separately from property **Gross Floor Area**, so you should **NOT** include parking area in the total Gross Floor Area for the overall property.

Property Use Detail	Value	Current As Of	Temporary Value
Open Parking Lot Size	<input type="text"/> Sq. Ft. ▾	01/01/2016	
Partially Enclosed Parking Garage Size	<input type="text"/> Sq. Ft. ▾	01/01/2016	
Completely Enclosed Parking Garage Size	<input type="text"/> Sq. Ft. ▾	01/01/2016	
Supplemental Heating	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2016	

If applicable, enter property use details in the **Parking Use** section

11. Click on the **Add Property** button at the bottom of the page to confirm your changes. The screen will reload to show the **Summary** tab on the property's profile page.

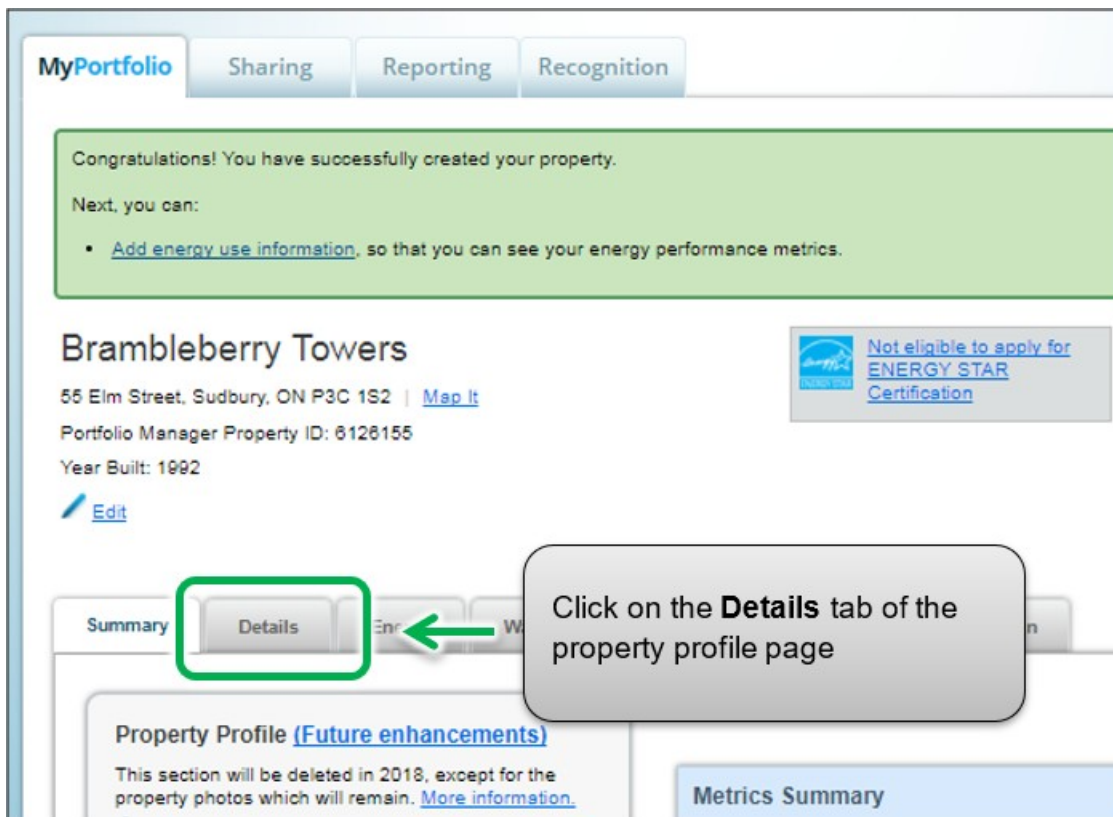
## 2.2 Adding Your Building's Custom IDs

Once you have completed adding and setting up a property in Portfolio Manager, you will be presented with the property's profile page. From this page you can view summary information, enter the property's details, energy usage, and more.

To successfully submit your report, it is essential that you enter your building's custom ID information in the Details tab of the property's profile page.

The following are the steps to add your building's custom IDs to the property profile.

1. Continuing from where we left off in the previous section, click on the **Details** tab of the property profile page.





2. The page will refresh to show the **Details** section. Scroll down the page to view the **Unique Identifiers (IDs)** section and click on the **Edit** button found in the section.

The screenshot displays a software interface with a top navigation bar containing tabs for Summary, Details, Energy, Water, Waste & Materials, Goals, and Design. The 'Details' tab is active. On the left, there are two main sections: 'Basic Information' and 'Unique Identifiers (IDs)'. The 'Basic Information' section includes 'Construction Status' (Test property that is one single building), 'Property GFA - Self-Reported' (64,340 Sq. Ft.), and 'Occupancy' (80%). The 'Unique Identifiers (IDs)' section includes 'Portfolio Manager ID' (6023547), 'Custom IDs' (None), and 'Standard IDs' (None). A callout box with a green border highlights the 'Unique Identifiers (IDs)' section, and a smaller callout box with a grey background and white text points to the 'Edit' button in this section, stating 'Click on the **Edit** button'. To the right, the 'Property Uses and Use Details' section features a 'View as Diagram' link and an 'Add Another Type of Use' button. Below this is a table with columns for 'Name', 'Property Use Type', and 'GFA'. The table lists 'Convention Center Use' and 'Restaurant Use'. Below the table, there are summary statistics for 'Property GFA (Buildings): 64,340 Sq. Ft.' and 'Property GFA (Parking): 0 Sq. Ft.'. A pie chart titled 'Property GFA by Use' shows 'Restaurant' at 7.77%. A note at the bottom of the table area says 'To add multiple uses and buildings to this project, you need to upload your information.'

Name	Property Use Type	GFA
▶ Convention Center Use	Convention Center	5,000
▶ Restaurant Use	Restaurant	5,000

Property GFA (Buildings): 64,340 Sq. Ft.  
Property GFA (Parking): 0 Sq. Ft.

Restaurant: 7.77 %

3. The screen will reload to show the **Edit Property Identifiers (IDs)** page. Scroll to the **Custom IDs** box. Enter Custom ID names and ID values based on the sector your organization belongs to from the information in below.
- a. Custom ID 1 Name – Enter the term “Organization Name” in the space for this field
  - b. Custom ID 1 Value – Enter the name of the BPS organization for which you are entering data (Example, City of Toronto, Algonquin College etc.)
  - c. Custom ID 2 Name –
    - Enter the term “Sub-sector” in the space for this field if you are reporting on behalf of municipalities, municipal service boards, post-secondary institutions or hospitals.
    - Enter the term “Weekly Average Hours” in the space for this field if you are reporting on behalf of school boards.
  - d. Custom ID 2 Value –
    - For municipalities, enter the sub-sector value as “Municipality”
    - For municipal service boards, enter the sub-sector value as “Municipal Service Board”
    - For post-secondary institutions, enter the sub-sector value as “College” or “University”
    - For public hospitals, enter the sub-sector value as “Acute/Chronic Hospital”, “Acute Hospital”, or “Chronic Hospital”
    - For school boards, enter the number of average hours per week that the property is operating for

e. Custom ID 3 Name –

- Enter the term “Number of Portables” in the space for this field if you are reporting on behalf of school boards.
- Enter the term “Weekly Average Hours” in the space for this field if you are reporting on behalf of municipalities, municipal service boards, post-secondary institutions or hospitals

f. Custom ID 3 Value –

- For municipalities, municipal service boards, post-secondary institutions or hospitals, enter the number of average hours per week that the property is operating for
- For school boards, enter the number of portables that the school has



**Important: The ministry will not be able to report data correctly if you do not enter the correct custom ID information for your property.**

Custom IDs

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.

Custom ID 1:

Name:  ID:

Custom ID 2:

Name:  ID:

Custom ID 3:

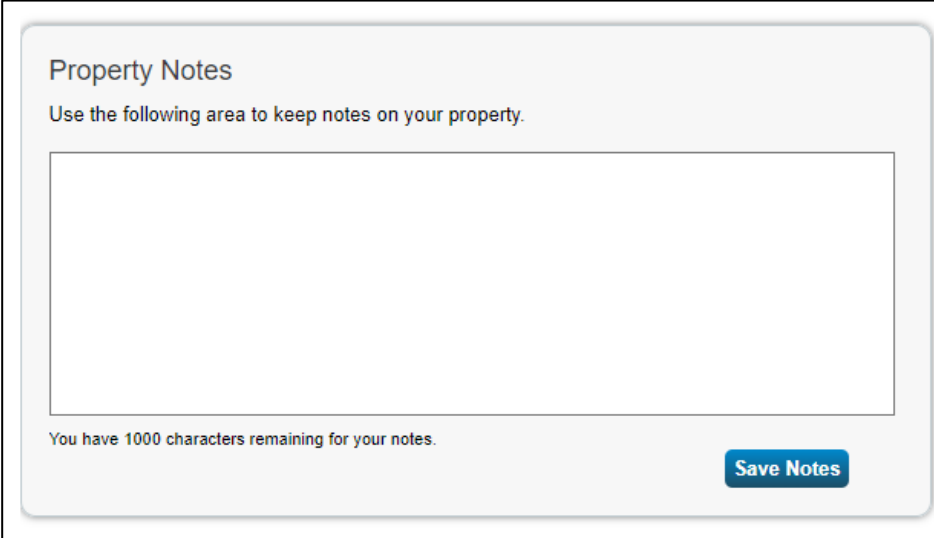
Name:  ID:

4. Click on the **Save** button to confirm your changes and proceed to the next step.

## 2.3 Adding Property Notes

The following are the steps to add property notes to the property profile. **This section is optional.**

1. Once you have entered your Custom IDs and saved your changes, you will be returned to the **Details** tab page. Scroll to the lower part of the page and locate the **Property Notes** section. Click in the **Property Notes** field and enter the any additional information you would like to for this property. Then click on the **Save Notes** button just below the field to save your changes.



The screenshot shows a light gray rounded rectangular box. At the top left, the text "Property Notes" is displayed in a dark gray font. Below it, a smaller line of text reads "Use the following area to keep notes on your property." In the center of the box is a large, empty white rectangular text input field. At the bottom left of the box, the text "You have 1000 characters remaining for your notes." is shown. At the bottom right, there is a blue button with the white text "Save Notes".

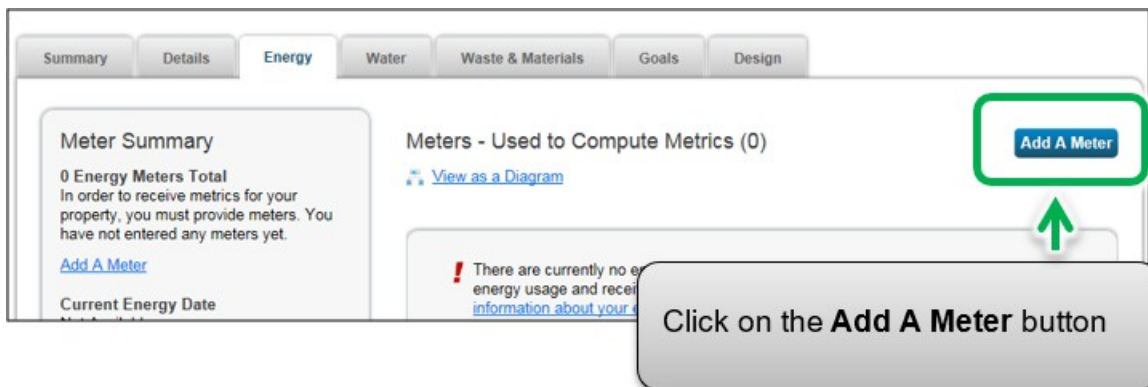
## 2.3 Adding Energy Meters and Energy Consumption Data

The following are the steps to add an energy meter to the property profile.

1. Continuing from the previous section, scroll to the top of the property profile page and click on the **Energy** tab.



2. The page will reload to show the **Energy** tab page. In the top right corner of the tab page, click on the **Add A Meter** button.



3. The screen will reload to show the **Sources of Your Property's Energy** page. You will be presented with a list of energy source types – some are normally metered (e.g., electricity and natural gas) while others are often measured another way (e.g., propane and wood). Select all of the types that apply to your property. Depending on the type of meter selected, you will be prompted to select additional related options.

The screenshot shows a web form titled "Sources of Your Property's Energy" with a lightning bolt icon. The instruction reads: "What kind of energy do you want to track? Please select all that apply." The form contains a list of energy sources with checkboxes and input fields. A green rounded rectangle highlights the "Electric" and "Natural Gas" sections. A grey callout box with a green arrow points to this highlighted area, containing the text: "Select all of the energy source types that apply to your property". Another grey callout box with a green arrow points to the "Get Started!" button at the bottom right, containing the text: "Click on the **Get Started!** Button to save your changes". The "Get Started!" button is also highlighted with a green rounded rectangle. A "Help" button is visible in the bottom left corner.

**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
  - How Many Meters?
  - generated onsite with my own solar panels
  - generated onsite with my own wind turbines
- Natural Gas
  - How Many Meters?
- 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:

[Help](#)  [Cancel](#)

4. Click on the **Get Started!** button and proceed to the next step.

- The page will reload to show the **About Your Meters** page with a table listing the meter types you selected in the previous step. Under the **Meter Name** column, click on the name for the first meter type listed and enter the desired label for the meter.

About Your Meters for Brambleberry Towers

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

2 Energy Meters for Brambleberry Towers (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	En De
<input type="checkbox"/>	Natural Gas	Natural Gas				<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		

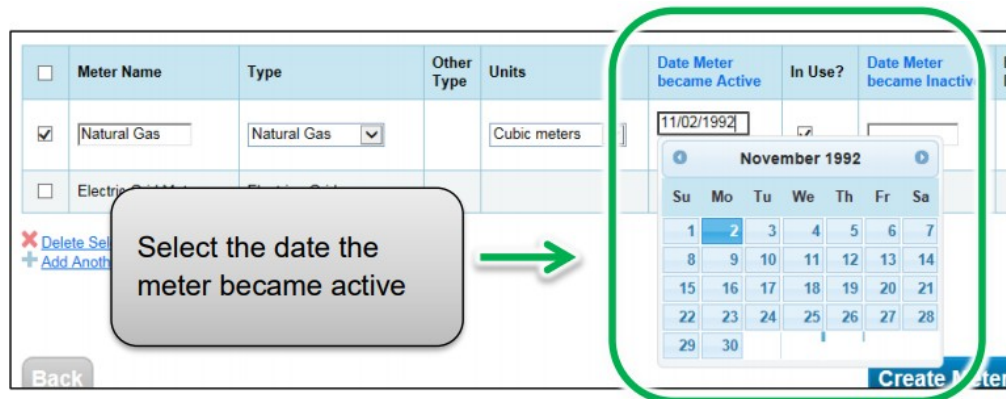
Click on the name for the **Meter Name** field and enter the desired label for the meter

- Click the cell in the **Units** column. The fields for the meter will become active and you can select the same unit of measure for the meter as you have for your usage data. For example, for electricity, the most common unit of measure is kWh (kilowatt hours) and for natural gas, the most common unit of measure is m<sup>3</sup> (cubic meters).

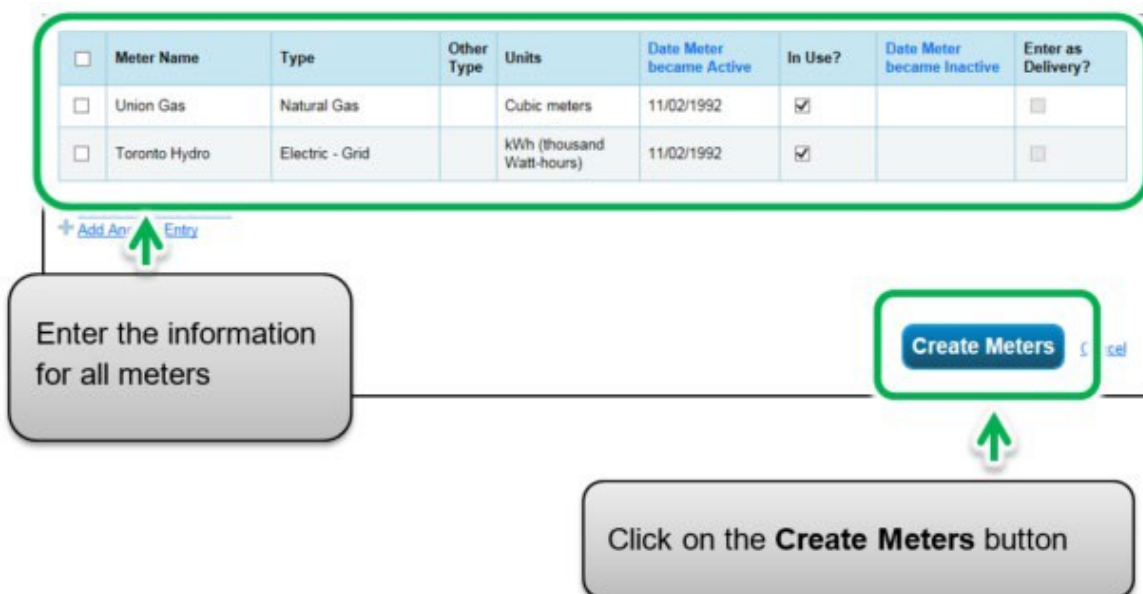
<input type="checkbox"/>	Meter Name	Type	Units	Date Meter became Active	In Use?
<input type="checkbox"/>	Union Gas	Natural Gas	Cubic meters		<input type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid			<input checked="" type="checkbox"/>

Select the unit of measure from the **Units** drop-down list

- Under the **Date Meter became Active** column, click on the calendar icon and select the date the meter became active. Portfolio Manager will only allow you to enter usage data with dates later than the date the meter became active.

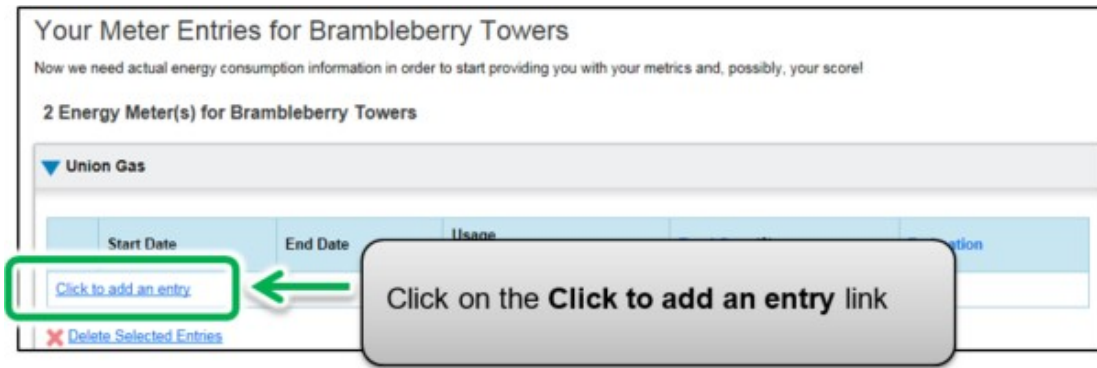


- If you have specified more than one energy source/meter type for the property, repeat steps 5 through 7 for each type.
- Once you have entered the necessary information for all meters, click the **Create Meters** button to confirm your changes and proceed to the next step.

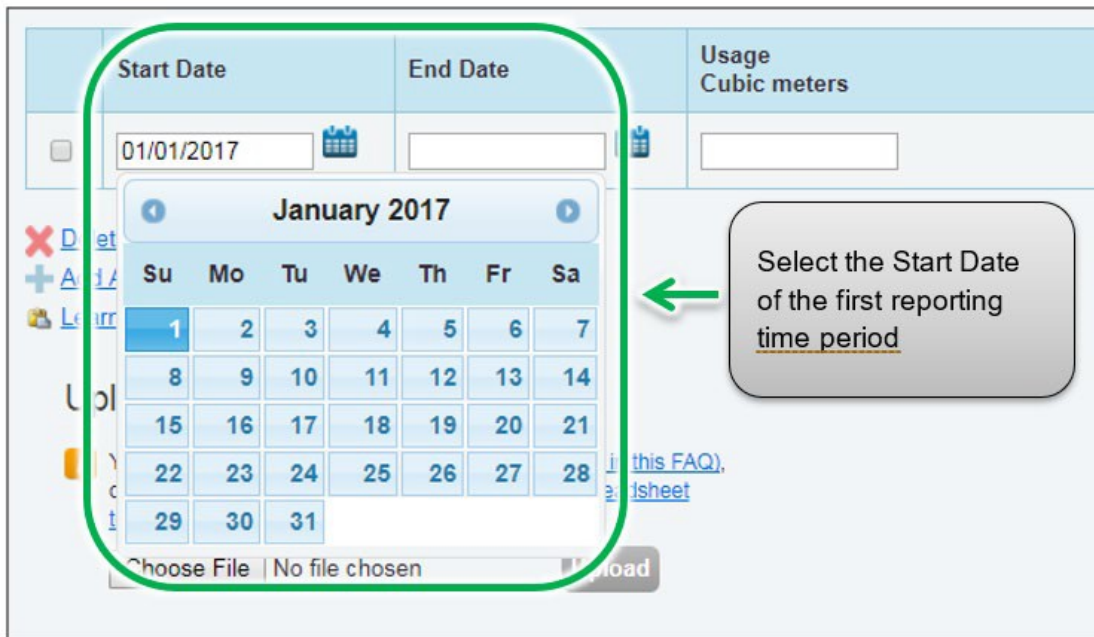




10. The screen will reload to show the **Your Meter Entries** page. In the section for the first meter, click on the **Click to add an entry** link.



11. Under the **Start Date** column, click on the calendar icon to select the start date for the first reporting time period for the meter.



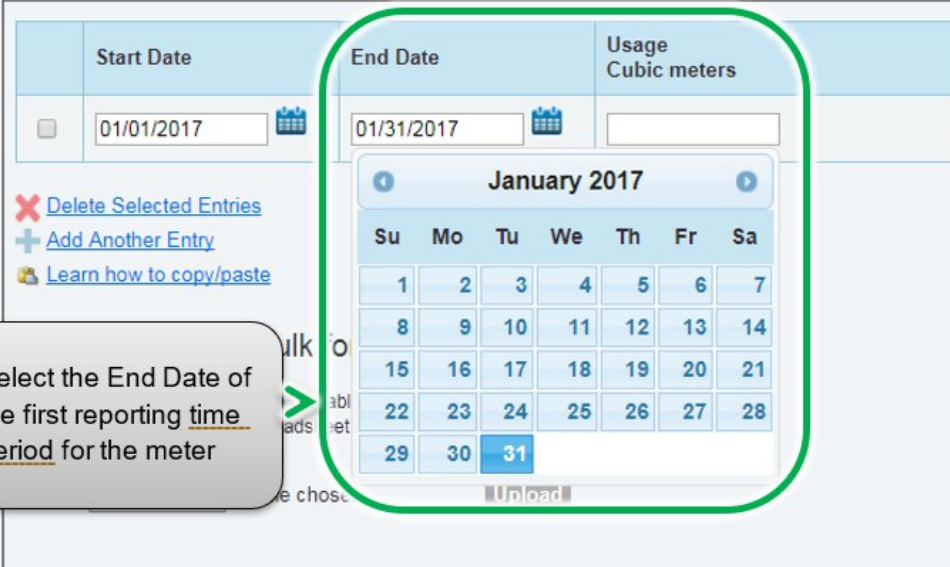
**Note:** If you are unable to obtain meter consumption data that begins on January 1 and ends on December 31, you can enter data that includes consumption outside of the reporting year. Portfolio Manager will then prorate the consumption data.

**Example:** You need to report your energy consumption from January 1, 2018 to December 31, 2018 and your billing cycle ends on the 20<sup>th</sup> of every month.

- The first reporting time period you enter will have a Start Date of December 21, 2017 and an End Date of January 20, 2018.
- The second reporting time period will have a Start Date of January 21, 2018 and an End Date of February 20, 2018.
- The final reporting time period will have a Start Date of December 21, 2018 and an End Date of January 20, 2019 (for a total of 13 monthly entries).

**Note:** Billing cycles cannot overlap. This will result in an error.

12. Under the **End Date** column, click on the calendar icon to select the end date of the first reporting time period for the meter. Whenever possible, report your usage using the smallest available time periods. Portfolio Manager cannot weather-normalize usage data reported in periods longer than 65 days and will not be able to calculate your building's energy use intensity.



The screenshot shows a data entry interface with three columns: Start Date, End Date, and Usage (Cubic meters). The Start Date is set to 01/01/2017 and the End Date is set to 01/31/2017. A calendar pop-up is open for January 2017, with the 31st selected. A callout box points to the 31st with the text: "Select the End Date of the first reporting time period for the meter". Below the calendar is an "Upload" button. On the left side of the interface, there are links for "Delete Selected Entries", "Add Another Entry", and "Learn how to copy/paste".

Start Date	End Date	Usage Cubic meters
01/01/2017	01/31/2017	

January 2017

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Upload

Select the End Date of the first reporting time period for the meter

13. Enter the consumption data for the selected reporting time period. If the building has not consumed energy at this meter or source during the time period, '0' must be entered.

	Start Date	End Date	Usage Cubic meters	Total Cost (\$)
<input type="checkbox"/>	1/31/2017	1/31/2017	5,603	

↑

Enter consumption data

**Note:** You can also enter your cost information in the **Total Cost** information field, but the BPS regulation does not require it.

14. Click on the **Add Another Entry** and repeat steps 11 through 13 for each reporting time period until you have finished entering consumption data for the full year. Ensure that the **Start Date** of your new entry is the same day, or one day after, the **End Date** of the previous entry.

	Start Date	End Date	Usage Cubic meters
<input type="checkbox"/>	1/31/2017	1/31/2017	5,603
<input type="checkbox"/>	<input type="text" value="02/01/2017"/>	<input type="text" value="02/28/2017"/>	<input type="text"/>

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

Click on the **Add Another Entry** link to enter additional reporting time periods

15. When you have completed entering consumption data for the full year in the section for the first meter, scroll to the section for the next meter (if you have more than one) and repeat steps 10 through 14 for each meter that makes up the property's energy use.
16. When you have entered all of the consumption data for all of the meters, click on the **Continue** button to proceed to the next step.
17. If you add more monthly entries at a later time, click on the **Save Bills** button when you have entered all of your usage data for the meter(s), then click on the name of your building at the top of the page to take you back to your building's Summary tab.
18. The page will reload to show the **Select Energy Meters to Include in Metrics** page. Select all the meters that make up the property's energy consumption and click on the **Apply Selections** button to complete the process and continue to the next section.

**Select Energy Meters to Include in Metrics**

Tell us which meters to include when calculating the Energy metrics for [Brambleberry Towers](#) so that we can provide you with the most accurate metrics possible.

**Summary**

2

Meters representing the total energy consumption for [Brambleberry Towers](#) (a single building).

**Energy Meters**

Select all meters to be included in your Energy metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

<input type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	<a href="#">Union Gas</a> 32780064	Natural Gas
<input checked="" type="checkbox"/>	<a href="#">Toronto Hydro</a> 32780065	Electric - Grnd

Total of 2 meter(s). Tell us what this represents:

- These meter(s) account for the total energy consumption for [Brambleberry Towers](#) (a single building).
- These meter(s) do not account for the total energy consumption for [Brambleberry Towers](#) (a single building).

Select all the meters that make up the property's energy consumption and click on the **Apply Selections** button

**Apply Selections**

## 2.5 Adding Volumetric Flow Rate of Water and Wastewater

The following are the steps to add volumetric flow rate information for properties related to the treatment of water or sewage that are operated by a municipal service board and/or a municipality.

1. If the operation is related to the treatment of water or sewage and is operated by a municipal service board and/or a municipality, the regulation requires additional information identifying the volumetric flow rate of water/sewage treated. The volumetric flow rate can be reported in millions of gallons per day or cubic meters per day. This information can be updated/edited in Portfolio Manager under the Plant Flow Rate Meters in the Details tab.
2. Continuing from the previous section, scroll to the top of the property profile page and click on the **Details** tab.

Click on the **Details** tab

Basic Information

**Construction Status:**  
Existing property that is one single building

**Property GFA - Self-Reported:**  
1 Sq. Ft.

**Occupancy:**  
95%

[Edit](#)

Property Uses and Use Details

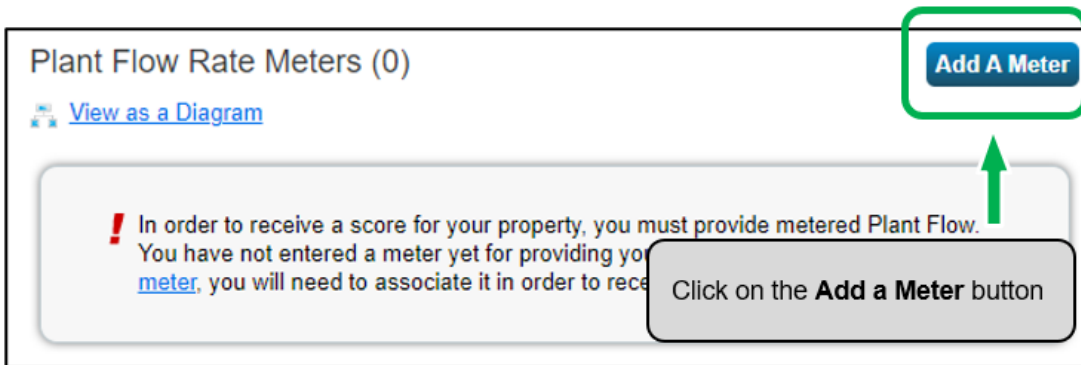
[View as Diagram](#)  [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Wastewater Treatment Plant	1 ft²	I want to... ▼

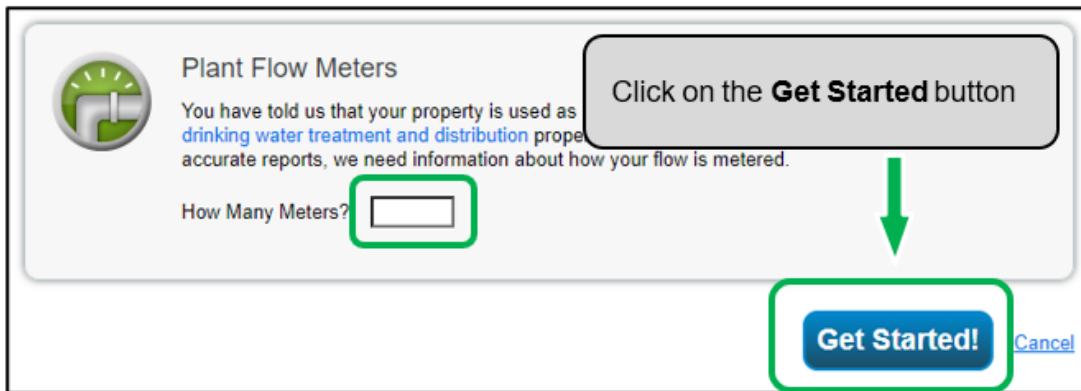
Property GFA (Buildings): 1 (used to calculate EUJ)

Property GFA (Parking): 0

3. Scroll to the lower part of the page and locate the **Plant Flow Rate Meters** section. Click on the **Add a Meter** button.




4. The screen will reload to show the **Plant Flow Meters** page. Enter 1 unless you want to report multiple meters, in which case report the number of plant flow meters you would like to report.



5. Click on the **Get Started!** button and proceed to the next step.

- The page will reload to show the building use that this plant flow rate meter applies to. Select building use and click on the **Get Started** button again.



### Plant Flow Meters

You have told us that your property is used as a [waste water treatment plant](#) or [drinking water treatment and distribution](#) property. In order to provide you with accurate reports, we need information about how your flow is metered.

How Many Meters?

Tell us which meters to include when calculating the total usage for this property so that we can provide you with the most accurate metrics possible.

Select the use that this plant flow meter applies to:

Meter Name	Associated Use
Average Influent Flow Meter #1	Building Use <span style="float: right;">▼</span>

Get Started!
[Cancel](#)

### About Your Meters for Wastewater Treatment Facility

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 Plant Flow Meter for Wastewater Treatment Facility (click table to edit)**

☐	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Custom Meter ID 1 Name	Custom Meter ID 1 Value
☐	Average Influent Flow Meter	Average Influent Flow				☑			

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

Back

Click on the **Meter Name** field and enter the desired label for the meter

Create Meters
Cancel

- Click the cell in the **Units** column. The fields for the meter will become active and you can select your preferred unit of measure for the meter type.

About Your Meters for Wastewater Treatment Facility

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 Plant Flow Meter for Wastewater Treatment Facility (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Custom Meter ID 1 Name
<input type="checkbox"/>		Average Influent		<div style="border: 1px solid green; padding: 2px;">           Cubic Meters per Day            Millions of Gallons per Day         </div>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

Select the unit of measure from the **Units** drop-down list

Back Create Meters [Cancel](#)

- Under the **Date Meter became Active** column, click on the calendar icon and select the date the meter became active. Portfolio Manager will only allow you to enter usage data with dates later than the date the meter became active.

About Your Meters for Wastewater Treatment Facility

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 Plant Flow Meter for Wastewater Treatment Facility (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Custom Meter ID 1 Name
<input type="checkbox"/>	Average Influent	Average Influent		Millions of Gal	<div style="border: 1px solid green; padding: 2px;">           February 2023            Su Mo Tu We Th Fr Sa            1 2 3 4            5 6 7 8 9 10 11            12 13 14 15 16 17 18            19 20 21 22 23 24 25            26 27 28         </div>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

Select the date the meter became active

Back Create Meters [Cancel](#)



- If you have specified more than one plant flow meter for the property, repeat steps 5 through 7 for each meter.

Once you have entered the necessary information, for all meters, click the **Create Meters** button to confirm your changes and proceed to the next step.

About Your Meters for Wastewater Treatment Facility

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 Plant Flow Meter for Wastewater Treatment Facility (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Custom Meter ID 1 Name
<input type="checkbox"/>	Average Influent	Average Influent		Millions of Gal	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

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

Click on the **Create Meters** button
→

- The screen will reload to show the **Your Meter Entries** page. In the section for the first meter, click on the **Click to add an entry** link.

Manage Bills (Meter Entries) for [Wastewater Treatment Facility](#)

Meter Selection:

[Basic Meter Information](#) (\*\*click on the arrow to the left to expand this section)

[Monthly Entries](#)

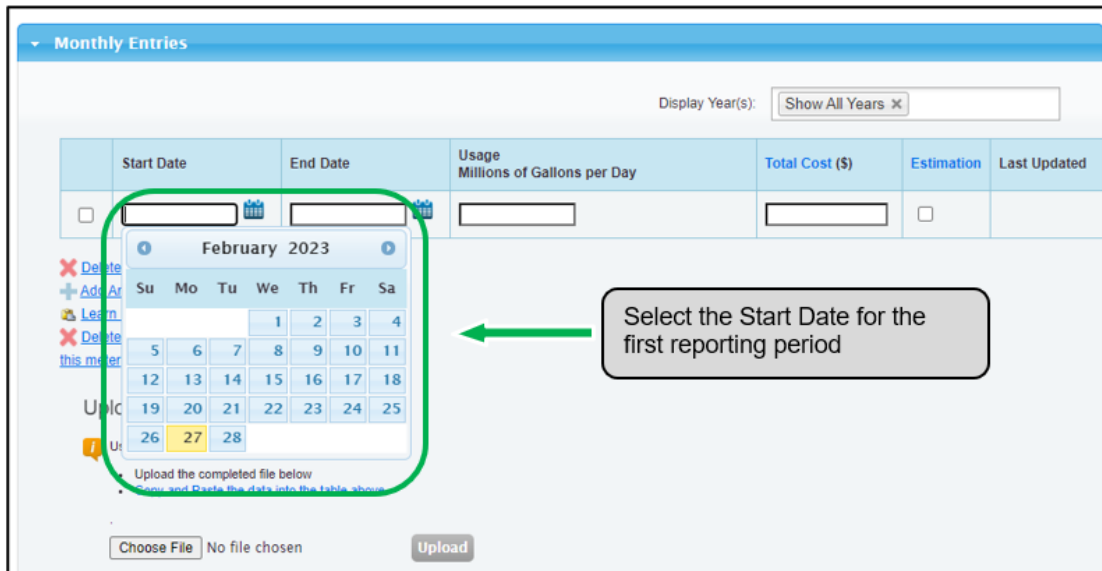
Display Year(s):

	Start Date	End Date	Us MI	Estimation	Last Updated
<a href="#">Click to add an entry</a>					

[Delete Selected Entries](#)  
[Add Another Entry](#)  
[Learn how to copy/paste](#)  
[Delete \\*\\*\\*\\*ALL\\*\\*\\*\\* Meter data for this meter](#)

Click on the **Click to add an entry** link to start entering data for the selected meter
←

12. Under the **Start Date** column, click on the calendar icon to select the start date for the first reporting time period for the meter.



**Note:** If you are unable to obtain flow rate data that begins on January 1 and ends on December 31, you can enter data that includes flow rate outside of the reporting year. Portfolio Manager will then prorate the data.

**Example:** You need to report your plant flow rate data from January 1, 2018 to December 31, 2018 and your billing cycle ends on the 20<sup>th</sup> of every month.

- The first reporting time period you enter will have a Start Date of December 21, 2017 and an End Date of January 20, 2018.
- The second reporting time period will have a Start Date of January 21, 2018 and an End Date of February 20, 2018.

- The final reporting time period will have a Start Date of December 21, 2018 and an End Date of January 20, 2019 (for a total of 13 monthly entries).

**Note:** Billing cycles cannot overlap. This will result in an error.

13. Under the **End Date** column, click on the calendar icon to select the end date of the first reporting time period for the meter. Whenever possible, report your usage using the smallest available time periods. Portfolio Manager cannot weather-normalize usage data reported in periods longer than 65 days and will not be able to calculate your building's energy use intensity.

The screenshot shows a web interface titled "Monthly Entries". At the top right, there is a "Display Year(s):" dropdown menu set to "Show All Years x". Below this is a table with columns: "Start Date", "End Date", "Usage Millions of Gallons per Day", "Total Cost (\$)", "Estimation", and "Last Updated". The "End Date" column has a calendar icon. A calendar for February 2023 is open, with a green box around it. A green arrow points from a text box on the right to the calendar. The text box contains the instruction: "Select the End Date for the first reporting period".

14. Enter the consumption data for the selected reporting time period. If the building has not consumed water at this meter during the time period, enter '0'.

The screenshot shows a web interface for 'Monthly Entries'. At the top right, there is a 'Display Year(s):' dropdown menu set to 'Show All Years'. Below this is a table with columns: 'Date', 'Usage Millions of Gallons per Day', 'Total Cost (\$)', 'Estimation', and 'Last Updated'. The 'Usage Millions of Gallons per Day' column is highlighted with a green box, and a callout box with the text 'Enter consumption data' and a green arrow points to it.

**Note:** You can also enter your cost information in the **Total Cost** information field, but the BPS regulation does not require it.


15. Click on the **Add Another Entry** link and repeat steps 11 through 13 for each reporting time period until you have finished entering consumption data for the full year. Ensure that the **Start Date** of your new entry is the same day, or one day after, the **End Date** of your previous entry.

The screenshot shows the same 'Monthly Entries' interface. Below the table, there are several links: 'Delete Selected Entries', 'Add Another Entry', and 'Delete \*\*\*\*ALL\*\*\*\* Meter data for this meter'. The 'Add Another Entry' link is highlighted with a green box, and a callout box with the text 'Click on the Add Another Entry link to enter additional reporting time periods' and a green arrow points to it.

16. When you have completed entering consumption data for the full year in the section for the first meter, scroll to the section for the next meter (if you have more than one) and repeat steps 10 through 14 for each meter that makes up the property's plant flow rate.

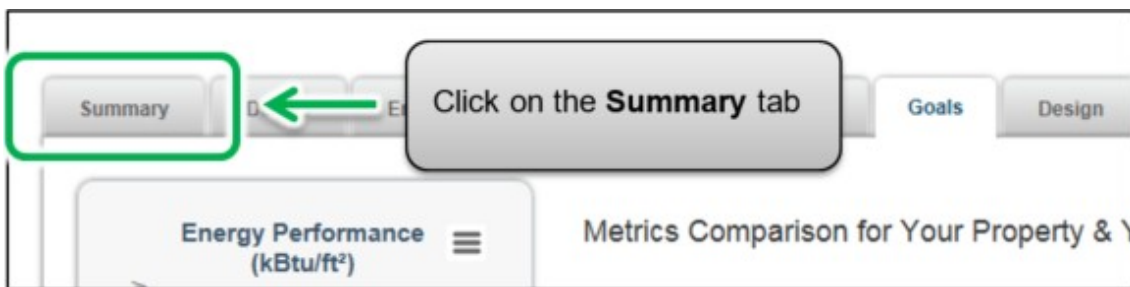
17. When you have entered all of the consumption data for all of the meters, click on the **Save Bills** button to save this entry.

## 2.6 Checking for Possible Errors

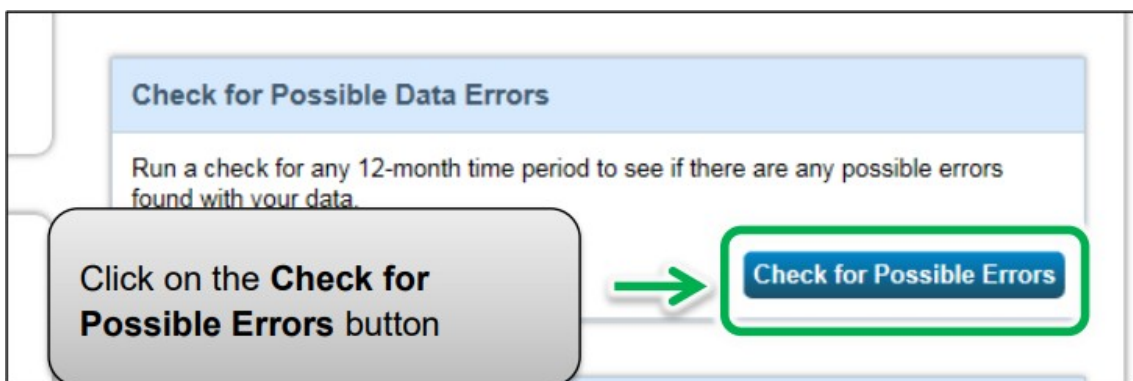
 **Important:** The Data Quality Checker is NOT a substitute for data verification because it does not identify all issues. See the next section for more details on data verification.

The following are the steps to check for possible errors in your property's profile.

1. Continuing from the previous section, scroll to the top of the page and click on the **Summary** tab.



2. The screen will reload to show the **Summary** tab page. Scroll down the page and locate the **Check for Possible Data Errors** section. Click on the **Check for Possible Errors** button.



3. The screen will reload to show the **Data Quality Checker** page. Select the **Year Ending** date for the error check – it will be December 31 of the year for which you are reporting data.

Data Quality Checker for [Brambleberry Towers](#)

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your links to view or correct your data as needed.

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: \* Dec 31 ▼ 2016 ▼ [Run Checker](#)

Select the **Year Ending** date for the error check

4. Click on the **Run Checker** button to initiate the property profile check.

Data Quality Checker for [Brambleberry Towers](#)

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your links to view or correct your data as needed.

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: \* Dec 31 ▼ 2016 ▼ [Run Checker](#)

5. The **Data Quality Checker** will notify you immediately if there are any issues with your data. Please attempt to fix all issues, particularly those marked with a red alert icon. You can follow the links in the alerts to view and correct your data as needed.

**Data Quality Checker for [Brambleberry Towers](#)**

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your year and click "run checker" to view or correct your data as needed.

**Select Timeframe & Run Checker**

We check data for a full year (12 months) of meter consumption (Metric Year). Select a **Year Ending Date** and click "run checker".

Year Ending:   [Re-Run Checker](#)

**! 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 (01/01/2016 - 12/31/2016).

- [Union Gas](#) (missing bills for 12/02)

**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.

[Help](#) **! Weekly Operating Hours appears unusual for the year selected.**

6. After you have addressed each of the alerts in the Data Quality Checker, click on the **Cancel** link at the bottom of the page to return to the **Summary** page.

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

- ! Weekly Operating Hours appears unusual for the year selected.**
- ! There is no identified weather station.**
- ! Property has no waste or material meters.**

[Cancel](#)



## 2.7 Adding Another Property

You have now completed the process for adding a single property to Portfolio Manager.

The following are the steps to add another property.

1. At the top of the page, click on the **MyPortfolio** tab to view all of your properties.



2. The screen will reload to show the **Portfolio Views** page. Here you can view all your properties and some summary metrics. If you have more properties to report, click on the **Add a Property** button and repeat the steps from the previous sections starting from section **2.1.1 Adding and Setting Up a Property**.



## 2.8 Submitting Your Report

After you have successfully added all your properties and their energy use information to Portfolio Manager, you can proceed to submit your report.

Each year, we provide BPS organizations with a unique reporting link via email or memo to submit their reports.

If your organization did not receive this link, please contact [bpssupport@ontario.ca](mailto:bpssupport@ontario.ca).

**IMPORTANT:** Please ensure that you have updated the contact information in your Portfolio Manager account settings from the default Ministry of Energy email to yours or that of another reporting lead at your organization. This email address will be sent a confirmation email along with an attachment of your completed report upon successful submission to the Ministry of Energy.

Completing the submission process:

1. [Log in to your Portfolio Manager account](#).
2. Click on the Portfolio Manager BPS submission link that you received by email.
3. The link will open a **Data Request** page. In the **About Your Response** section, select who the data is being submitted on behalf of. Select “myself” unless you are submitting data on behalf of a client.

Respond to Data Request: Data Request:BPS Annual Energy Reporting - 2023  
from Ontario Ministry of Energy Ontario Public Service (Ontario Ministry of Energy)

About this Data Request

Data Requested By: Ontario Ministry of Energy Ontario Public Service  
For help, contact: Ontario Ministry of Energy Ontario Public Service at [bpssupport@ontario.ca](mailto:bpssupport@ontario.ca) or 1-844-274-0689

Who is this data being submitted on behalf of?

myself  
 someone else

Select who the data is being submitted for

Responding to Data Requests  
You are viewing this screen because someone has asked you to provide data to them in the form of a data request. To respond, simply fill out the information on this screen and select what properties you wish to include (some decisions may have been made by the data requestor.)

Submitting Data for Someone Else  
Sometimes people delegate their responsibilities for responding to data requests to other people. If you are logging on behalf of someone else, select their name from your My Book so that they will be attributed to the response.

4. In the bottom part of the page, the **Your Response** section shows the timeframe of the request (this is specified by the Ministry of Energy and cannot be changed). From the **Properties** drop-down list, select one of the following options:

- b. **One Property** – You will be prompted to select a single property from your portfolio for the submission.
- c. **Multiple Properties** – You will be prompted to select a group of properties from your portfolio for the submission.
- d. **All Properties** – This option will include all properties from your portfolio for the submission.

Your Response

Select Information to Include:

Timeframe: \* Single Year Dec 31 2016

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

Properties: \* All Properties

**i** The data requestor may have asked for one or more standard IDs to be included with the property. Please include the requested standard IDs for each property before submitting your response.

**Generate Response Preview** [Cancel](#)

Select the desired option

5. Click **Generate Response Preview**.



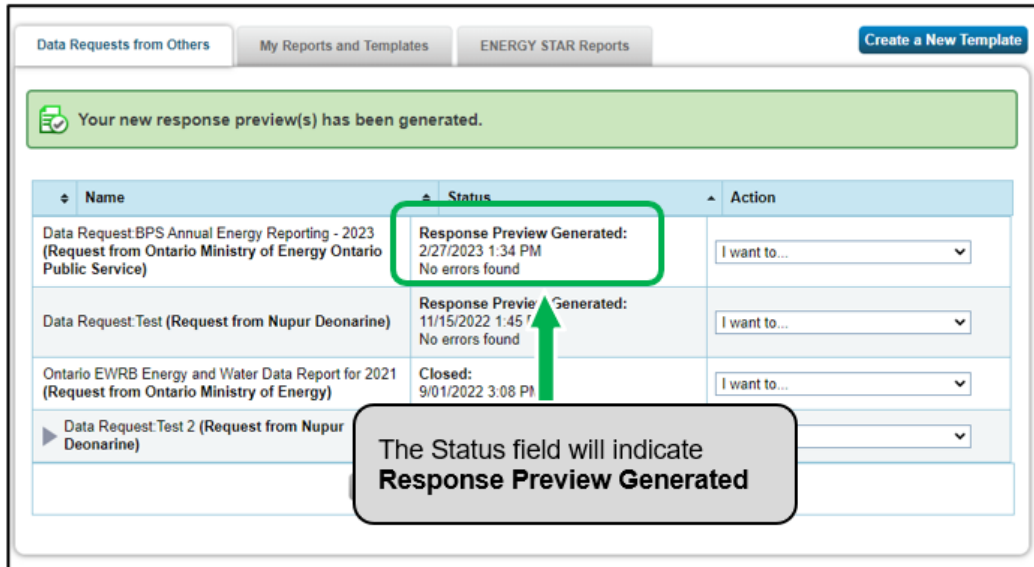
The Reporting tab will open with a status box explaining that your report is being generated.

A preview for your response to the data request "Data Request:BPS Annual Energy Reporting - 2023" on behalf of Nupur Deonarine (Ontario Public Service) is being generated.

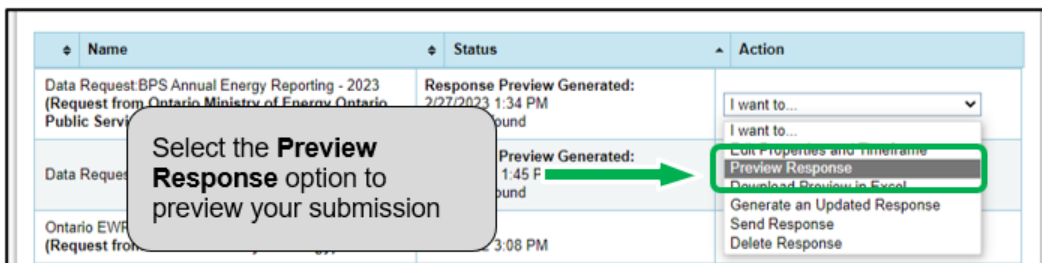
You may view your response preview by selecting "Preview Response" or "Download Preview in Excel" from the action menu below. Large responses may take a long time to prepare. After you have viewed your response, you must select "Send Response" in order for your data to be released.

Please note that each property you included should have a full 12 months of information for each timeframe. Otherwise, the metrics may not be able to be calculated. When this happens, "N/A" will be displayed in your response.

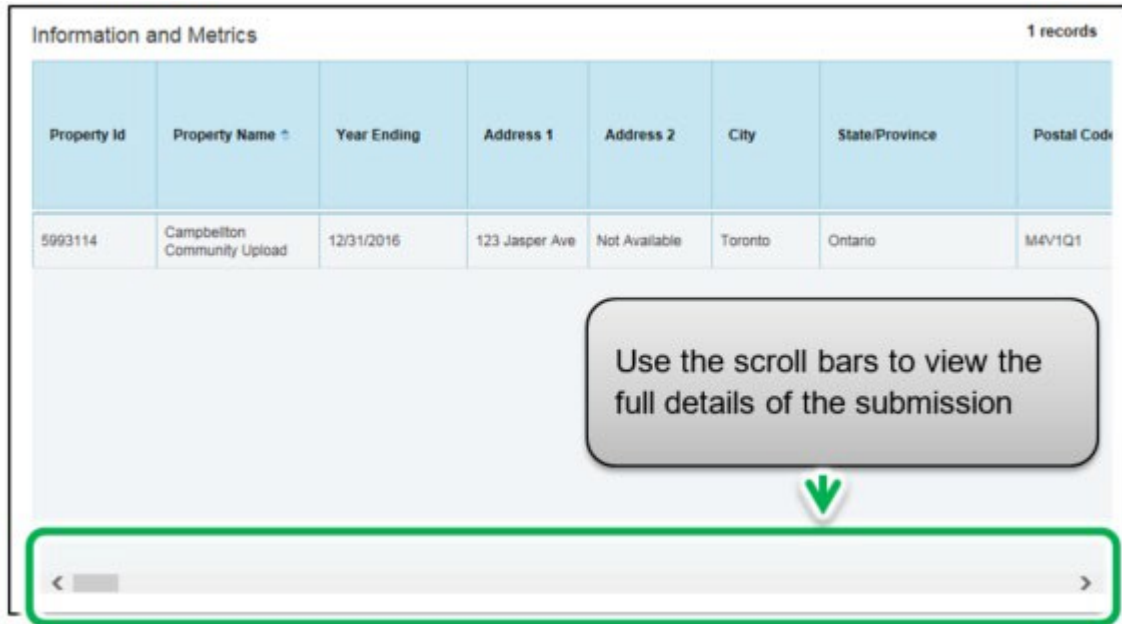
6. Scroll down the page and locate the **Templates & Reports** section. The **Status** field will indicate the “**Response Preview Generated**” message once the preview is generated.



7. From the **Actions** drop-down list, select the **Preview Response** option to preview your submission if you want to preview your response. Otherwise, go to step 9.



8. The **Reporting** tab will reload to show the **View Report** page. The page will include the **Information and Metrics** table displaying the property data that will be included in your submission. Use the page scroll bars to view the full details of the property data that will be submitted to the Ministry of Energy.



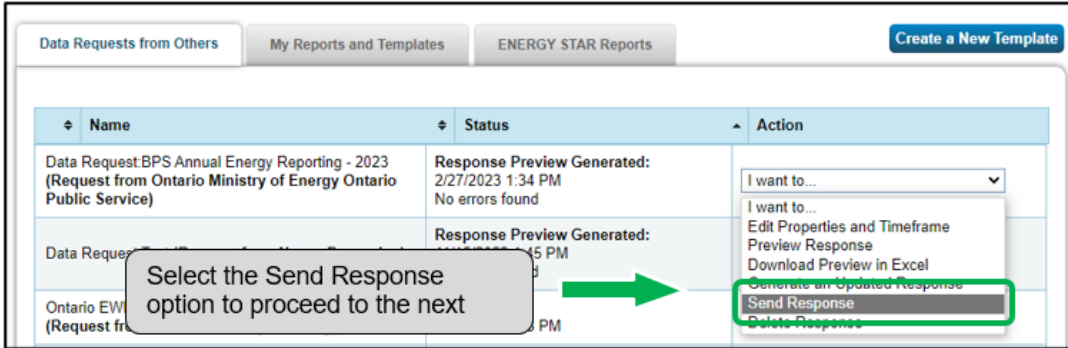
The screenshot shows a table titled "Information and Metrics" with 1 record. The table has 8 columns: Property Id, Property Name, Year Ending, Address 1, Address 2, City, State/Province, and Postal Code. The data row contains: 5993114, Campbellton Community Upload, 12/31/2016, 123 Jasper Ave, Not Available, Toronto, Ontario, and M4V1Q1. A callout box with a green arrow points to a scroll bar at the bottom of the table, with the text "Use the scroll bars to view the full details of the submission".

Property Id	Property Name	Year Ending	Address 1	Address 2	City	State/Province	Postal Code
5993114	Campbellton Community Upload	12/31/2016	123 Jasper Ave	Not Available	Toronto	Ontario	M4V1Q1

9. At the bottom of the page, click on the **Close** link to proceed.

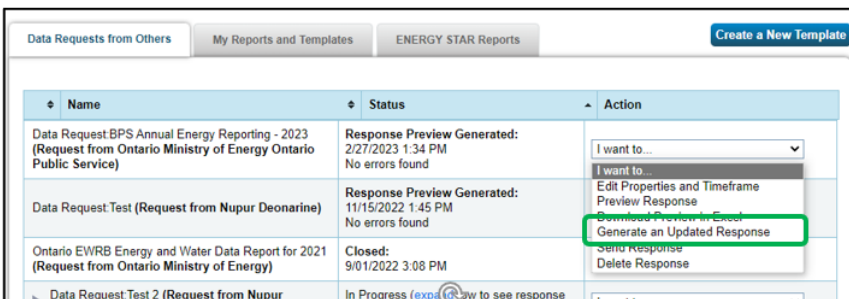


11. You will be returned to the Reporting tab. Scroll down to the **Templates & Reports** table and locate the generated data request. Select the **Send Response** option from the **Action** drop-down list to proceed to the next step.



**Important:** In some cases, you may want to add or update information after you have already sent your submission to the

Ministry of Energy (for example, if you realize that your information is incomplete, or something has changed since you submitted your information). To do this, first update only the property information you want to change. Then from the Reporting tab scroll down and locate the data request response you want to update. Select Generate an Updated Response from the Action drop-down list and proceed to the next step.



12. Once you have selected the **Send Response** option, you will be brought to a response confirmation page. Under section “1”, from the **Select contacts** list box, select the people from your contact book you wish to send a confirmation email to. In the **Additional Email Addresses** box, enter the email addresses of the people you wish to send a confirmation email to who are not listed in your contact book.

Confirm Response to Data Request from Ontario Ministry of Energy

By clicking Send Data, you will release data to Ontario Ministry of Energy (Ontario Ministry of Energy). You will receive a copy of the data attached.

**1** Who (besides you) should we send a confirmation email to?

Select contacts from your contacts book:

Luc Besner (RRE Admin)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection.

Optional- Additional Email Addresses:

joe@gmail.com

Select the individuals from your contact book who you wish to send a confirmation email to

Enter the email addresses of the individuals who are not in your Portfolio Manager contact book

13. Under the “2” section, select the **Excel** option as the email attachment format.

**2** What format would you like your data in for the email attachment?

Excel

XML

Select the **Excel** option



14. In section “3”, select the checkbox to confirm the release of your data to the Ministry of Energy. Enter your **Username** and **Password** and then click on the **E-Sign Response** button to give your consent.

The screenshot shows a web form titled "3 E-Sign your Data Response". At the top, a grey callout box with a downward arrow says "Select the checkbox to confirm the release of your data to the Ministry of Energy". The form contains a checkbox with the text "I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Ontario Ministry of Energy with Ontario Ministry of Energy." Below this are two input fields: "Your username:" and "Your password:". A green box highlights the checkbox and the input fields. A blue button labeled "E-Sign Response" is positioned to the right of the password field. At the bottom right of the form are buttons for "Send Data" and "Cancel". A green upward arrow points to the "E-Sign Response" button. A second grey callout box at the bottom says "Enter your Username and Password and then click on the E-Sign Response button to give your consent".

Select the checkbox to confirm the release of your data to the Ministry of Energy

**3** E-Sign your Data Response

I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Ontario Ministry of Energy with Ontario Ministry of Energy.

Your username:

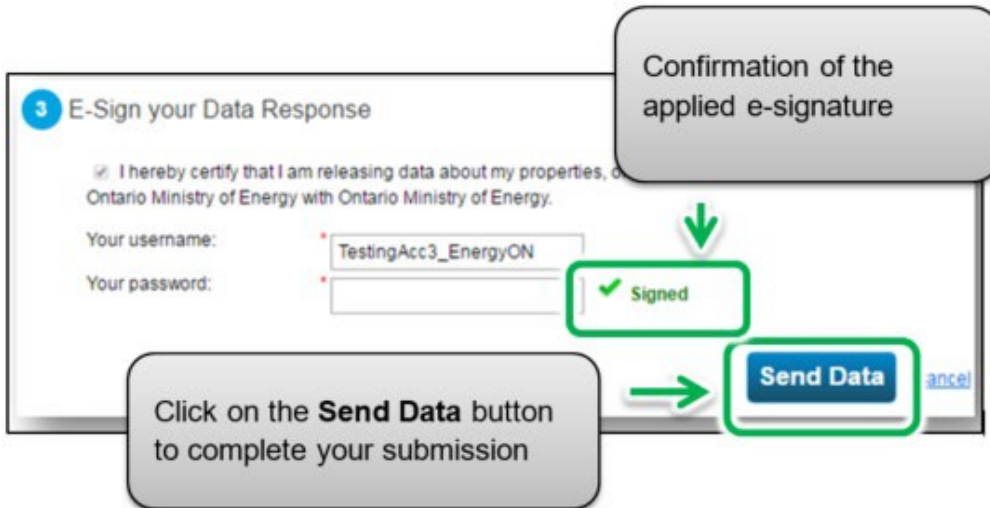
Your password:

**E-Sign Response**

**Send Data** [Cancel](#)

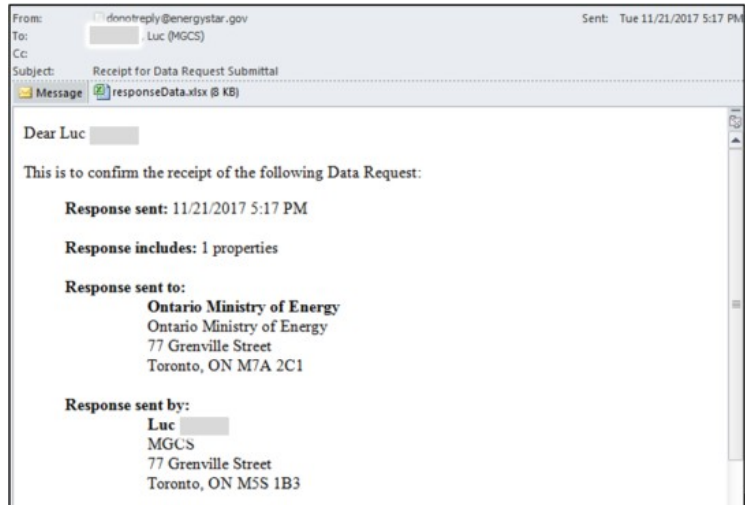
Enter your **Username** and **Password** and then click on the **E-Sign Response** button to give your consent

15. If your entry is successful, the page will reload to show a green checkmark as a confirmation of your e-signature. Click on the **Send Data** button. When prompted to confirm, click on the **Continue** button.



The page will reload to show a message confirming that your submission was completed successfully.

You will receive a confirmation email from Portfolio Manager with a receipt and copy of the data that you submitted as an attachment.



Congratulations, you have completed your requirement to report for the year!

We would like to remind BPS organizations that they are not obligated to publicly share their generated reports on their website. It is entirely optional and up to their discretion.

## Definitions

**Energy Star Score** – The Energy Star Score helps building owners understand their energy consumption and how they are performing by comparing their usage to similar buildings nationwide. A score of 75 or higher indicates that your building is a top performer and your building may be eligible for Energy Star Certification. The [Energy Star](#) website provides more details on how Energy Star Scores are calculated.

**Energy Use Intensity (EUI)** – EUI describes a building's energy use as a function of its size or other characteristics. For property types in Portfolio Manager, EUI is expressed as energy per square foot per year. It's calculated by dividing the total energy consumed by the building in one year (measured in kBtu or GJ) by the total gross floor area of the building (measured in ft<sup>2</sup> or m<sup>2</sup>).

**BPS Energy Reporting** – Acronym for the Broader Public Sector Energy Reporting initiative for the Ministry of Energy. The BPS energy reporting initiative collects annual energy consumption information from public agencies in Ontario.

**BPS Reporting Period** – BPS Reporting Period refers to the yearly reporting period from January 1<sup>st</sup> to July 1<sup>st</sup>. During the reporting period, public agencies are required to submit their annual energy consumption information through Portfolio Manager.

**Portfolio Manager** – Portfolio Manager is a third-party application by Energy Star. It is the data entry and collection application for public agencies to report their annual energy consumption information.