

Steps to set up ESPM

Collect Property Details

Before a property can be entered into ENERGY STAR Portfolio Manager (ESPM), the participant should compile key operational details for their building(s). The following are required for each property:

- Property Name
- Property Address
- Total Gross Floor Area of Property / Number of Buildings
- Year Built
- Occupancy
- At least 12 Months of Whole-Building Energy Data Covering All of 2025

Some building types that are eligible to receive an ENERGY STAR Score; this list can be found at [Property Types Eligible to Receive a 1-100 ENERGY STAR Score](#). If the property is eligible for a score, the participant will need to gather additional operational details for their property type. Each eligible building uses a distinct set of operational details to calculate the building's score. The specific details required for each property type can be found at [Portfolio Manager Data Collection Worksheet](#).

Using ENERGY STAR Portfolio Manager (ESPM)

1. Create an ESPM Account

To create an account, visit the login page at:

<https://portfoliomanager.energystar.gov/pm/login.html>

- Select Create a New Account.
- Fill out the required information (use the same e-mail address as the one used for the initial application)
- Select Create My Account.

2. Add Your Properties

On the MyPortfolio tab, on the top right corner, select Add a Property.



Follow the steps laid out and fill out the required information collected in Step 2. Leave the Standard IDs section empty. You should gather and enter accurate information for as many Property Use Details as possible. If accurate data is unavailable, Portfolio Manager will apply default values. Any estimated information should be identified by selecting the “Temporary Value” checkbox.

- Note that Gross Floor Area does NOT include the parking areas.
- If you have interior or exterior parking, be sure to check the relative box at the bottom of the screen.

3. Property Uses and Use Details

After adding your property, click on the name of your property from the dashboard and head to the Details tab.

Dashboard (Metrics current as of 10/14/2025 04:54 PM EDT) [Search by ID or Name](#)

TEST (1) [Energy Highlights](#) [Refresh Metrics](#)

[Add/Edit/Delete Groups](#) [Add/Edit/Delete Views](#)

Name	Energy Current Date	ENERGY STAR Score	Site EUI (GJ/m ²)	Source EUI (GJ/m ²)
Test Building 78901693				

First Previous Page 1 of 1 Next Last 100 View 1 - 1 of 1

Properties (185) (Count includes 4 child properties. Expand carets to view.) [Download Data Table](#)

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Test Building [Change Metric](#)

Test Ave N, Saskatoon, SK S0K 0K0 | [Map It](#)

Portfolio Manager Property ID: 78901693

Year Built: 2023 [Edit](#)

ENERGY STAR Score (1-100)

Current Score: [N/A](#)

Baseline Score: [N/A](#)

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

Basic Information

Construction Status:
Existing property that is one single building

Property GFA - Self-Reported:
2,000 Sq. M.

Occupancy:
100% [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	2,000 m ²	I want to...
Custom Use Details (Learn More)			I want to...

In this section you can also add, edit, or remove Use Types. In general, only include the minimum number of Property Uses needed to describe how the building functions.

For example, in a large office building with a small ground-floor coffee shop, it is not necessary to enter the coffee shop as a separate Property Use, since it supports the primary office function and has a similar energy-use profile. However, if a building has two distinct primary functions (such as being split between office and hotel space), or includes a swimming pool, those uses should be entered separately.

4. Create Energy and Water Meters

After adding your property and filling in the operational details, it is time to add the associated meters to each building.

4.1 Go to the Energy tab and select Add a Meter

The screenshot shows the 'MyPortfolio' interface for a 'Test Building'. The 'Energy' tab is selected and highlighted with a red box. The interface includes a 'Meter Summary' section on the left, a 'Meters - Used to Compute Metrics (0)' section on the right, and a 'Not currently eligible for ENERGY STAR Recognition' badge. The 'ENERGY STAR Score (1-100)' section shows 'Current Score: N/A' and 'Baseline Score: N/A'. The 'Add A Meter' button is highlighted with a red box. The 'Meter Summary' section states '0 Energy Meters Total' and 'In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.' The 'Meters - Used to Compute Metrics (0)' section includes a 'View as a Diagram' link and a message: 'There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. Enter information about your energy meters to begin tracking energy usage. After entering the meter, you will need to choose to include it in your metrics.' The 'Add A Meter' button is located in the top right corner of the 'Meters' section.

4.2 On the setup screen, select the sources of your property's energy (typically Electric and Natural Gas). Meters for multiple commodities can be created at the same time. Click Get Started.

Get Started Setting Up Meters for Test Building

There are five ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. Fourth, you can [hire a company to update your data electronically](#). And finally, you can see if your [utility offers the service to update your energy data automatically](#).



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 from onsite solar panels
 - ☐ generated from onsite wind turbines
- ☒ Natural Gas
 - How Many Meters?
- ☐ Propane
- ☐ Fuel Oil (No. 2)
- ☐ Diesel
- ☐ District Steam



Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.



Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More](#)

- 4.3 Click in the table cell to activate the menus. Enter the Units (Cubic Meter for Gas and thousand Watt-hours for Electricity), Date Meter Became Active (that is the date of the very first bill) and update the Meter Name if needed. You can leave the other fields empty. When finished, select Create Meters.

About Your Meters for Test Building

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.

2 Energy Meters for Test Building (click table to edit)

☐	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Met ID 1 Name
☐	Natural Gas	Natural Gas		cm (cubic meters)	12/01/2025	☒		☐	
☐	Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	12/01/2025	☒		☐	

[Delete Selected Entries](#)

[Add Another Entry](#)

[Back](#)

[Create Meters](#)

[Cancel](#)

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- 4.4 Select the meters that should be used to calculate your building's energy metrics (typically all of them) and whether the selected meters account for the building's entire energy consumption (typically yes). Select Apply Selection.

MyPortfolio

Sharing

Reporting

Recognition

Your meters have been created! Please indicate below if these meters should be included in your property's metrics.

Select Meters to Include in Metrics

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

Summary

2

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

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

Energy Meters

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

	Name Meter ID	Type
☒	Natural Gas 304009175	Natural Gas
☒	Electric Grid Meter 304009176	Electric - Grid

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

* ☒ These meter(s) account for the total energy consumption for [Test Building](#) (a single building).

☐ These meter(s) do not account for the total energy consumption for [Test Building](#) (a single building).

Apply Selections

- 4.5 A green banner will confirm you have successfully associated your meter with your property. The new opened window is for adding bills. If you are not ready to enter your bills, select Cancel or click on the big ENERGY STAR Portfolio Manager logo on the top right side to go back to the main page. If you are ready to enter your bills, continue to the next step of this document.



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Manage Bills (Meter Entries) for [Test Building](#)

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

Meter Selection: Natural Gas - 304009175

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

Monthly Entries

Display Year(s): Show All Years

	Start Date	End Date	Usage cm (cubic meters)	Percent Renewable Gas	Total Cost (\$)	Estimation	Last Updated
Click to add an entry							
✖ Delete Selected Entries + Add Another Entry ? Learn how to copy/paste ✖ Delete ****ALL**** Meter data for this meter							
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 Choose File No file chosen Upload							

Save Bills Cancel

5. Create Water Meters

The process of adding water meters is very similar to adding energy (gas and electricity) meters.

- 5.1 Instead of going to the Energy tab, navigate to the water tab and select Add a Meter.

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Test Building

Test Ave N, Saskatoon, SK S0K 0K0 | [Map It](#)
Portfolio Manager Property ID: 78901693
Year Built: 2023 | [Edit](#)

Not currently eligible for ENERGY STAR Recognition

Change Metric

ENERGY STAR Score (1-100)

Current Score: [N/A](#)
Baseline Score: [N/A](#)

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

Water Use Intensity (All Water Sources) (m³/m²)

Current WUI: [N/A](#)
Baseline WUI: [N/A](#)

Water Meters - Used to Compute Metrics (0) | [Add A Meter](#)

[View as a Diagram](#)

! In order to receive water metrics for your property, you must provide water meters. You have not entered any meters yet. After [entering the meter](#), you will need to [associate](#) it to receive metrics.

5.2 On the setup screen, select the sources of your property's water (typically Municipally Supplied Potable Water). If all the property's water use is indoors, choose Indoor. If there is any outdoor water use (usually irrigation), then:

- choose Outdoor if the outdoor water is measured by a separate meter, or
- choose Mixed Indoor/Outdoor if the same meter measures both indoor and outdoor water use.

5.3 Select Get Started.

5.4 Follow the same steps outlined in 4.3, 4.4, and 4.5 for creating Energy meters.

- Typically, the water unit is in Cubic Feet

6. Enter Bills

Now that your meters are set up, enter your utility bills as monthly entries (not quarterly or annual). Monthly bills show changes over time and give the most accurate results, especially when comparing performance across seasons, accounting for weather, and tracking improvements year to year.

You should enter at least 2 years of billing data (or as far back as you've owned and had the property operating). More history is even better.

To gather your billing information, log in to your utility provider websites:

- SaskEnergy
- SaskPower
- Saskatoon Water
- Saskatoon Light & Power

For each bill, you must enter:

- the billing period (start and end dates), and
- the usage/consumption.

Entering costs is optional but strongly recommended so you can also see spending trends and measure financial savings over time.

- 6.1 Navigate to the Energy or Water tab and select the meter that you are entering bills for.

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Test Building

Test Ave N, Saskatoon, SK S0K 0K0 | [Map It](#)
Portfolio Manager Property ID: 78901693
Year Built: 2023 | [Edit](#)

Not currently eligible for ENERGY STAR Recognition

Change Metric

ENERGY STAR Score (1-100)

Current Score: [N/A](#)
Baseline Score: [N/A](#)

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

Meter Summary

2 Energy Meters Total
2 - Used to Compute Metrics

[Add A Meter](#)

Current Energy Date
Not Available

[Enter Your Bills](#)

Meters - Used to Compute Metrics (2)

[Change Meter Selections](#)
[View as a Diagram](#)

[Add A Meter](#)

Meter Name Portfolio Manager Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter 304009176	Electric - Grid		Yes
Natural Gas 304009175	Natural Gas		Yes

- 6.2 Select Click to Add an Entry, then fill in the following fields:
- Start Date and End Date (exactly as shown on the bill)
 - Usage
 - Total Cost
 - Check mark if the bill is estimated
 - Electricity only: if your bill includes demand (kW) and demand charges, enter those as well
- 6.3 Select Add Another Entry to add multiple bills at the same time

Manage Bills (Meter Entries) for [Test Building](#)

Meter Selection: Electric Grid Meter - 304009176

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

Monthly Entries

Display Year(s): Show All Years ✕

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Demand (kW)	Demand Cost (\$)	Last Update
☐					☐			

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

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

No file chosen

[Cancel](#)

6.4 Make sure there are no gaps or overlapping dates

6.5 When done, select Save Bills

Note that you can use the drop-down menu labeled Meter Selection to navigate between your meters swiftly. You can also edit the meter's name, units, and the date the meter became active by selecting the Basic Meter Information.

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Manage Bills (Meter Entries) for [Test Building](#)

Meter Selection: Electric Grid Meter - 304009176

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

Monthly Entries

Display Year(s): Show All Years ✕