

## Obtain Energy Meter Usage Data – Xcel Energy

You will need energy data that covers all of the energy used by all building systems and occupants during the time period from January 1 to December 31 of the reporting year to benchmark your building. Because of when your meters are read, it is best to collect your billing data from December of the year prior to the reporting year to January of the year following the reporting year.

Previous Reporting Year	Reporting Year														Following Year
←	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	→
	If utility bill begins in Dec. and ends in Jan, include this bill info in reporting.	Include this bill info (energy or water consumption) in reporting.												If utility bill begins in Dec. and ends in Jan, include this bill info in reporting.	

If you are the **sole tenant or are the only Xcel Energy customer of record** in your building, you can:

- 1) Set up automated data transfers from Xcel Energy to ENERGY STAR Portfolio manager through Xcel Energy’s Benchmarking Portal, available through their Business Solutions center:  
[https://www.xcelenergy.com/staticfiles/xcelenergy/PDF/Marketing/Business\\_Solutions\\_Benchmark-User-Guide.pdf](https://www.xcelenergy.com/staticfiles/xcelenergy/PDF/Marketing/Business_Solutions_Benchmark-User-Guide.pdf)
- 2) Download data from the My Account portal on the Xcel Energy website and following the directions in Appendix A. My Account is located at the following URL: <https://myaccount.xcelenergy.com/>
- 3) Collect monthly billing statements from personal records management systems.
- 4) Request these 14 months of usage from your Account Manager or by calling the Business Solutions Center at 1-800-481-4700. The expected turn around time for your data should be within ten days.

If there are **multiple individually-metered Xcel Energy customers** in the building, the ordinance contains a provision that requires tenants to provide utility information to the building owner upon request. You can:

- 1) Obtain the usage data from each tenant individually. Each tenant can follow any of the options identified above.
- 2) Set up automated data transfers from Xcel Energy to ENERGY STAR Portfolio manager through Xcel Energy’s Benchmarking Portal, available through their Business Solutions center:  
[http://www.xcelenergy.com/Energy\\_Solutions/Business\\_Solutions/Energy\\_Benchmarking](http://www.xcelenergy.com/Energy_Solutions/Business_Solutions/Energy_Benchmarking)

- 3) Request Xcel Energy to collect this information and provide a single digital report for the entire building. Follow the directions in Appendix B. If you have 4 or less tenants, this option requires each customer to complete and sign a copy of the Customer Consent Form included in Appendix C. Otherwise, if you have more than 4 tenants, you do not need to collect consent forms unless a single tenant makes up more than 50% of the usage in a given month. In that case a consent will be required from those tenants.

Once all energy usage data has been obtained, follow the instructions in Step 6 of the Portfolio Manager Guide to upload this information into Portfolio Manager.

## Appendix A – Obtaining Usage Data via the My Account Portal

Obtain your electricity use directly online by accessing your account from the My Account portal on the Xcel website at the following URL:

<https://myaccount.xcelenergy.com/>

If you already have an account, you can log in or you can sign up for an account using your Xcel Energy account number, phone number associated with the account, and zip code of the premises.

Once you have signed in to your account, you will land on the Overview tab of Your Account page.

The screenshot shows the 'YOUR ACCOUNT -' page with a navigation bar containing 'My Energy', 'Payment Options', and 'Account Dashboard'. The 'My Energy' button is circled in red. Below the navigation bar are tabs for 'Overview', 'Your Programs', 'Current eBill', 'Bill History', and 'eBill Settings'. The 'Current eBill' tab is active, displaying 'Your Bill' and 'eBill' sections. The 'Your Bill' section includes a comparison to the previous statement showing a credit of \$8.18, a current balance of \$0.00, and a due date of 03/16/2015. It also lists the name on account, last payment, and last statement amount due. The 'eBill' section provides instructions on how to view the bill online and shows current premises information. A 'Pay Bill' button is visible. The 'Your Last Statement Charges' section lists credit, electricity service, and taxes & fees. The 'eBill' section also features a comparison of energy usage between 'Efficient Neighbors', 'You', and 'All Neighbors'.

Compared to Previous Statement:	Current Balance:	Due Date:
\$8.18	\$0.00	03/16/2015

Item	Amount
Credit	-\$39.39
Electricity Service	\$71.02
Taxes & Fees	\$8.95

Category	Usage (kWh)
Efficient Neighbors	545
You	552
All Neighbors	1,060

Click on the green My Energy button to view the following screen.

Home **My Energy Use** What Uses Most Compare My Bills My Goal My Plan Ways to Save

## Welcome

How you're doing: Dec 13—Jan 15

**You used 1% more than your efficient neighbors**

Efficient neighbors	545 kWh
You	552 kWh
All neighbors	1,060 kWh

Great 😊😊  
 > Good 😊  
 More than average

[Who are my neighbors?](#) [Explore my usage](#)

You should then click on the **My Energy Use** tab in the top toolbar. This will lead you to your my Energy Use page.

### My Energy Use

My Energy Use  
 Fuel type: electricity

Mar 2014 – Feb 2015  
 My neighbor comparison

Select view: by year

Find tips to reduce your use:

- [Free steps to take](#)
- [Smart purchases](#)
- [Great investments](#)

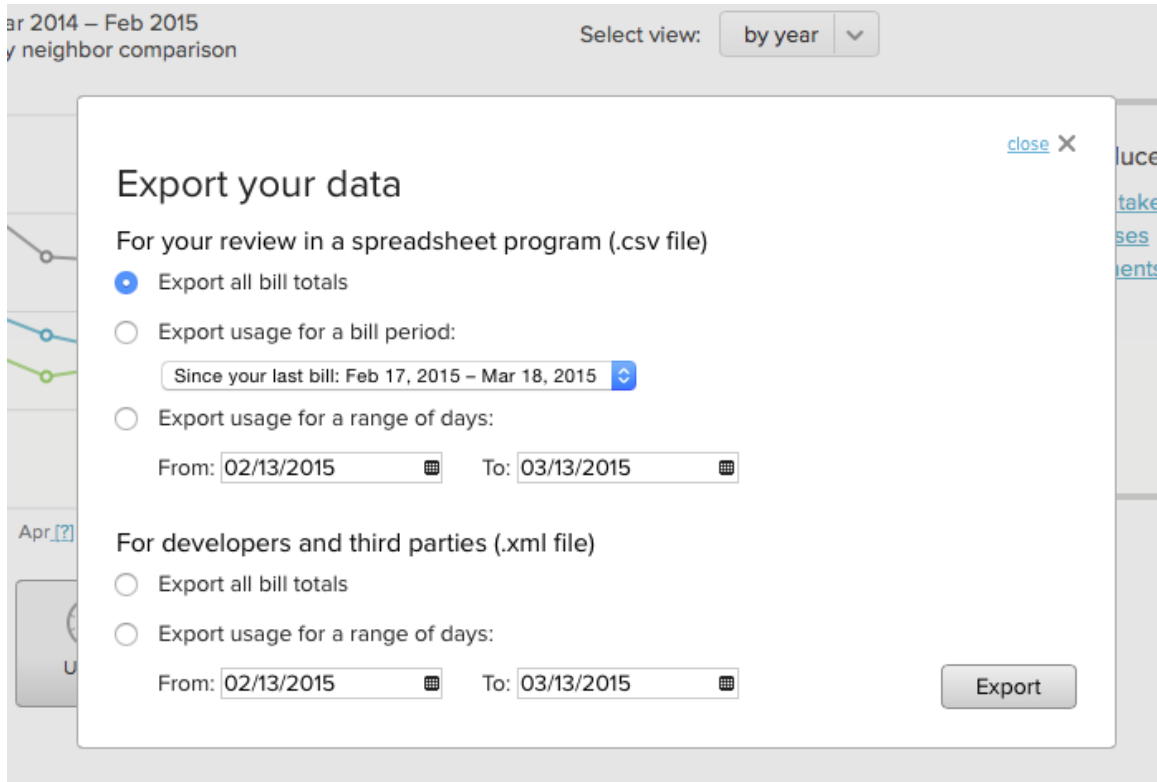
Neighbors Usage Weather

You  
 All neighbors  
 Efficient neighbors  
[Who are my neighbors?](#)

Note: The amounts shown here are usage charges only. They do not include taxes or fees, so they may not match your total billed amounts each month.

[Green Button Download My Data](#)

Click on the **Green Button Download My Data** button on the lower right of the page. A window appears to let you export your data to a .csv spreadsheet file.



Choose **Export all bill totals** and then click on the **Export** button. A file called BillingData.zip should download onto your computer. When you open the zip file, a file called ElectricBillingData.csv should be extracted. The contents of the file when opened in Excel will look like this:

	A	B	C	D	E	F	G
1	Service	Service 1					
2	Name						
3	Address						
4	Account Number						
5							
6	TYPE	START DATE	END DATE	USAGE	UNITS	COST	NOTES
7	Electric billing	6/16/11	7/17/11	758 kWh		\$94.01	
8	Electric billing	7/18/11	8/14/11	628 kWh		\$78.83	
9	Electric billing	8/15/11	9/13/11	577 kWh		\$73.72	
10	Electric billing	9/14/11	10/12/11	303 kWh		\$40.45	
11	Electric billing	10/13/11	11/10/11	299 kWh		\$36.59	
12	Electric billing	11/11/11	12/13/11	416 kWh		\$48.68	
13	Electric billing	12/14/11	1/16/12	479 kWh		\$58.33	
14	Electric billing	1/17/12	2/14/12	369 kWh		\$45.81	
15	Electric billing	2/15/12	3/14/12	327 kWh		\$41.24	
16	Electric billing	3/15/12	4/15/12	311 kWh		\$39.44	
17	Electric billing	4/16/12	5/14/12	267 kWh		\$33.67	
18	Electric billing	5/15/12	6/13/12	394 kWh		\$48.55	
19	Electric billing	6/14/12	7/15/12	728 kWh		\$89.62	
20	Electric billing	7/16/12	8/13/12	543 kWh		\$68.97	
21	Electric billing	8/14/12	9/12/12	432 kWh		\$56.96	
22	Electric billing	9/13/12	10/11/12	305 kWh		\$41.35	
23	Electric billing	10/12/12	11/11/12	350 kWh		\$43.09	
24	Electric billing	11/12/12	12/12/12	365 kWh		\$44.77	
25	Electric billing	12/13/12	1/15/13	539 kWh		\$65.30	
26	Electric billing	1/16/13	2/13/13	406 kWh		\$53.76	
27	Electric billing	2/14/13	3/14/13	372 kWh		\$49.86	
28	Electric billing	3/15/13	4/15/13	375 kWh		\$50.11	
29	Electric billing	4/16/13	5/14/13	313 kWh		\$44.24	
30	Electric billing	5/15/13	6/13/13	334 kWh		\$49.28	
31	Electric billing	6/14/13	7/15/13	602 kWh		\$85.87	
32	Electric billing	7/16/13	8/13/13	463 kWh		\$67.39	
33	Electric billing	8/14/13	9/12/13	679 kWh		\$93.97	
34	Electric billing	9/13/13	10/13/13	405 kWh		\$56.74	
35	Electric billing	10/14/13	11/11/13	321 kWh		\$44.45	
36	Electric billing	11/12/13	12/12/13	443 kWh		\$56.60	
37	Electric billing	12/13/13	1/15/14	552 kWh		\$71.02	
38	Electric billing	1/16/14	2/13/14	382 kWh		\$53.51	
39	Electric billing	2/14/14	3/17/14	406 kWh		\$56.91	
40	Electric billing	3/18/14	4/15/14	347 kWh		\$49.36	
41	Electric billing	4/16/14	5/14/14	314 kWh		\$44.30	
42	Electric billing	5/15/14	6/15/14	440 kWh		\$61.09	
43	Electric billing	6/16/14	7/15/14	563 kWh		\$80.08	
44	Electric billing	7/16/14	8/13/14	512 kWh		\$73.15	
45	Electric billing	8/14/14	9/14/14	512 kWh		\$72.40	
46	Electric billing	9/15/14	10/13/14	367 kWh		\$51.81	
47	Electric billing	10/14/14	11/11/14	360 kWh		\$48.57	
48	Electric billing	11/12/14	12/14/14	477 kWh		\$61.56	
49	Electric billing	12/15/14	1/15/15	511 kWh		\$65.54	
50	Electric billing	1/16/15	2/16/15	447 kWh		\$58.27	
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The data in columns B (START DATE), C (END DATE), D (USAGE) and F (COST) will be used as inputs in Portfolio Manager and can be copied and pasted in to the spreadsheet template provided by Portfolio Manager (see Step 6d in the How To Guide). All of the usage data will be from actual reads.

## **Appendix B – Data Request for Aggregated Whole-Building Energy Report**

If your building has many individual Xcel Energy account numbers and account owners (i.e. tenants have some energy meters they pay to Xcel Energy for either electricity or natural gas), Xcel Energy can provide you with an energy report containing aggregated data for the whole building that can be directly uploaded to Portfolio Manager. If your building has more than 4 tenants, Xcel Energy does not automatically require consent forms from the tenants. If a single tenant makes up more than 50% of the usage in a given month, however, consent will be required from those tenants. *If you have 4 tenants or less, Xcel Energy will require authorization from each customer of record for the Xcel Energy account. You must use the appropriate consent form. See the section below on Xcel Energy Consent Form Authorization.*

To obtain your whole building energy report, you will need to:

1. Send an email to [benchmarking@xcelenergy.com](mailto:benchmarking@xcelenergy.com) and request an aggregated whole-building energy report covering a 3-year period.
2. Include consent forms (if needed), building address, and any additional information to help Xcel Energy determine which meters belong to the building you need captured.

Xcel Energy will contact you if additional consent forms are needed or if there are any additional questions.

Xcel Energy will send the whole-building report via email in .xls format. The data from the spreadsheet should be put into the format necessary for upload into Portfolio Manager. See Step 6 of the Minneapolis Portfolio Manager Guide for specific instructions on entering the utility bill energy usage into Portfolio Manager.

### Xcel Energy Consent Form Authorization

Where required by the process above, the Xcel Energy customer(s) must sign a Consent Form authorizing the release of their data to you (the requesting entity). We must validate the consent form before aggregated whole-building energy report can be released to you. You can use our model consent form attached as Appendix C to obtain the customer's consent. Follow these directions for completing this form:

1. Identify all of the customers within your building who are individually metered and subject to the ordinance (i.e. all non-residential customers)
2. Prepare a template consent form by completing Section 1: "Requestor Information" and print a copy for each tenant.
3. Each tenant must enter their account number, service address and name in the customer section of the consent form, sign and date the form and return it to you.

**Consent form instructions for the entity requesting Customer Energy Usage Data:** The requesting entity must use this form to obtain authorization from any Xcel Energy customer for the release of that Customer's Energy Usage Data to the entity. The requesting entity must populate the form by providing all of the information specified in the instructions and appropriately marking all applicable checkboxes. The entity must provide the completed form for signature to the Xcel Energy customer whose information the entity is seeking to obtain.

**The entity requesting Customer Energy Usage Data must provide the following information on the form prior to providing the form to the customer for signature (refer to the corresponding fields within the form):**

- (1)** Specify requesting entity's details, including the name of the person the customer may contact with questions.
- (2)** Describe the purpose(s) of the proposed use of Customer Energy Usage Data. The description must be detailed and sufficiently clear to inform the customer and Xcel Energy of the purposes for which the data will be used.
- (3)** Identify details about the information you are requesting by populating the type of service, the interval and time period for measuring Customer Energy Usage Data, and any other unique data element not otherwise listed on the consent form.
- (4)** Specify the date or event of consent termination, if the consent period is different from three (3) years.
- (5)** Provide the full service address (including city and state) in order to process a release request.

**If any of this information is not provided, or the form is otherwise incomplete, it will not be accepted by Xcel Energy.**



**(1) REQUESTOR INFORMATION:**

Requesting entity name: \_\_\_\_\_  
Contact person: \_\_\_\_\_  
Physical & mailing address: \_\_\_\_\_  
Phone: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_  
Email: \_\_\_\_\_

**CONSENT TO RELEASE CUSTOMER ENERGY USAGE DATA**

**(2)** We – the entity identified above – have asked you to authorize Xcel Energy to disclose your Customer Energy Usage Data to us so that we may:

- Provide you with products or services you requested
- Determine your eligibility for an energy program
- Other (specify): \_\_\_\_\_
- Offer you products/services that may interest you
- Analyze your data

**(3) INFORMATION WE ARE REQUESTING**

We are requesting access to your Customer Energy Usage Data, which is specific information that Xcel Energy collects from your utility meter (check all service types that apply):

- Electric
- Natural Gas
- Steam

Xcel Energy’s standard report of Customer Energy Usage Data contains monthly usage information. Depending on the type of utility meter installed at your premise, Xcel Energy might be able to provide more granular (daily) Customer Energy Usage Data, and/or information about total energy use in each billing period, average energy use per day, and measured and billed demand.

Interval of Customer Energy Usage Data requested:

- Monthly readings (Xcel Energy’s standard report)
- Daily readings (if available)

Range of historical Customer Energy Usage Data requested:

- one month MM / YYYY
- Most recent 12 months
- Most recent 24 months
- Most recent 36 months
- If desired: ongoing future releases of monthly Customer Energy Usage Data through MM / YYYY

In addition to the Customer Energy Usage Data described above, the report we receive from Xcel Energy will also include your: name; account number; service number; meter number; utility type; service address; premise number; premise description; meter read date(s); number of days in the billing period; utility invoice date; base rate bill amount; other charges including base rate and non-base rate adjustments; taxes; and invoice total amount.

**Exclusion:** Xcel Energy will not provide us with your Social Security Number or any financial account number.

**CUSTOMER’S CONSENT**

Your information is treated as private by Xcel Energy. You are not required to authorize the disclosure of your information, and your decision not to authorize the disclosure will not affect your utility services. Note that Xcel Energy will have no control over the information disclosed pursuant to this consent, and will not be responsible for monitoring or taking any steps to ensure that the information recipient maintains the confidentiality of the information or uses it as authorized by you.

By signing this form you acknowledge and agree that you are the customer of record for this account and that you authorize Xcel Energy to disclose your information as specified in this form. This consent is valid for three years or through **(4)** MM / DD / YYYY, or until you terminate your service or withdraw consent by sending a written request with your name and service address to Xcel Energy at P.O. Box 8 Eau Claire WI 54702 or datarequest@xcelenergy.com. You may terminate this consent at any time.

**CUSTOMER ACCOUNT NUMBER(S)** (attach addendum if multiple numbers) \_\_\_\_\_

**(5) FULL SERVICE ADDRESS** \_\_\_\_\_

**SIGNATURE OF CUSTOMER OF RECORD** \_\_\_\_\_

**PRINTED** \_\_\_\_\_ **DATE SIGNED** MM / DD / YYYY

