# **ENERGY STAR® Portfolio Manager® Setup Guide** for Toronto Hydro's Data Exchange Service



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# 1. Overview

ENERGY STAR® Portfolio Manager® (Portfolio Manager®) is a free tool that helps large building owners track and report electricity usage automatically.

Toronto Hydro offers a data exchange service that enables monthly electricity data to be uploaded directly to your Portfolio Manager® account. Here's how it works:

- 1. Create or log in to your Portfolio Manager® account. (Have your Toronto Hydro account information ready.)
- 2. Submit a connection request to Toronto Hydro.
- 3. Submit a property share request to Toronto Hydro.

**Note:** Toronto Hydro can't aggregate usage data from multiple buildings. If needed, use the campus reporting option in Portfolio Manager®.

**Important:** If your building doesn't meet the eligibility requirements for automated data exchange, you can request manual data aggregation by completing our **Data Request: Reporting Energy Consumption form (PDF, 121 KB).** 

# 2. Setup instructions

This section explains how to enable automated electricity usage data exchange between Toronto Hydro and Portfolio Manager®.

# 2.1 Create a Portfolio Manager® account

If you don't already have an account, visit **Portfolio Manager®** to create one.

# **Add properties**

If you don't already have your properties set up in Portfolio Manager®, click **Add a Property** from the MyPortfolio home page for each building.

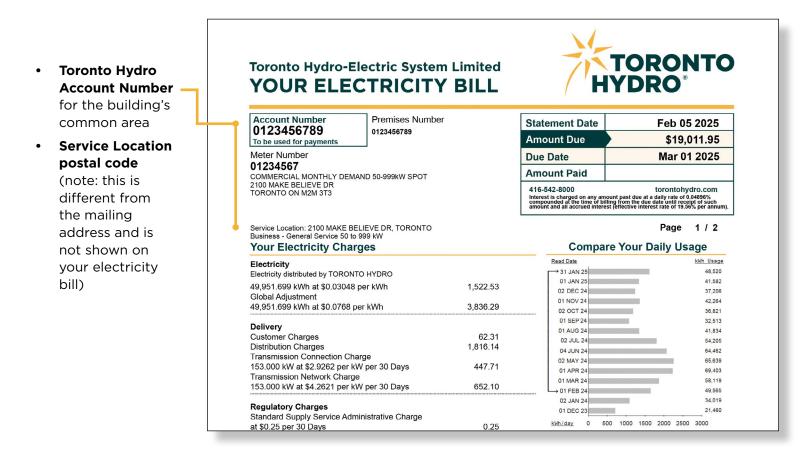
• Fill out the required fields, such as building type, address, year built, gross floor area and occupancy

You don't need to enter an electricity meter number — one will be automatically generated for your account, even if you've already created one manually.

# 2.2 Connect to Toronto Hydro's data exchange service

Once logged in, submit a connection request to Toronto Hydro's data exchange service to begin authentication.

**Important:** The person submitting the request must be authorized by the building owner and have the following building information ready:



Follow these steps to complete your connection request:

#### STEP 1

Log in to your Portfolio Manager® and click Contacts in the top-right corner.



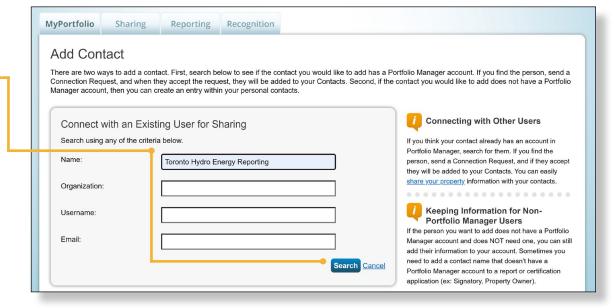
# STEP 2

Select Add New Contacts/Connections.

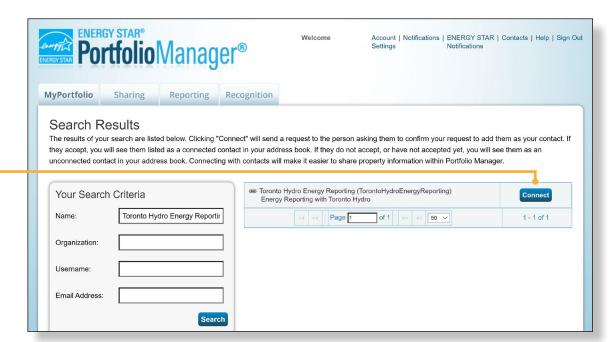


#### STEP 3

In the name field, type
Toronto Hydro EnergyReporting and click
Search.



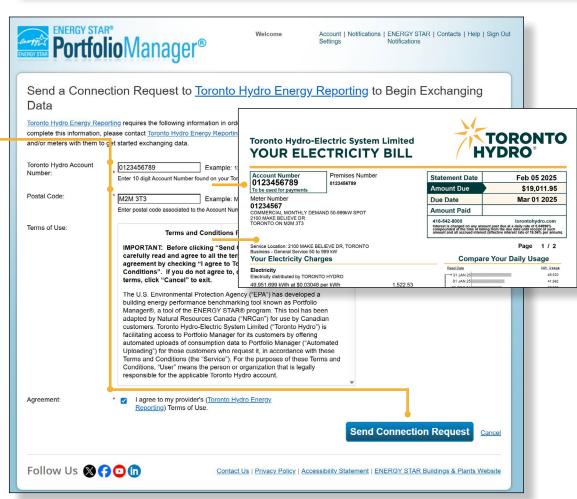
From the search results, locate **Toronto Hydro Energy Reporting** and click **Connect**.

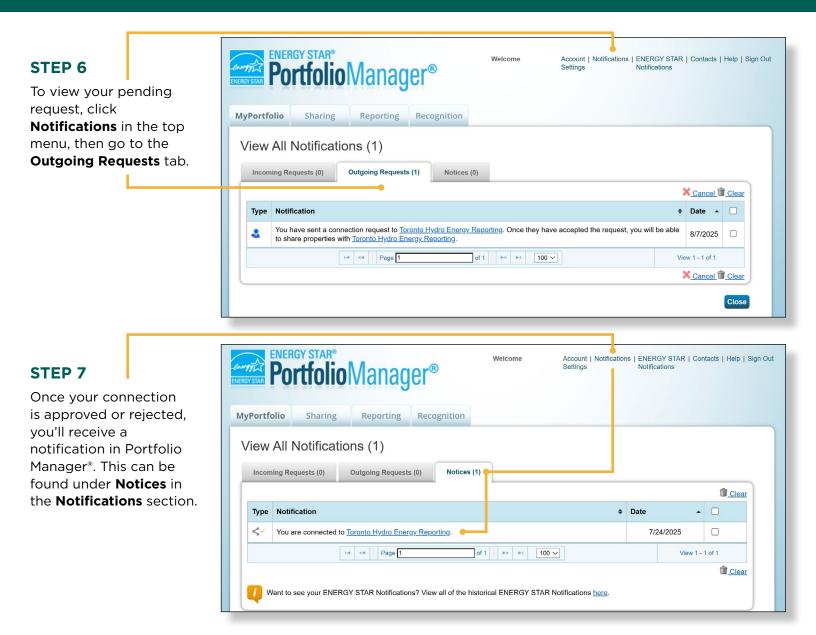


#### STEP 5

On the Send a Connection Request page, enter the following information for each eligible property:

- 10-digit common area account number (including leading zeros)
- Service location postal code (note: this may differ from the service address)





# 2.3 Share your properties with Toronto Hydro

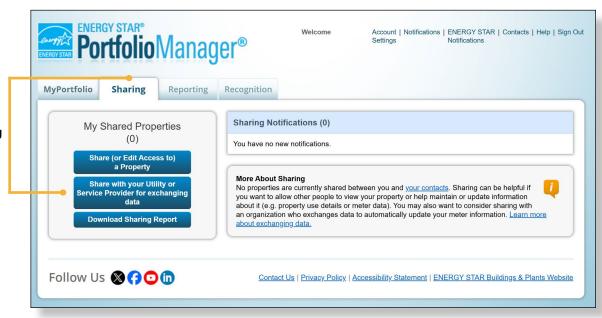
To begin receiving your monthly electricity data through Portfolio Manager®, you'll need to share each property using the built-in sharing feature. This creates a secure connection for ongoing data exchange. Before you begin, please ensure your connection request has been approved.

**Note:** A single connection enables you to share multiple properties — even if they have different account numbers or addresses. You can submit multiple share requests under the same connection.

Follow these steps to share your properties and start receiving data:

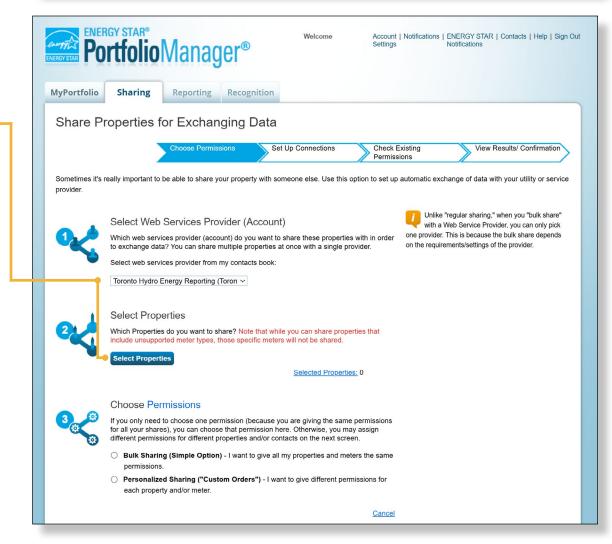
# STEP 1

In Portfolio Manager®, go to the **Sharing** tab and select **Share with** your Utility or Service Provider for exchanging data.

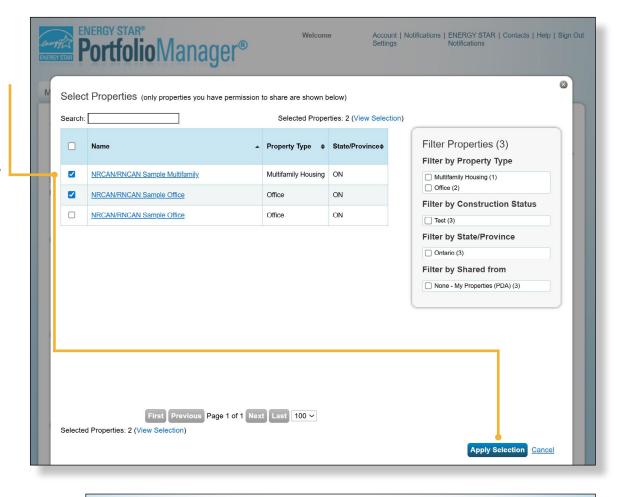


# STEP 2

Under Select Web
Services Provider
(Account), select
Toronto Hydro Energy
Reporting from the
dropdown menu. Then
click Select Properties.



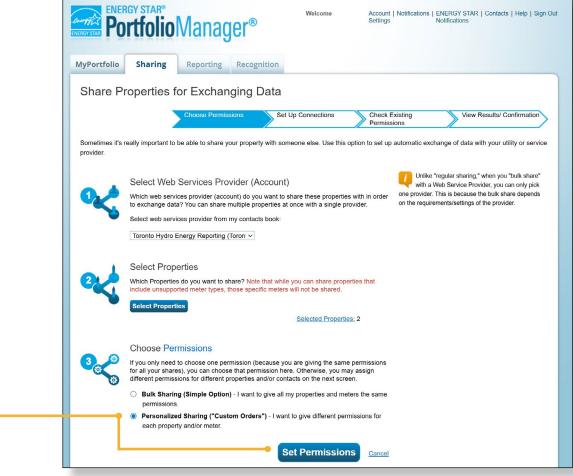
After clicking the **Select Properties** button, a
pop-up window will
appear. Check the box
for each property you'd
like to share. Only select
properties that meet the
eligibility criteria. Then,
click **Apply Selection**.



#### STEP 4

After selecting your properties, click

Personalized Sharing
("Custom Orders") and click Set Permissions.



On the Share Your Property(ies) page, select **Exchange Data** for each property and a pop-up window will appear.

Note: If your Portfolio Manager® account is not the Property Data Administrator, you may be asked to connect Toronto Hydro Energy Reporting to the Property Data Administrator on their behalf before continuing.

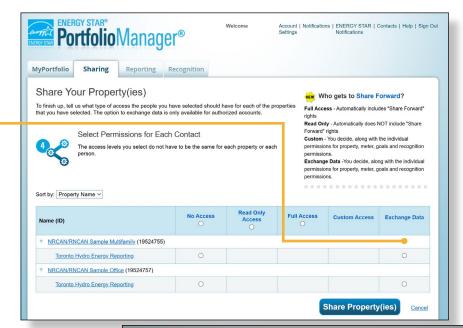
In the pop-up window, enter the following information:

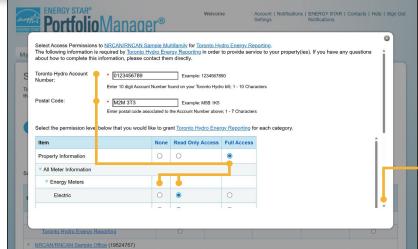
- 10-digit common area account number (including leading zeros)
- Service location postal code (note: this may differ from the billing address)

#### **Permissions**

- For Property Information, select Full Access permission
- For Meter Information, select either None or Read Only Access

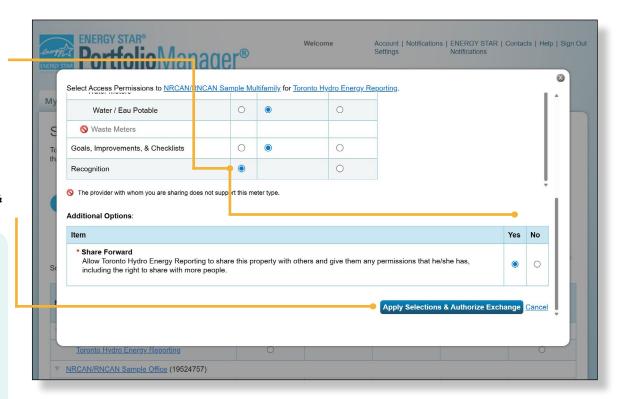
Scroll to the bottom of the page to view more items.





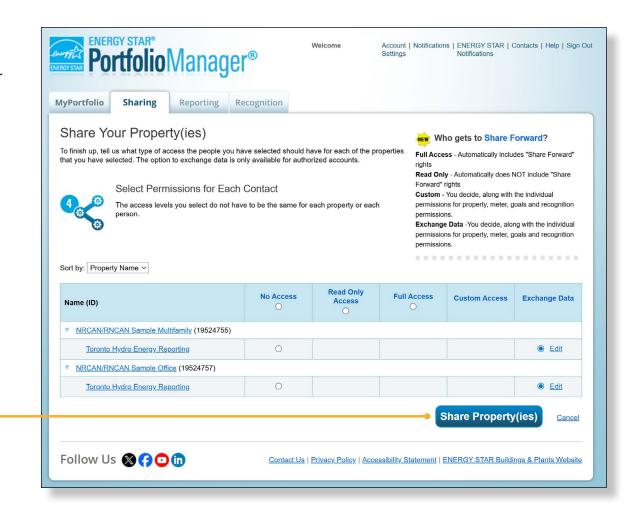
Scroll to the bottom of the page and continue setting permissions for all meters. For the Recognition category, select None. For the Share Forward prompt, select Yes or No. Finally, click Apply Selections & Authorize Exchange.

Note: We encourage you to set up your other meters as well. Sharing additional meter types, such as gas and water, helps us support long-term grid planning and the design of energy-efficiency programs.



# STEP 7

Repeat this process for each eligible property. Once completed, click **Share Property(ies)**.



# **Next steps**

After we receive your property share request, Toronto Hydro will:

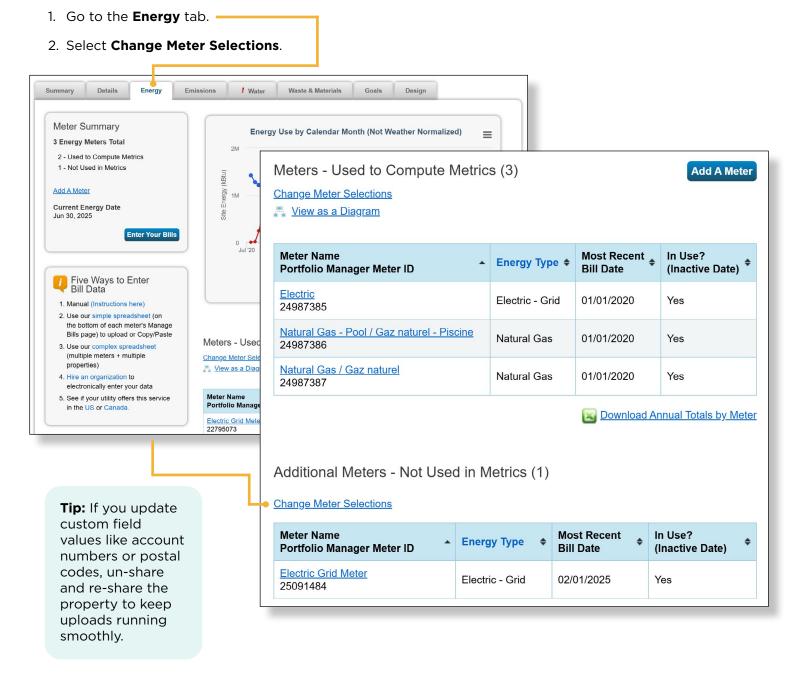
- Email the primary account holder with the request details
- Confirm the share through a notification in Portfolio Manager®
- Add an Electric Grid Meter for your property in Portfolio Manager®

# **Data uploads**

Within one to two weeks, we'll start monthly uploads of up to two years of historical electricity data.

## Review your data

Check for duplicate meter records. New meters aren't automatically included in your building's performance metrics, so update your settings if you'd like to add them.

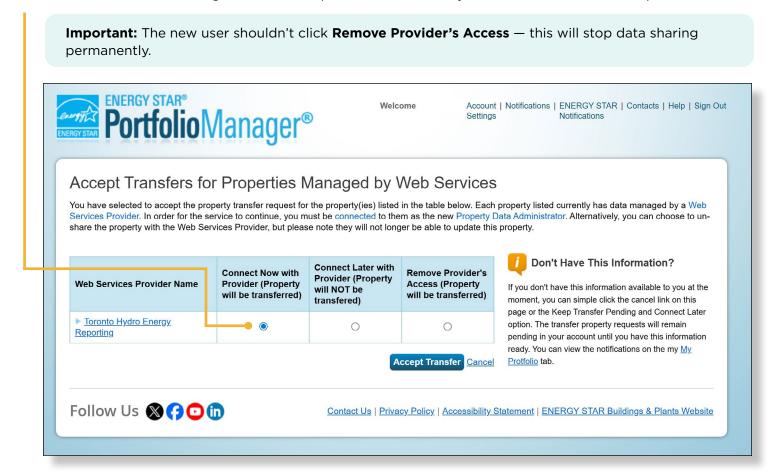


# 3. Additional information

# **Property transfers**

Portfolio Manager® allows you to transfer property ownership to another user — such as a new property manager. The new user must already be connected to Toronto Hydro. If they're not, data exchange will be paused and require additional support to resume.

The new user will receive a transfer notification in Portfolio Manager<sup>®</sup>. They should select **Connect Now with Provider** to maintain data sharing. Please allow up to two business days for the transfer to be completed.



# Meter data information

Toronto Hydro's data exchange service reports electricity usage using adjusted (billed) kWh consumption, which includes both actual consumption and line losses. To calculate the unadjusted (metered) amount, divide the reported value by the Loss Factor Adjustment.

# **Troubleshooting**

If you experience any issues with Toronto Hydro's data exchange service, please email us at **EnergyReporting@torontohydro.com** or call us at **416-542-8000**.

# 4. Frequently asked questions

# **Eligibility**

#### Can any building owner automatically subscribe to Toronto Hydro's data exchange service?

In some cases, building owners may not have a direct relationship with Toronto Hydro — for example, they may not be the holder of any common area account — and can't enroll unless they obtain the account number and service location postal code for the building's common area account. In these situations, they can request manual data aggregation by completing our **Data Request: Reporting Energy Consumption form (PDF, 121 KB)**.

#### Can a building owner with only one account use Toronto Hydro's data exchange service?

Yes, as long as the building is over 50,000 square feet.

#### Why can't buildings smaller than 50,000 square feet participate in Toronto Hydro's data exchange service?

Currently, only buildings over 50,000 square feet are eligible for data exchange. Smaller buildings are expected to be included starting in 2026.

#### Can a tenant's account holder register for Toronto Hydro's data exchange service?

No, only building owners are eligible, unless the tenant owns the sole meter in the building.

# My building has multiple property locations under one account. Is it eligible?

Yes. If those property locations belong to the same property parcel, we aggregate the multiple units even if they have different street addresses.

# Portfolio Manager® overview

#### Is there a cost to use this service?

No, this is a free service for eligible Toronto Hydro building owners.

#### Does this service extend to my other utilities, such as natural gas and district energy?

No, it only applies to electricity accounts served by Toronto Hydro.

# What happens to Toronto Hydro's data exchange service when a building is sold?

When a building is sold, a new Toronto Hydro account is eventually created for the new owner and the existing data exchange service is terminated. More details are available in the **Property transfers** section.

#### Can Toronto Hydro access and update my Portfolio Manager® account?

No, we don't have access to your Portfolio Manager® account and can't make any changes on your behalf. We're responsible for providing a data exchange service — which means uploading your usage data to your Portfolio Manager® account. For help using Portfolio Manager®, please visit the **ENERGY STAR® Portfolio Manager® website** for further assistance.

#### Data uploads

#### How soon after submitting a share request does my data get uploaded to Portfolio Manager®?

Usage data uploads typically begin within one to two weeks after a successful share request.

# How often is new data uploaded to Portfolio Manager®?

Your energy data is updated monthly, but there's a three-month delay to ensure all meter readings are included. For example, if you sign up on September 1, the most recent data available will be from May.

#### How is monthly consumption calculated?

Toronto Hydro prorates meter readings based on the dates they were taken, then calculates the total monthly consumption by combining those values.

## How do I know that all my meters' data has been included?

The total meter count will be emailed to the primary account holder. Meters that track energy you produce — like solar — are counted, but they don't add to your total energy consumption.

## What happens if a tenant account becomes inactive or new tenants move in?

Inactive accounts stop uploading data. New or transferred accounts are automatically included in future aggregations.

#### **Account details**

## When sharing a property, how do I identify the common area account?

Search for an account without a suite number, or terms like "common," "house," "garage," "elevator" or "fire pump" in the account name. Without a clear anchor account, data exchange can't be connected.

## Is it okay if the address in Portfolio Manager® is different from my Toronto Hydro account?

Yes. We use the address on the Toronto Hydro common area account — not the address listed in Portfolio Manager®.

#### What if I entered incorrect account details or need to update them later?

If the account number and service location postal code listed in Portfolio Manager® don't match Toronto Hydro's records, the data upload will fail. To correct this, you'll need to un-share the property and re-share with the correct, up-to-date account details.

# Special metering cases

#### How are meters for renewable energy generation handled?

Meters that track renewable energy generation are included in the total meter count, but excluded from net electricity consumption calculations.

# **5.** Resources and services

# **Province of Ontario EWRB reporting**

The Ontario government requires owners of large buildings to report their energy and water usage through the Energy and Water Reporting and Benchmarking (EWRB) program annually by July 1.

#### Learn more about provincial reporting requirements

#### **City of Toronto EWRB Reporting**

Toronto's Energy and Water Reporting Bylaw requires owners of large buildings in Toronto to report their energy and water use to the City of Toronto annually by July 2.

#### Learn more about municipal reporting requirements

#### **PowerLens Business**

The PowerLens Business portal enables Toronto Hydro customers with interval metering to analyze their energy consumption and manage their account.

#### **Log in or register for PowerLens Business**