



HUDSON VALLEY REGIONAL COUNCIL – NYSERDA CLEAN ENERGY COMMUNITIES PROGRAM LEADERSHIP ROUND

How to Provide Screenshots for the Benchmarking – Advanced Reporting Requirement

The below steps walk through how to access the screenshots required to comply with only the **Share Portfolio Manager Account** submission requirements for the Advanced Reporting Requirement. Examples of the required screenshot is found in 2) b) below.

- 1) Screenshot of the submission requirements for the Benchmarking – Advanced Reporting action.

Choose Your County: Westchester

Choose Your Community: Village of Croton-on-Hudson

Choose Your High Impact Action: **Benchmarking - Advanced Reporting**

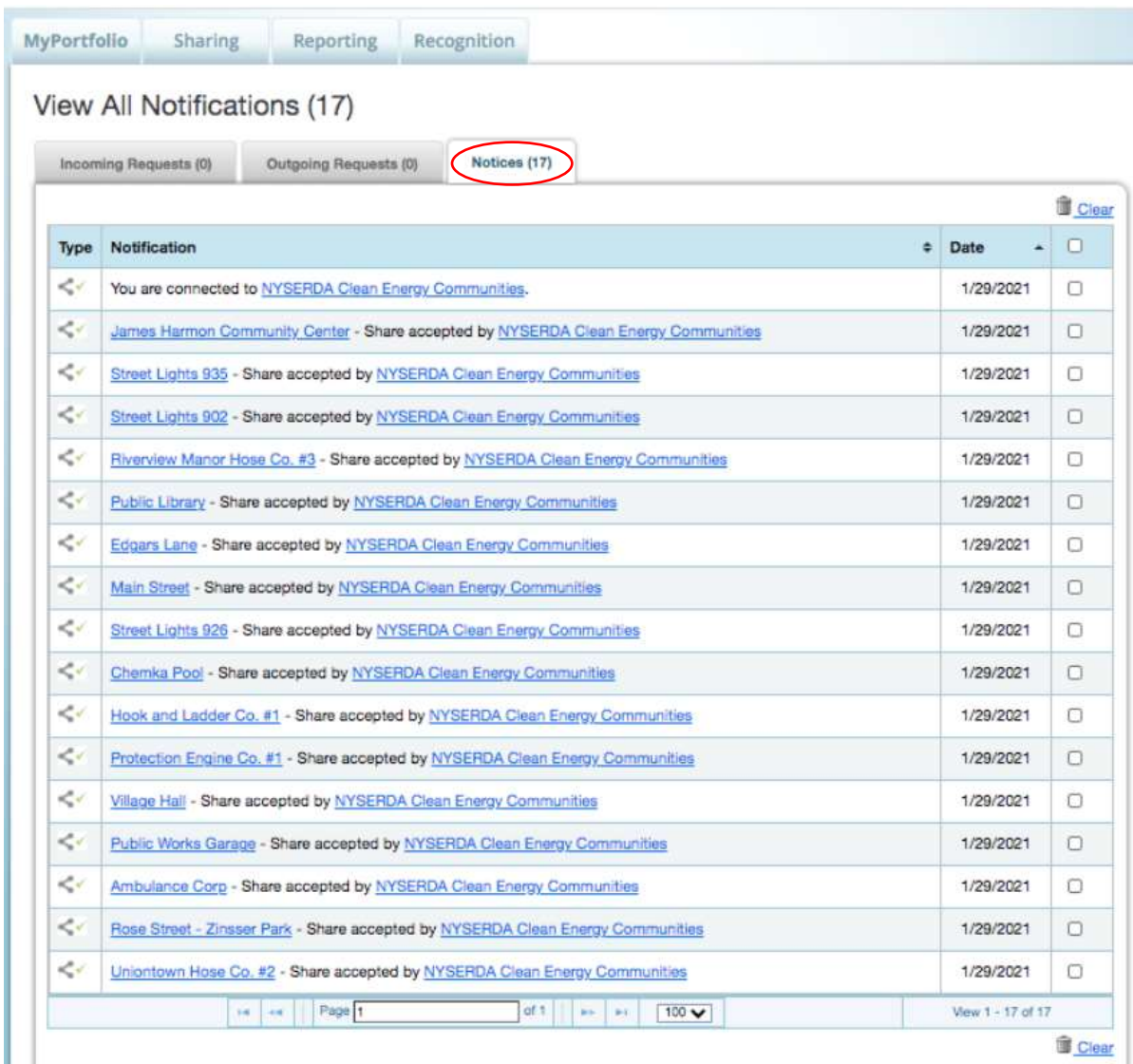
Required Documents		
<p>Upload documentation below. More information on how to meet the requirements for each action and what documentation is required, is provided in the Clean Energy Communities Guidance Document. Toolkits for each high-impact action are available at www.nyserra.ny.gov/cec. The toolkits include step-by-step guidance, template legislation, calculators, and other resources.</p>		
Document Name	Description	Action
Screenshot of Webpage	Submit a screenshot of a webpage on the applying jurisdiction's website where a benchmarking report is posted. Please make sure that the website URL is visible in the screenshot.	<input type="button" value="Browse..."/> No file selected.
Share Portfolio Manager Account	Submit a screenshot on the Sharing Tab of your Portfolio Manager account which shows an accepted share request with NYSDACEC1, or comparable information, stating that NYSDACEC1 has accepted the sharing request. ### While not required, applicants are encouraged to also submit the following Energy Star Portfolio Manager report in the Optional Documents section: 1) In the Sharing tab, scroll down to the Overview of Shared Properties section, 2) Select the By Contact tab, 3) Filter by Contacts I Have Shared With, 4) Select NYSDACEC1 to show list of properties shared to NYSDACEC1, 5) Print as a PDF file, the first 2 or more pages needed to show all properties shared to NYSDACEC1, 6) Submit PDF file in the Optional Documents section below.	<input type="button" value="Browse..."/> No file selected.

2) **Required Submission Documentation:** "Submit a screenshot on the Sharing Tab of your Portfolio Manager account which shows an accepted share request with NYSERDAceca, or comparable information, stating that NYSERDA has accepted the sharing request."

a) Click on Notifications (circled in red).



b) Click on Notices (circled in red). Take screenshot(s) of all properties accepted by NYSERDA. May require multiple screenshots. **This is the screenshot of the required submission documentation.**

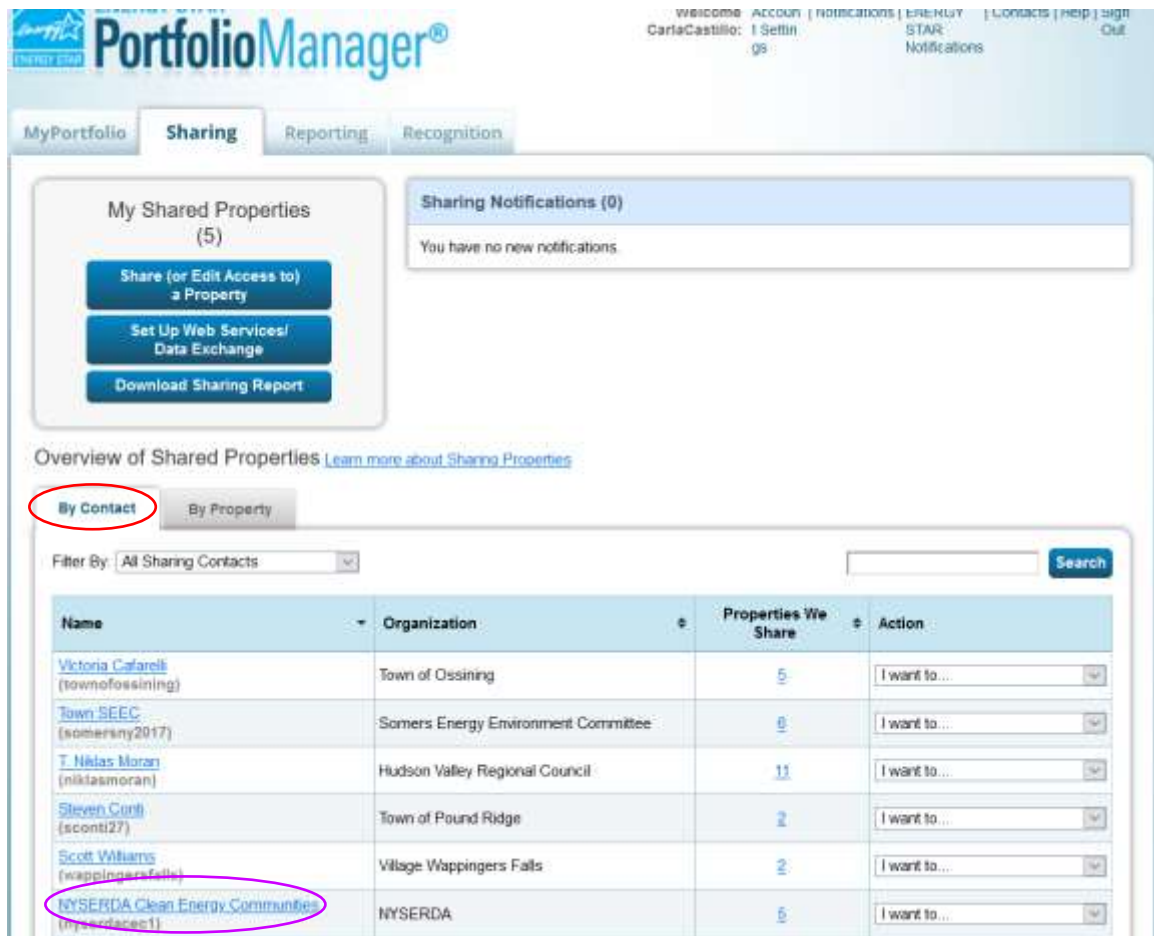


3) **Encouraged Submission Documentation:** List of properties shared with NYSERDAcec1. Below are the steps. The example screenshot appears at the end of this section.

a) Screenshot of the Portfolio Manager landing page. The **Sharing** tab is the second of the four directly beneath the PM logo. Click on Sharing tab (circled in red).



b) Click on the **By Contact** tab (circled in red) that appears beneath the section called Overview of Shared Properties. This will show the listing of properties Croton shared with NYSERDAcec1. Click on the NYSERDAcec1 contact (circled in purple).



- c) Below is a screenshot of the properties listed as being shared with NYSERDA. **This is an example of a screenshot that satisfies the encouraged submission item referenced in 3).**

The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top, there is a navigation bar with 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition' tabs. The main content area is titled 'View Contact: NYSERDA Clean Energy Communities (Not Connected)'. Below this, a message states: 'NYSERDA Clean Energy Communities has an account in Portfolio Manager (username nyserdacc1), but you are not connected. [Send NYSERDA Clean Energy Communities a connection request](#) in order to view personal contact information and share properties directly with him/her.' Below the message, the section is titled 'Properties NYSERDA and I Both have Access to'. There are filters for 'Owned By (PDA): Anyone', 'Shared By: Anyone', and 'In Group: All Properties'. A search button is present. The main table lists properties with columns for Name, Property Data Administrator, My Permissions, NYSERDA's Permissions, and Action.

Name	Property Data Administrator	My Permissions	NYSERDA's Permissions	Action
Dale Cemetery Office/Residence	Victoria Cafarelli	Full Access Shared by Victoria Cafarelli	Read Only Access Shared by Victoria Cafarelli	I want to...
Highway Garage	Victoria Cafarelli	Full Access Shared by Victoria Cafarelli	Read Only Access Shared by Victoria Cafarelli	I want to...
Ossining Boat and Canoe Club	Victoria Cafarelli	Full Access Shared by Victoria Cafarelli	Read Only Access Shared by Victoria Cafarelli	I want to...
Parks Department	Victoria Cafarelli	Full Access Shared by Victoria Cafarelli	Read Only Access Shared by Victoria Cafarelli	I want to...
Ryder Park Caretaker Residence	Victoria Cafarelli	Full Access Shared by Victoria Cafarelli	Read Only Access Shared by Victoria Cafarelli	I want to...

At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and 'View 1 - 5 of 5'.

NOTE: If you are unable to provide the screenshot in 2) b) as sometimes Notifications are accidentally cleared, the sample screenshot shown in 3) b) will also be accepted.