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.

![Screenshot of Submission Requirements](image)

**Required Documents**

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.nysersda.ny.gov/cec. The toolkits include step-by-step guidance, template legislation, calculators, and other resources.

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Description</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>Screenshot of Webpage</td>
<td>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.</td>
<td>Browse... No file selected.</td>
</tr>
<tr>
<td>Share Portfolio Manager Account</td>
<td>Submit a screenshot on the Sharing Tab of your Portfolio Manager account which shows an accepted share request with NYSERDA or comparable information, stating that NYSERDA 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 NYSERDACEC1 to show list of properties shared to NYSERDA, 5) Print as a PDF file, the first 2 or more pages needed to show all properties shared to NYSERDA, 6) Submit PDF file in the Optional Documents section below.</td>
<td>Browse... No file selected.</td>
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</table>
2) **Required Submission Documentation**: “Submit a screenshot on the Sharing Tab of your Portfolio Manager account which shows an accepted share request with NYSERDAceci, 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 NYSERDAec1. 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).

![Sharing tab screenshot](image1)

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 NYSERDAec1. Click on the NYSERDAec1 contact (circled in purple).

![By Contact tab screenshot](image2)
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).**

![Screenshot of properties](image)

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.