HVRC is the regional administrator for the NYSERDA Clean Energy Communities Program (CEC Program). Under the CEC Program, HVRC’s Clean Energy Communities Coordinators (CEC Coordinator) provide technical support to local governments in the Mid-Hudson Region on CEC Program actions related to energy efficiency and clean energy.

The following sections provide step-by-step instructions for connecting your CEC Coordinator with your properties entered into ENERGY STAR Portfolio Manager. Completing this step will enable your CEC Coordinator to provide any necessary technical support associated with Benchmarking of your properties. Begin by logging into your community’s Portfolio Manager account here. Screenshots are provided along with specific instructions; note red circles or arrows items.

CONNECTING WITH YOUR CEC COORDINATOR

- **Step 1:** Select the “Sharing” tab.

- **Step 2:** Click on “Share (or Edit Access to) a Property” button.
• **Step 3:** Scroll down to the “Select People (Accounts)” section on the left side.

![Select People (Accounts)](image)

**Select contacts from my contacts book:**
- Brandi Merolla (brandi)
- Charles Hessler (Village of Ardsley)
- Europa McGovern (emgovern@hudsonvalleyrc.org)
- Gail Jankus (GailJankus179)
- Greg Mumble (GAA)
- Juan Gutierrez (EPA/Region 2)
- michael sweeten (townofwarwick)
- Steven Cottil (scoptil27)
- T. Niklos (tniklos.nickerson)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.

• **Step 4:** Select your CEC Coordinator from the “Select contacts from my contacts book” section. If your CEC Coordinator is not listed, you are not connected with your Coordinator. Proceed to Step 5.

• **Step 5:** From the “Exchanging Data” section pictured on the right side of screenshot in Step 3, click the “connect with” hyperlink.

• **Step 6:** Use any of the search criteria in the “Find Contact in Portfolio Manager” section to locate your CEC Coordinator. Click the “Search” button. A notification will be sent to your CEC Coordinator requesting that they accept your invitation to connect. Informing your CEC Coordination via email is a good practice.
• **Step 7:** Click on the “Notifications” hyperlink to confirm if your CEC Coordinator has accepted your invitation to connect. The CEC Coordinator confirmation will appear in one of the 3 tabs listed under “View All Notifications”.

![Portfolio Manager](image)

GROUPING YOUR PROPERTIES

• **Step 1:** From the MyPortfolio tab, click on the “Add/Edit/Delete Groups” hyperlink.

![Portfolio Manager](image)
• **Step 2:** Click on “Create a Group” button to group your properties for easier sharing with your CEC Coordinator.

![Manage Groups](image)

• **Step 3:** Follow instruction in “Create a Group of Properties” section and select “Create” button. Please select all properties that will appear when you click the “Select Properties” button.

![Create a Group of Properties](image)
**SHARING YOUR PROPERTIES**

- **Step 1:** From the “Sharing” tab, click on “Share (or Edit Access to) a Property” button.

- **Step 2:** Click on dropdown from the “Select Properties” section and select “Properties in a Group”.

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• Step 3: Click the “Select Group” dropdown and select the properties you grouped.

• Step 4:
  o From the “Select People (Accounts)” section, select your CEC Coordinator from the “Select contracts from my contacts book” dropdown.
  o From the “Choose Permissions” section, click “Bulk Sharing ("One-Size-Fits-All")” and “Full Access”.
  o Click on the “Share Property(ies)” button.
• **Step 5:**
  o You will see the below green notification box on successful sharing of your properties as well as a red number next to the “Notifications” hyperlink, which lets you know that all of your grouped properties have been shared.

  ![Step 5 Image](image)

  o The “Outgoing Requests” tab in “View All Notifications” will list all grouped properties shared on an individual basis, including the name of your CEC Coordinator with whom you shared the grouped properties.

  ![Outgoing Requests Tab](image)