

Energy to Care Dashboard User Guide

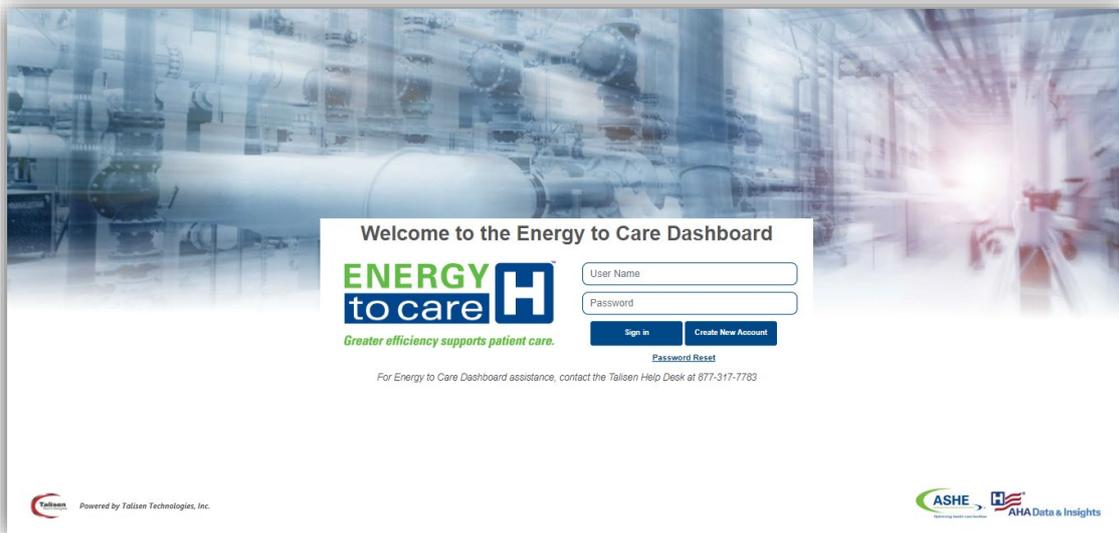


Introduction

The Energy to Care Dashboard Tool offers an at-a-glance view of health care facilities' energy use. It has been designed to be highly visual to reduce user burden as much as possible: with the dashboard, monitoring and observing energy use is as simple as using a fitness tracker to monitor steps.

A successful energy management program optimizes energy performance through benchmarking, establishing reasonable goals, developing action plans, tracking program results and communicating those results with senior management. By using the new tool for only 15 minutes a day, facility teams can identify energy savings that can influence around half of each health care facility's budget and add value by reinvesting savings in patient care.

The purpose of this User Guide is to provide users with comprehensive and detailed instructions for getting started and interfacing with the Energy to Care Dashboard.



Energy to Care Dashboard and portal provided by the American Society for Health Care Engineering (ASHE) of the American Hospital Association (AHA).

Produced by Talisen Technologies, Inc.

*ASHE Enterprise Sustainability Platform (ESP) v5.5 Documentation v.1
Materials may not be reproduced without express written permission.*

- Introduction 1
- Executive Overview 5
 - Benefits 5
- Getting Started..... 7
 - Log In Screen 7
- Dashboard Navigation..... 8
 - Account User Name 8
 - Actions 8
 - Change Password 8
 - Help 9
 - Logout 10
 - Energy to Care Dashboard Navigation Tree..... 11
- New Accounts and Data Access 12
 - Organization Administrator Processes 12
 - New Organization Registration Process..... 12
 - Existing Organization Registration Process..... 17
 - Manage Buildings..... 19
 - Add New Building..... 19
 - Bulk Utility Data Uploads (by Organization Administrators) 22
 - Utility Data Upload Form 23
 - Import and Update Utility Data 24
 - Utility Data Errors..... 26
 - Utility Data Update Check..... 26
 - View Utility Data Updates..... 29
 - Manage Organization Access Requests (by Organization Administrators) 30
- Subscriber Processes..... 31
 - Create New Account 31
 - Building Account Access within User’s Organization..... 34
 - Existing Building Account Access 34
 - New Building Account Access 35
 - Bulk Utility Data Uploads (by Subscribers) 38
 - Utility Data Upload Form 39
 - Import and Update Utility Data 40
 - Utility Data Errors..... 42
 - Utility Data Update Check..... 43

- View Utility Data Updates..... 45
- View Utility Data in Homepage..... 46
- Manage Utility and Property Data..... 46
 - Option One | Energy to Care Managed 46
 - Option Two | ENERGY STAR® Managed/Energy to Care Visible..... 46
 - Option Three | Energy to Care Managed/ ENERGY STAR® Visible 47
- Energy to Care Dashboard Homepage..... 50
 - Dashboard Home Button 51
 - Navigation Tree..... 51
 - Homepage Drop-Down Menus and Links 51
 - Homepage Views 52
 - ENERGY STAR® Score 52
 - Awards Progress..... 52
 - Energy Cost Index (ECI) 54
 - YTD Energy Cost Savings (\$)..... 54
 - Chapter Challenge..... 54
 - Calculation Measures..... 55
 - Calculation Methodology..... 55
 - Energy Use Intensity (EUI) Gauge 56
 - Energy Performance Graphs..... 57
 - Energy Performance | Electricity..... 57
 - Energy Performance | Natural Gas..... 58
 - Total Energy Performance 58
 - Reports..... 60
 - Generating Reports..... 60
 - Report Subscriptions..... 62
- Data Analysis..... 66
 - Utility Portfolio..... 66
 - Bill Analysis..... 67
 - Account Analysis 68
 - Utility Gap Analysis 69
 - Interactive Bar Graphs 70
 - By Rule 70
 - By Location..... 71
 - By Category 71

By Item	71
By Rule Type.....	72
Utility Bill Faults Table.....	72
Help.....	74
Help Menu Options.....	74
Talisen Helpdesk	74

Executive Overview

The 2019 version of the Energy to Care Dashboard offers numerous benefits for Energy to Care participants and their supporters.

Benefits

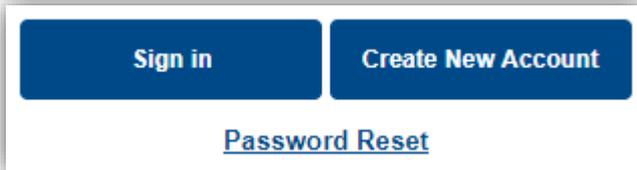
- Clean and simple graphical user interface
- Tailored views specifically created for AHA and ASHE members
 - Energy to Care Award Progress updates for each building account
 - Energy to Care Chapter Challenge ranking updates include all participating chapters
- ENERGY STAR® data options
 - Existing ENERGY STAR® Portfolio Manager account data can be directly imported into the dashboard
 - New Energy to Care account data can be imported from and exported to ENERGY STAR® Portfolio Manager
 - Utility data can continue to be updated monthly as utility bills become available
 - Energy to Care Dashboard automatically synchronizes with ENERGY STAR® Portfolio Manager monthly utility data
 - ENERGY STAR® Portfolio Manager account logins are no longer required to use the Energy to Care Dashboard
 - The ENERGY STAR® Score widget provides users with convenient score monitoring with or without an ENERGY STAR® Portfolio Manager account
 - The Energy to Care Dashboard uses utility and facility data upload templates (CSV file templates)
- Energy consumption and cost data widgets
 - Provides monthly measurement and verification monitoring with the Energy Performance widgets using electricity and natural gas utility bill consumption and cost data
 - Monitors Energy Cost Index (ECI)
 - Sums the cumulative year-to-date energy cost saving
 - Monitors Energy Use Intensity (EUI)
 - Weather data (Heating Degree Days and Cooling Degree Days) overlays
- Utility portfolio
 - Displays energy cost trends with a monthly bill analysis graph.
 - Individual utility type views (e.g., water, natural gas and electricity)
 - Total energy cost view
 - Weather data (Heating Degree Days and Cooling Degree Days) overlays
 - Displays energy cost trends with a monthly account analysis graph
 - Individual utility type views (e.g., water, natural gas and electricity)

- Weather data (Heating Degree Days and Cooling Degree Days) overlays
- Utility gap analysis
 - Identifies missing utility bills and billing days (i.e., utility gaps) within the uploaded utility bill dataset
 - Identifies duplicate utility bills and overlapping billing days (i.e., utility laps) within the uploaded utility bill dataset
 - Verifies all relevant data is uploaded and available for the Awards Progress, Chapter Challenge and Energy Performance widgets
 - The Utility Gap Analysis is available at no cost to all users until July 15, 2020
 - Use of the Utility Gap Analysis features will require ASHE and/or AHA membership after July 15, 2020

Getting Started

A current version web browser must be used to log into and interface with the Energy to Care Dashboard. Chrome is the preferred web browser for optimum dashboard performance, but FireFox, Internet Explorer and Edge are acceptable alternatives.

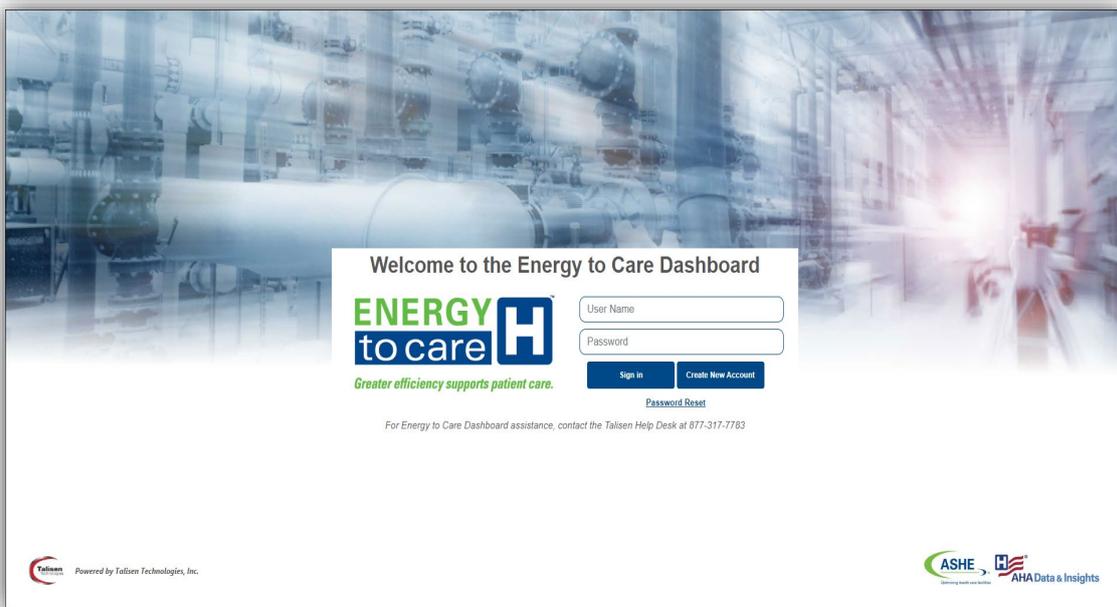
To maximize the dashboard view, press the F11 keyboard key. Most web browsers switch to and from full screen mode via the F11 key.



Log In Screen

Each user is required to log into the Energy to Care Dashboard using a unique user name and password.

From the Log In screen, users are encountered with three options: Log In, Create New Account and Password Reset.

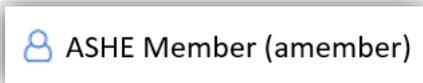


Dashboard Navigation

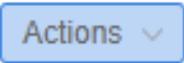
Upon entering the Energy to Care Dashboard homepage, several features are available to assist the user with navigating through and interfacing with the dashboard.

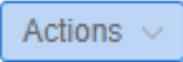
Account User Name

Account user names are identified in the top left-hand corner of the Energy to Care Dashboard homepage.

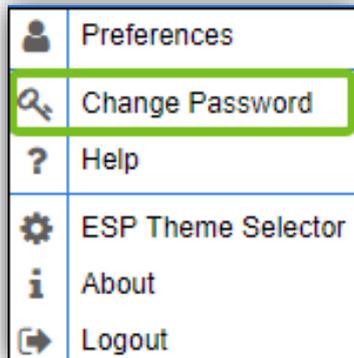


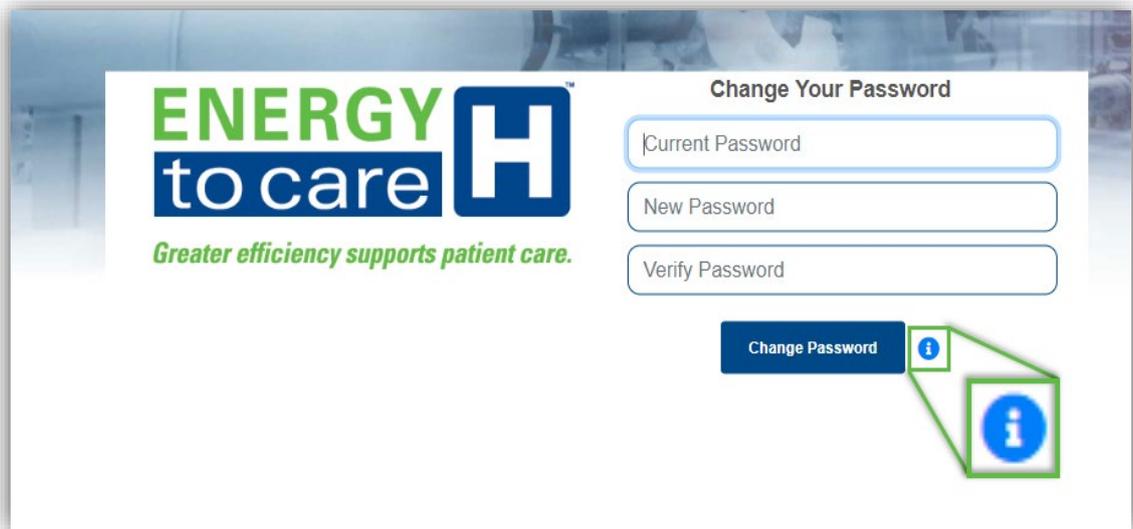
Actions

In the upper right-hand corner, locate the  drop-down menu button.

The  menu items include:

Change Password: This feature allows users to change the account password. Passwords must be **8 to 20 characters** in length with at least five unique characters and no more than two consecutive identical characters.





Tip: Click on the  icon located next to the **Change Password** button to receive additional guidance for this procedure.

Password Policy

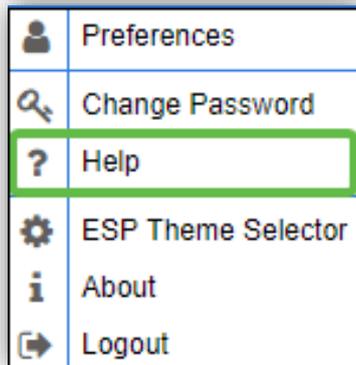
Passwords must be between 8 and 20 characters in length with at least 5 unique characters, and no more than 2 consecutive identical characters.

Passwords must contain at least 1 upper case letter (A-Z), 1 lower case letter (a-z), and 1 numeric digit (0-9). Other special keyboard characters are not required, but may be used, including:

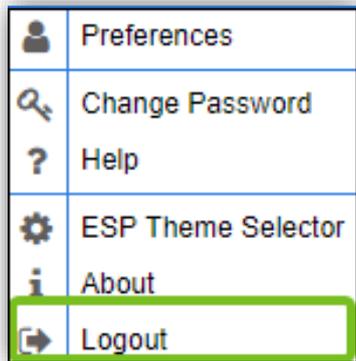
^ ~ ! @ # \$ ^ * () _ - = { } | [] : " ; ' < > ? , . /

Do not choose passwords that contain easily-guessed personal information such as your user name, personal name, name of a family member or pet, name of a favorite hobby, etc.

Help: The Help menu option is a quick access link to the full Energy to Care Dashboard User Guide. Clicking this link will open the User Guide in a new web browser window.

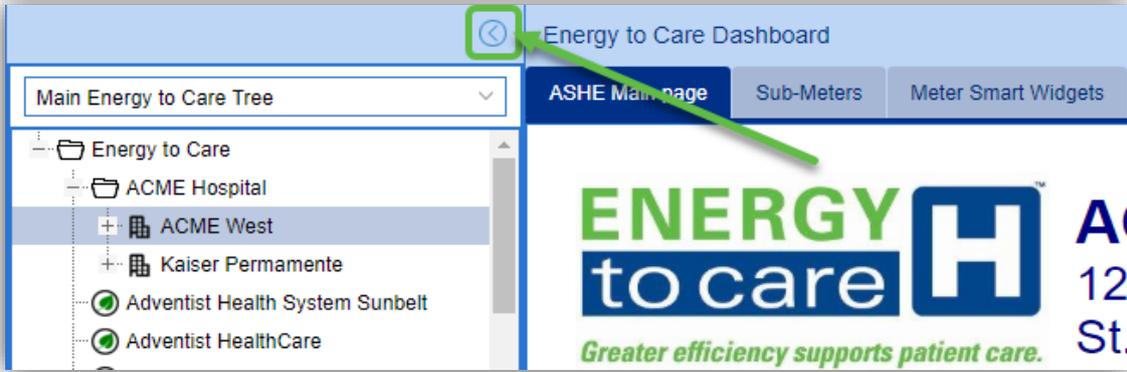


Logout: The Logout menu option allows users to properly log out of the Energy to Care Dashboard and removes the user’s credentials from the local web browser. Upon selecting this option, the user will reroute to a log out confirmation page. Click on the “OK” button to return to the Log In screen, indicating the user is no longer logged into the dashboard.



Energy to Care Dashboard Navigation Tree

Click the arrow located above the navigation tree to maximize the amount of space available on the homepage. The navigation tree will collapse.



Click on the arrow again to expand the navigation tree.



New Accounts and Data Access

The new dashboard provides four possible roles for each Energy to Care user account:

- **Existing Organization Administrator:** This role is the same as the existing ENERGY STAR® Property Administrator.
- **New Organization Administrator:** This user is representing a health care organization new to the Energy to Care Dashboard (i.e., not already established in the Energy to Care Dashboard). Users should select this option if their data is not shared with ASHE via ENERGY STAR® Portfolio Manager.
- **New Subscriber:** This role is defined as a new user who is requesting access to a building or buildings already established in the Energy to Care Dashboard.
- **Existing Subscriber:** This role is an existing user requesting access to a building or buildings already established in the Energy to Care Dashboard.

The organization administrator will manage the account for all buildings associated with the organization, which could represent a standalone health care facility or a health care system. Additionally, this individual will allow for subscriber rights to other users, including other organization members and any partner companies that might need access.

If an organization is not sharing data via ENERGY STAR® Portfolio Manager, then its users will follow one of the organization administrator processes outlined below.

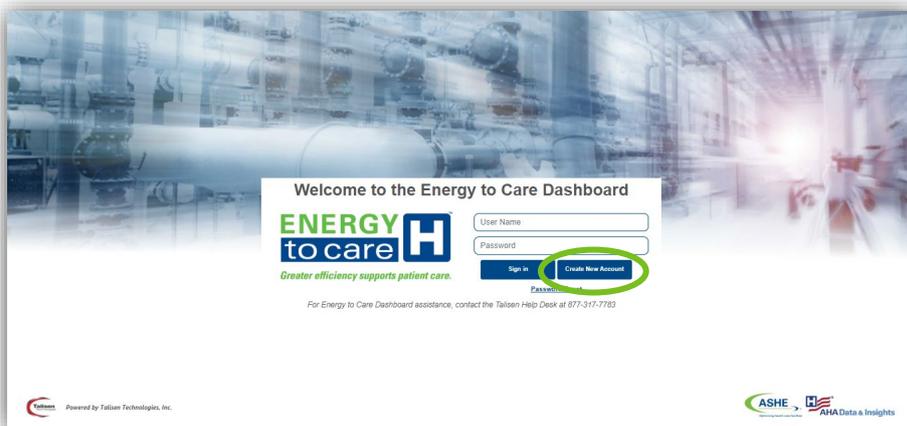
All other users will follow one of the subscriber/user processes outlined later in this user guide.

Organization Administrator Processes

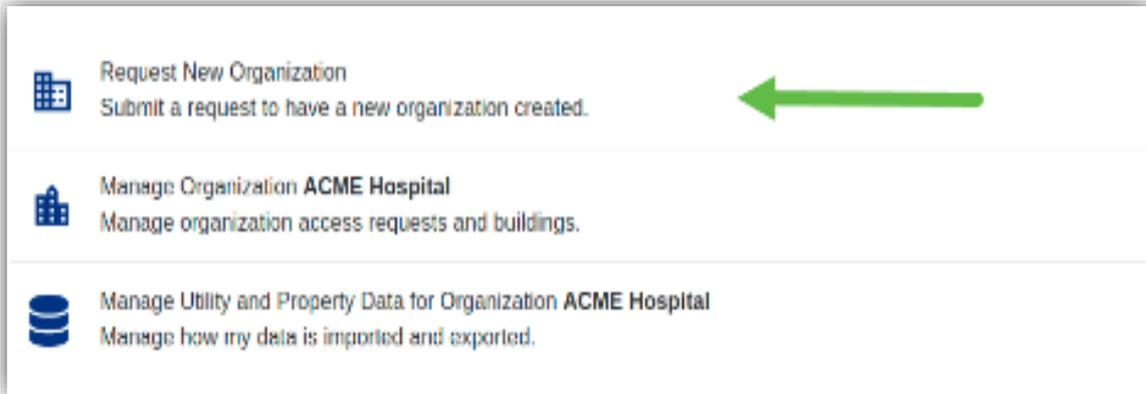
The organization administrator uses the following processes to request access to existing and new health care facilities in the Energy to Care Dashboard, upload utility bill data, and approve access for new users.

New Organization Registration Process

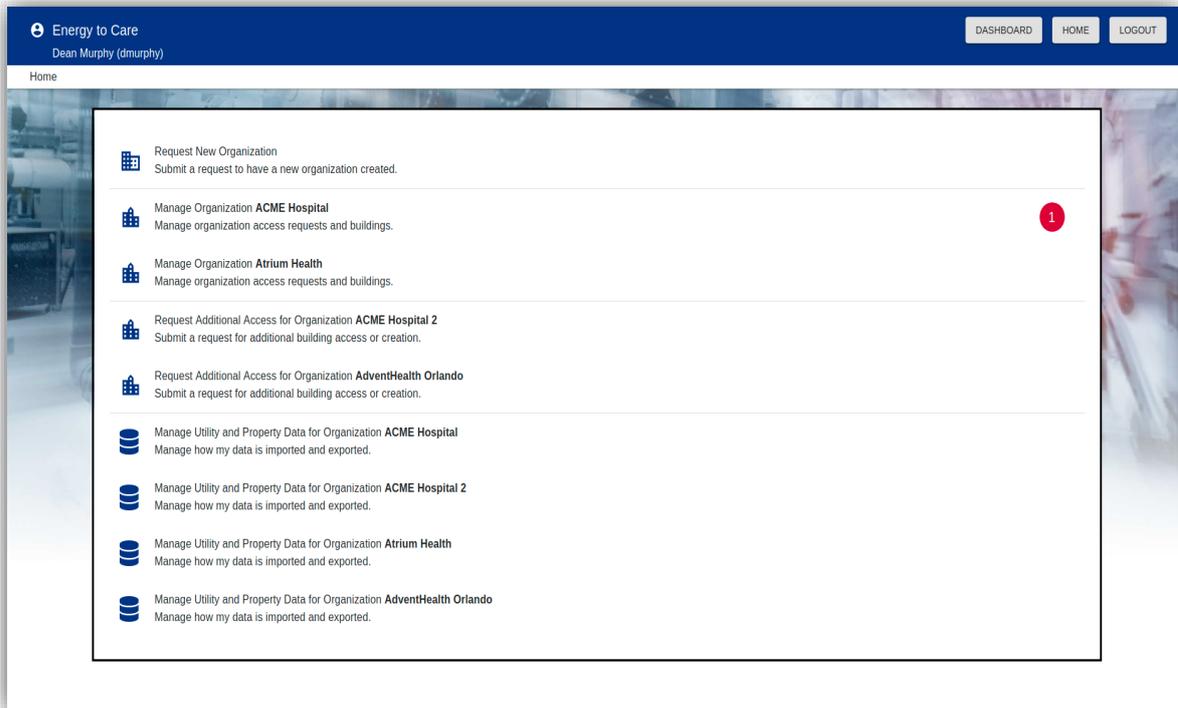
To register as a new organization administrator, click on the  button located on the Energy to Care Dashboard Log In screen.



Next, click on the “Request New Organization” option to begin the registration process.



If a user has access to multiple organizations within the Energy to Care Dashboard, then s/he will see multiple Manage Organization links. The organization administrator has the ability to manage utility and property data for each organization to which s/he has access.



Click on the “Manage Organization” option to open the form displayed below.

Complete the Personal Account Information and then click the **NEXT** button. Required fields are identified with a red asterisk (*).

1 Personal Account Information — 2 Organization Information — 3 Submit Request

* First Name

* Last Name

* Company Name

* Company Unit Name

* Street Address

Street Address 2

* City

* Region/State ▾

* Zip / Postal code

* Country ▾

* Telephone Number

* Email

Complete the Organization Information and then click the **NEXT** button. Required fields are identified with a red asterisk (*).

Progress indicator: 1 Personal Account Information (checked), 2 Organization Information (current), 3 Submit Request

* Organization Name

* Organization Description

* Street Address

Street Address 2

* City * Region/State ▾

* Zip / Postal code * Country ▾

Review and confirm all entered information and then click on the **SUBMIT** button.

✓ Personal Account Information — Organization Information — 3 Submit Request

Please Review the following information and once confirmed, press submit to complete your request.

User Account Details	Organization Details
First Name: Cate	Organization Name: Talisen Technologies
Last Name: Touchette	Description: Talisen Technologies
Company Name: Talisen Technologies	Address: 12655 Olive Blvd
Company Unit Name: Talisen Technologies	Address 2:
Address: 7209 Cambridge Ave	City: St. Louis
Address 2: Suite 500	Region: MO
City: University City	Postal Code: 63141
Region: AL	Country: United States
Postal Code: 63130	
Country: United States	
Telephone: 3143681647	
Email: cbenda@talisentech.com	

I'm not a robot  reCAPTCHA
Privacy - Terms

f

Existing Organization Registration Process

If the organization already exists in the Energy to Care Dashboard, click on the



Once redirected to the screen below, select the “Request Alternate Admin” option.

When “Request Alternate Admin” is selected, an email is sent to the organization administrator for approval.

If the organization does not already exist in the Energy to Care Dashboard, then a message is returned to the user stating the request has been emailed to the ASHE helpdesk for approval. Additionally, a notification email is sent to the user, stating the request has been sent to ASHE for approval.

Once ASHE approves the user’s request, the account is created and the user is notified by email with a link to the Energy to Care Dashboard.

After receipt of this email and link, log into the dashboard with the supplied user name and temporary password. Upon the first login, the change password screen appears.

Enter the supplied temporary password once and a new password twice.

Next, click on the



Tip: Click on the  icon located next to the  button to receive additional guidance for this procedure.

A confirmation message appears when the password is changed successfully.

Click “OK” and then log into the Energy to Care Dashboard with the newly created password.

From the Energy to Care Dashboard homepage, the requested organization will appear in the Energy to Care Dashboard navigation tree on the left-hand side of the screen as shown.

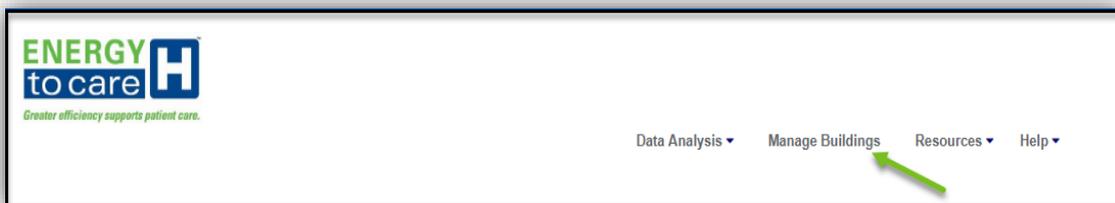


Manage Buildings

Several features are available via the Manage Buildings link: Request New Organization, Manage Organization, and Manage Utility and Property Data. The Manage Organization feature allows users to manage organization access requests and buildings. The Manage Utility and Property Data for Organization option allows user to manage how data is imported and exported into/out of the Energy to Care Dashboard.

Add New Building

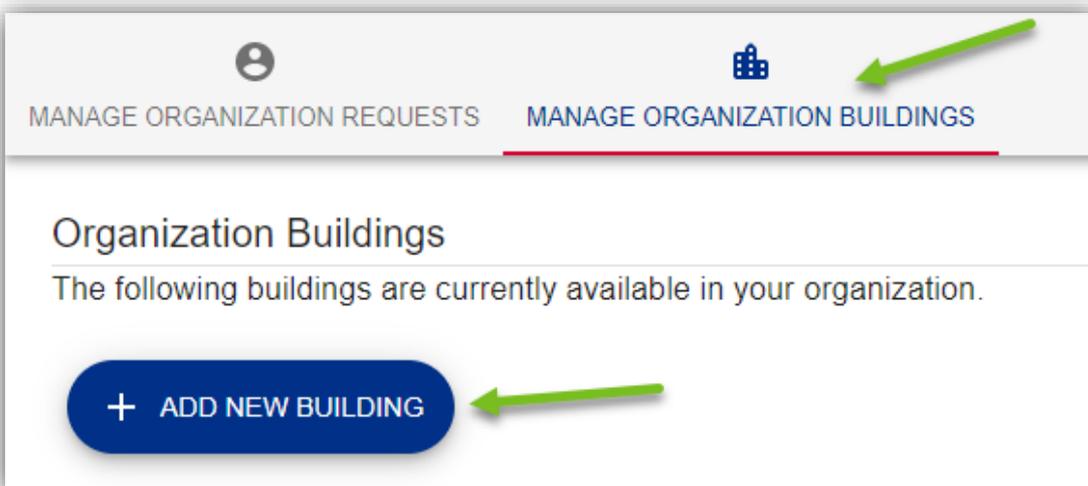
Start at the Energy to Care Dashboard homepage. Select “Manage Buildings” from the drop-down menu options to add a building to the user account.



Select “Manage Organization” to add buildings and approve pending requests.



Click on “MANAGE ORGANIZATION BUILDINGS”. Then, click on 



After the Add New Building form loads, enter the new building information into the form. Required fields are identified with a red asterisk (*).

Add New Building X

Please provide the following information for the building you would like to be created.

* Building Name

* Building Address 1

Building Address 2

* City

* Region/State x | v

* Zip / Postal code

* Country x | v

United States

* Area Gross Sq/Ft

Location Type

Hospital (General Medical & Surgical) v

* Time Zone v

America/Chicago

Facility Age (years)

Labor Cost sq. ft

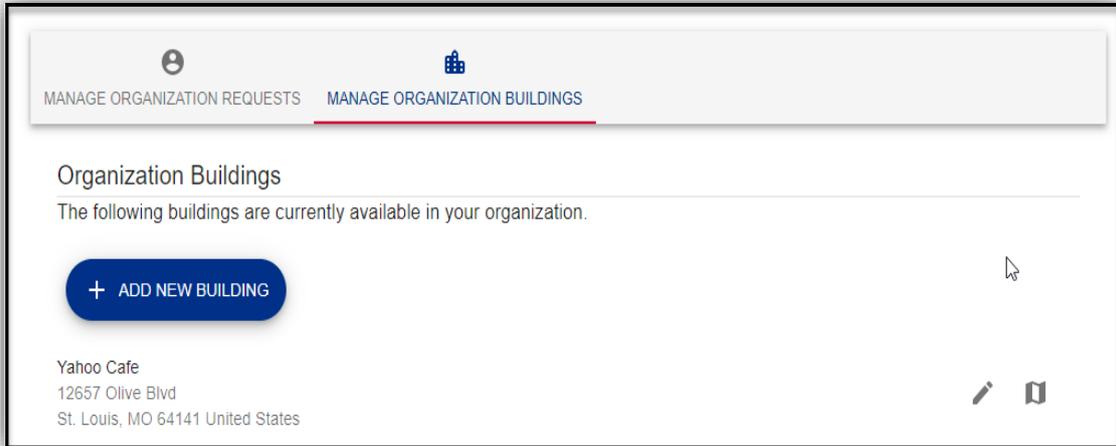
CLEAR
SUBMIT

Click the SUBMIT button after the form is complete. See details below for further description of fields.

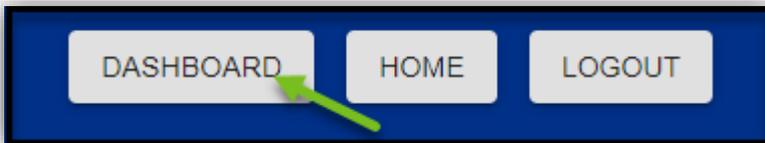
Tip: These definitions appear when the user hovers over the term/metric in the form.

- **Area Gross Sq/Ft:** Gross Floor Area should include all space within the building(s), including classrooms, administrative space, conference rooms, kitchens used by staff, lobbies, cafeterias, auditoriums, stairways, atriums, elevator shafts, and storage areas.
- **Facility Age (years):** Age should be identified as the appropriate range for the majority of the gross floor area and is typically equal to the number of years since original construction.
- **Labor Cost per Sq/Ft:** Unit Labor Cost equals the total annual labor expense per 1 gross square foot maintained.

Once a new building is added, it is listed with other buildings under Organization Buildings within the MANAGE ORGANIZATION BUILDINGS tab. At this point, users can add more buildings or edit existing buildings.



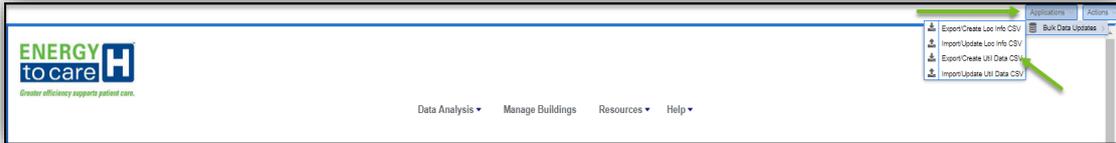
Click on the **DASHBOARD** button to return to the Energy to Care Dashboard and view all user account buildings in the Energy to Care Dashboard navigation tree.



Bulk Utility Data Uploads (by Organization Administrators)

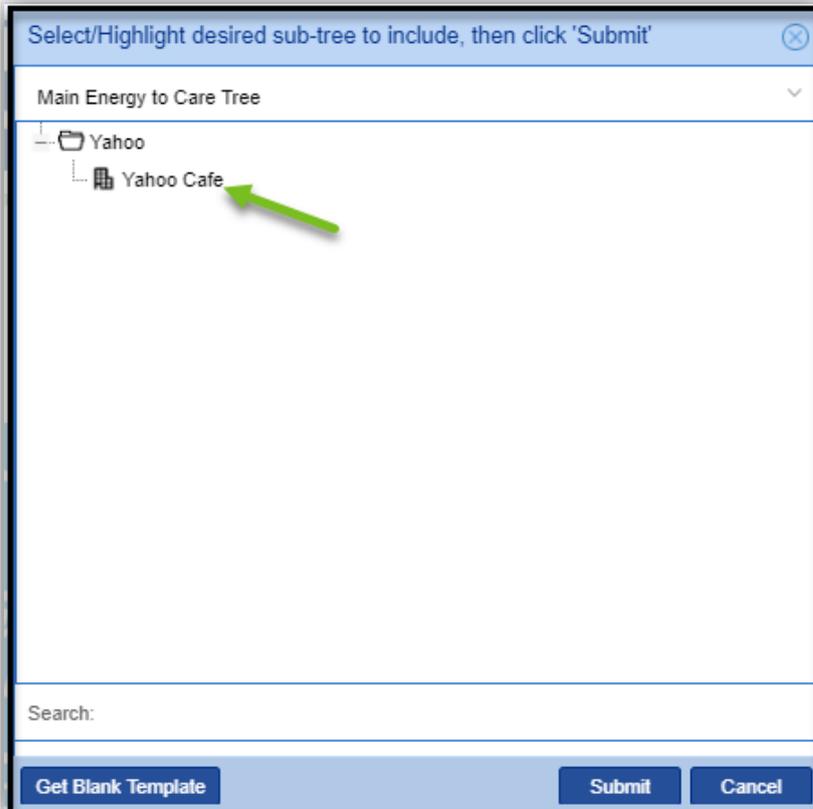
The Bulk Data Updates feature allows users to upload new service period utility data and update existing service period utility data for existing accounts through a CSV template file.

From the Energy to Care Dashboard homepage, select the Applications drop-down menu in the top right-hand corner of the screen. Hover over “Bulk Data Updates” and select “Export/Create Util Data CSV”.



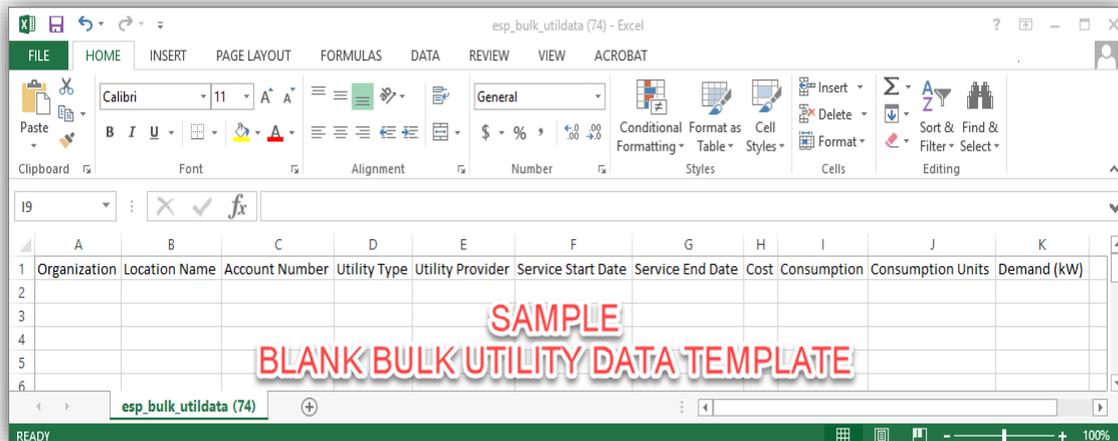
Select the appropriate building from the navigation tree to upload utility data. If existing utility data is available (i.e., data sets for existing buildings in the Energy to Care Dashboard), users can download that data to view it formatted in the template CSV file. Existing data can be updated and reimported into the Energy to Care Dashboard.

If no data exists in the Energy to Care Dashboard for the selected building, then click on the Get Blank Template button to download a blank CSV file template, which should be used for the initial bulk utility data upload.



Utility Data Upload Form

The template CSV file exports to the Downloads folder on the user's personal computer. A sample (blank) Bulk Utility Data template is provided below.



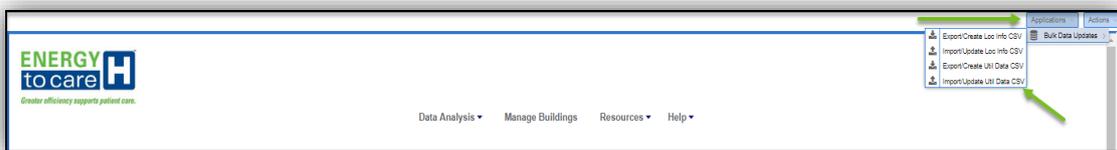
When completing the CSV file (i.e., spreadsheet), the following fields must be filled with accurate data:

- **Organization:** Enter the name of the organization, which should be listed at the top of the Energy to Care Dashboard navigation tree. For example, ACME Hospital is the health care system to which ACME West belongs; therefore, ACME Hospital is listed as the organization. The organization entered in the file must match the organization name exactly as displayed in the Energy to Care Dashboard navigation tree.
- **Location Name:** Enter the name of the hospital building listed under the organization. For example, ACME Hospital is the health care system to which ACME West belongs; therefore, ACME West is listed as the location name. The location name entered in the file must match the location name exactly as displayed in the Energy to Care Dashboard navigation tree.
- **Account Number:** The account number is assigned to the building by the utility provider and can be found on monthly utility bills.
- **Utility Type:** Identify the utility type as electric, gas or water.
- **Utility Provider:** The utility provider is the company or organization providing the utility to that building. The utility provider entered in the file must match the utility provider name exactly as displayed on the monthly utility bills. Verify the name for word and spelling accuracy.
- **Service Start Date:** The service start date (i.e., the first day of the service period) can be found on the monthly utility bill. Enter the date using the format m/d/yyyy.
- **Service End Date:** The service end date (i.e., the last day of the service period) can be found on the monthly utility bill. Enter the date using the format m/d/yyyy.
- **Cost:** Enter the service period utility cost provided on the monthly utility bill using the format xxx.xx. Do not include dollar signs.

- **Consumption:** Enter the service period utility consumption (i.e., use or usage) provided on the monthly utility bill using the format xxxx.xx.
- **Consumption Units:** Enter the utility consumption units (e.g., kWh, MMBtu, therms, ccf) provided on the monthly utility bill. Units are case sensitive.
- **Demand (kw):** Enter the demand (kilowatts) provided on the monthly utility bill using the format xxxx.xx.

Import and Update Utility Data

Ensure all utility data is completely and accurately entered in the CSV file. Then, upload the file using the Energy to Care Dashboard homepage by clicking on the Applications drop-down menu in the top right-hand corner of the screen. Hover over “Bulk Data Updates” and select “Import/Update Util Data CSV”.



When the CSV Utility Data File Import form opens, click on the Select File button to choose a file to import (i.e., the completed CSV file).

Once the file is selected, click on the Upload File button to upload data saved to the CSV file into the Energy to Care Dashboard.

CSV Utility Data File Import

CSV File to Import: **Select File**

CSV Upload/Update Status

Status/Action: Click "Select File" above to select a CSV file, then select the "Upload File" button below.

Uploaded File:

Data Type: Location Measures

Import Date/Time:

Line #	Status/Error Messages

Upload File **Cancel/Exit**

A validation screen displays after the selected file is successfully uploaded. Click on the Validate File Content button to validate the data.

CSV Utility Data File Import

CSV Upload/Update Status

Status/Action: File upload successful, select "Validate File Content" to continue.

Uploaded File: esp_bulk_utildata (76) GC.csv

Data Type: Location Measures

Import Date/Time: July 2, 2019 - 3:15:53 CDT (GMT-05:00)

Line #	Status/Error Messages
	File uploaded, not yet validated.

Cancel Update/Load New File Validate File Content Cancel/Exit

Utility Data Errors

If errors exist within the entered data, then the validation function provides feedback to the user regarding these errors. Errors are listed in the CSV Utility Date File Import form as line items identified with red text. Each error is listed with a line number and error message.

Click on the Cancel/Exit button.

Open the selected CSV file. Using the feedback provided in the error messages, revise the data in the CSV file accordingly. Save all file revisions before attempting to upload it again.

The screenshot shows a web application window titled "CSV Utility Data File Import". At the top, there is a text input field for "CSV File to Import:" with a "Select File" button to its right. Below this is a section titled "CSV Upload/Update Status" containing several fields: "Status/Action:" with the message "Errors exist in file as noted below. Please fix them then try again...UPDATE ABORTED.", "Uploaded File:" with "esp_bulk_utilidata (1).csv", "Data Type:" with "Location Measures", and "Import Date/Time:" which is empty. Below the status section is a table with two columns: "Line #" and "Status/Error Messages". The table contains two rows of error messages:

Line #	Status/Error Messages
2	Consumption Units is invalid ("kwh"). Must be one of: [MMBtu, kWh].
3	Could not find sepecified location in system by Location Name...new accounts MUST have valid location assigned.

At the bottom right of the window, there are two buttons: "Upload File" and "Cancel/Exit". A green arrow points to the "Cancel/Exit" button.

Utility Data Update Check

When the utility data successfully validates, the upload/update process continues to the next stage. A "File verification complete...no issues found" message appears in the CSV Utility Date File Import form window.

Click on the Run Update Check button. The Update Check function performs a pre-check on all utility data changes.

CSV Utility Data File Import

CSV Upload/Update Status

Status/Action: Format/Data verification passed. Select "Run Update Check" to continue.

Uploaded File: esp_bulk_utildata (1).csv

Data Type: Location Measures

Import Date/Time: September 4, 2019 - 10:27:14 CDT (GMT-05:00)

Line #	Status/Error Messages
	File verification complete...no issues found.

Cancel Update/Load New File Run Update Check Cancel/Exit



Click on the “Apply Updates” button.

CSV Utility Data File Import

CSV Upload/Update Status

Status/Action: Updates noted about to be made. If OK, select "Apply Updates" to run...LAST CHANCE to cancel updates

Uploaded File: esp_bulk_utildata (1).csv

Data Type: Location Measures

Import Date/Time: September 4, 2019 - 10:27:14 CDT (GMT-05:00)

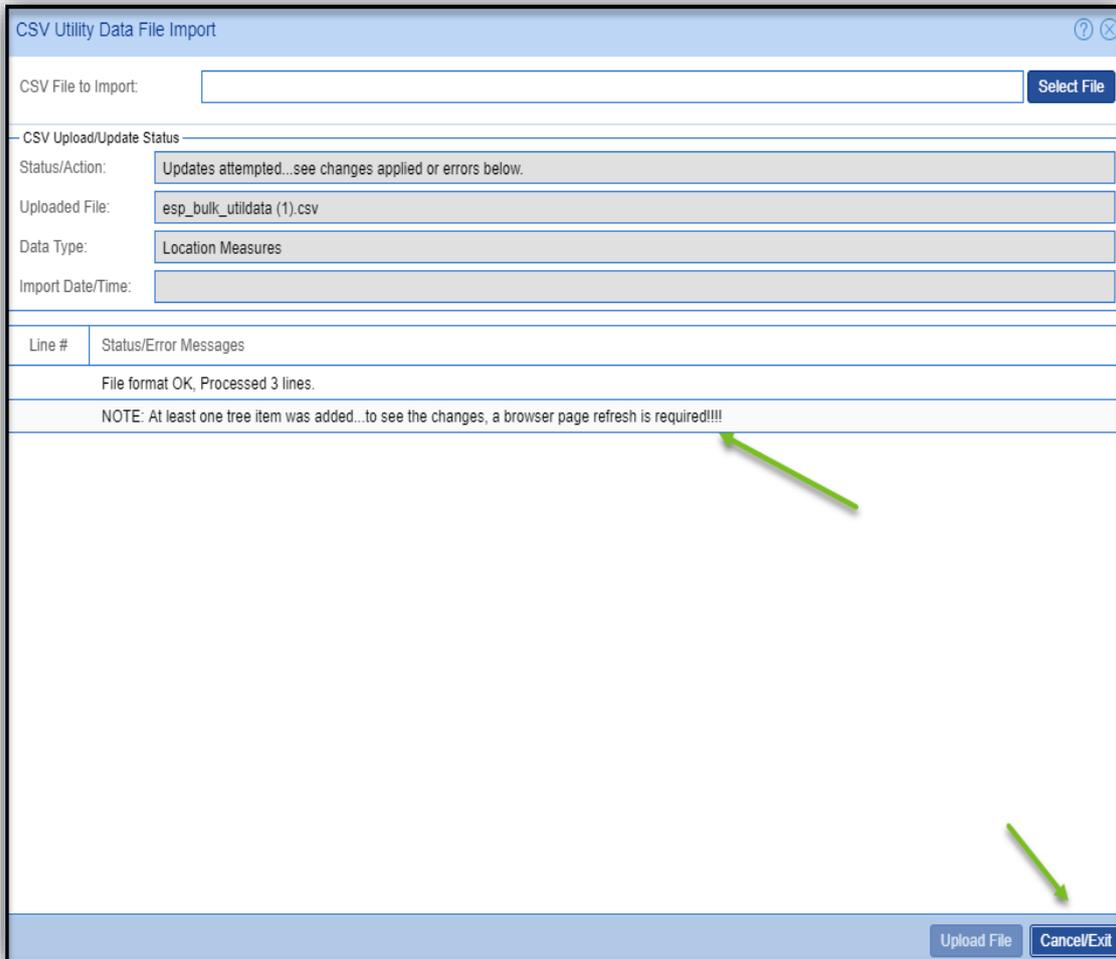
Line #	Status/Error Messages
	File format OK, Processing 3 lines.

Cancel Update/Load New File Apply Updates Cancel/Exit

After utility updates are applied, the following window appears with the message, “NOTE: At least one tree item was added...to see changes, a browser page refresh is required!!!!”

Click on the Cancel/Exit button.

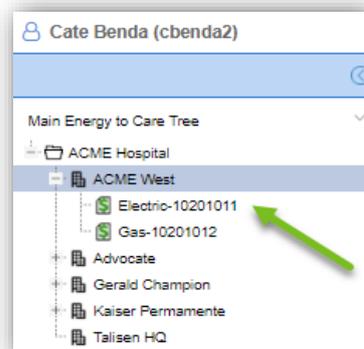
Refresh the web browser to view the applied updates.



View Utility Data Updates

Select a building within the Energy to Care Dashboard navigation tree to view its associated utility data accounts.

The Energy to Care Dashboard homepage displays energy performance views using successfully uploaded utility data for the selected building.



Manage Organization Access Requests (by Organization Administrators)
Organization Administrators have the authority to approve or deny access or new building requests submitted by other users.

Access requests are submitted by users who seek to subscribe to a specific building account in the Energy to Care Dashboard. If granted access, then subscribers can view Energy to Care Dashboard data for the requested building (not necessarily for the entire organization).

New building requests are submitted by users who seek to add a new building account to the Energy to Care Dashboard for a specific organization. An organization can represent a standalone health care facility, a health care campus comprised of multiple buildings, or a health care system comprised of multiple facilities and/or buildings.

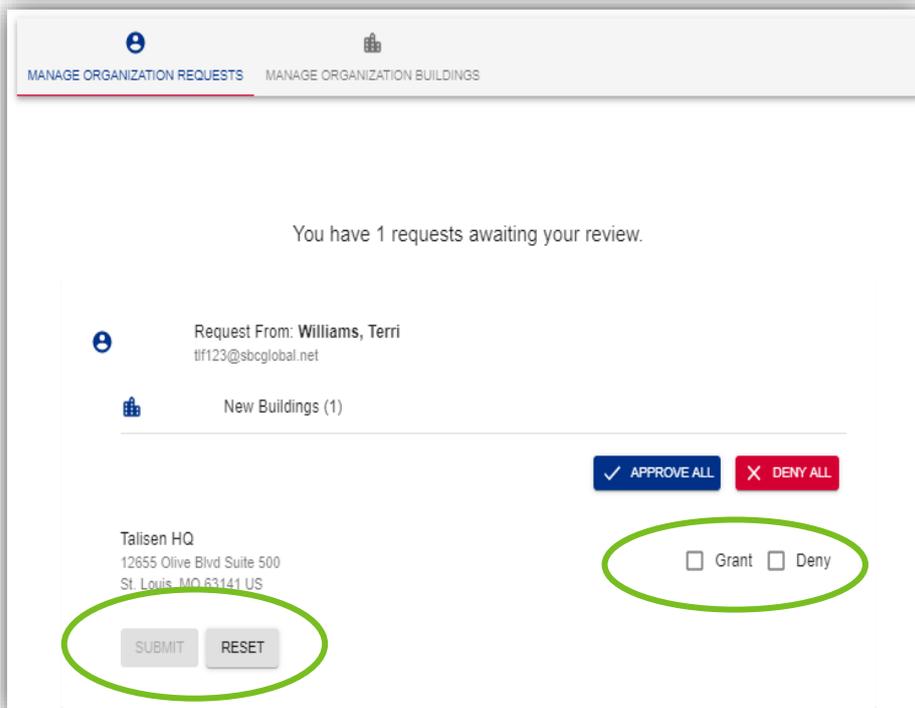
When a user submits an access or new building request in the Energy to Care Dashboard, the Organization Administrator receives a notification email.

Organization Administrators, click on the Submit button in the notification email, which reroutes to the Energy to Care Dashboard Log In screen.

Click on the Manage Buildings drop-down menu option at the top of the Energy to Care Dashboard homepage. Pending requests are listed in Manage Organization Requests.

Review the pending requests. Next, select one of the approval option boxes (“Grant” or “Deny”) and click SUBMIT.

If a new building was requested, a message will appear that the new building was created, if approved. The user will receive an email indicating if the request was approved or denied.



Subscriber Processes

The following processes are used by new subscribers (i.e., users) to request access to health care facilities in the Energy to Care Dashboard and to upload utility bill data.

Create New Account

To subscribe to the Energy to Care Dashboard as a new user, start at the Log In screen.

Click on the  button.

Welcome to the Energy to Care Dashboard

ENERGY to care H
Greater efficiency supports patient care.

twilliamsj

.....

Sign in Create New Account

[Password Reset](#)

For Energy to Care Dashboard assistance, contact the Talisen Help Desk at 877-317-7783

Next, click on the Request New Account option to begin the registration process (i.e., to submit a request to have an account created).

 Request New Account
Submit a request to have an account created.

 Request New Organization
Submit a request to have a new organization created.

Next, complete the User Account Request form. Required fields are identified with a red asterisk (*).

Click the **SUBMIT** button after the form is complete.

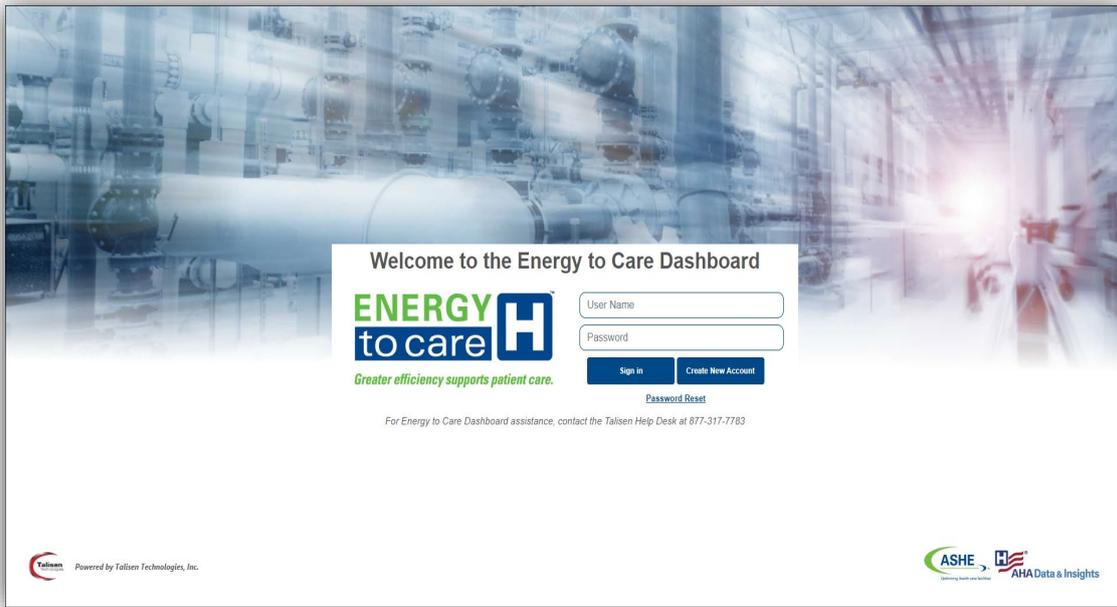
Once the form is submitted, submission is verified by an on-screen message and a confirmation email.

Open the confirmation email and click on the **SUBMIT** button within the body of the email.

The user will then receive a second email containing a user name and temporary password.

Click on the **SUBMIT** button within the body of the second email.

This action reroutes the user from the email to the Energy to Care Dashboard Log In screen.



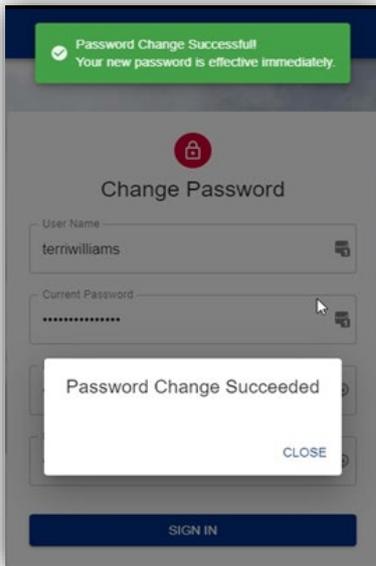
At the Log In screen, log into the dashboard with the supplied user name and temporary password.

Upon the first log in, the change password screen appears.

Enter the supplied user name in the User Name field.

Then, enter the supplied temporary password once in the “Current Password” field and a new password twice – once in the “New Password Field” and again in the “New Password Verify” field.

Next, click on the  button.



A confirmation message appears on screen when the password is changed successfully.

Click “CLOSE” and then log into the Energy to Care Dashboard with the newly created password.

Building Account Access within User’s Organization

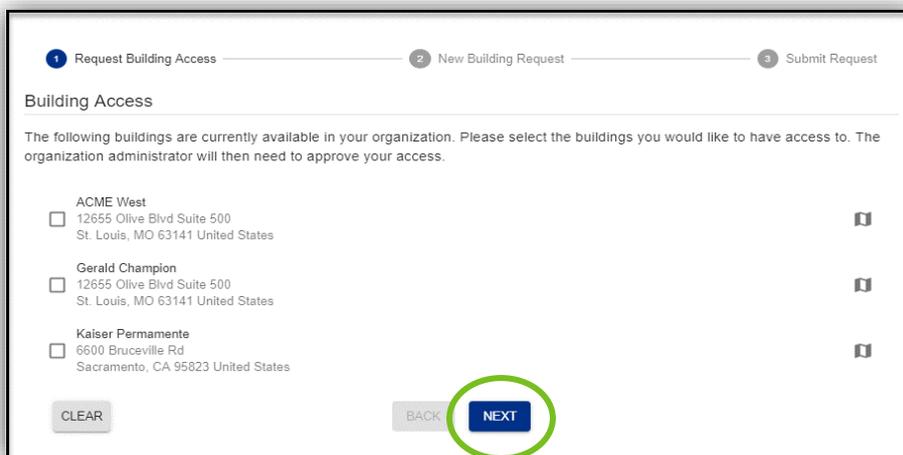
This process is intended for users who seek access to a building account within their own organization (subscriber access). The process is only applicable if the subscriber’s email domain is the same as the organization administrator’s email domain.

Existing Building Account Access

Once successfully logged into the Energy to Care Dashboard, the user is presented with the Building Access form. Complete this form to request access to a building or buildings within an existing Energy to Care Dashboard organization.

If a building account exists within the Energy to Care Dashboard, and if it’s assigned to the subscriber’s organization, then it’s listed in the Building Access form.

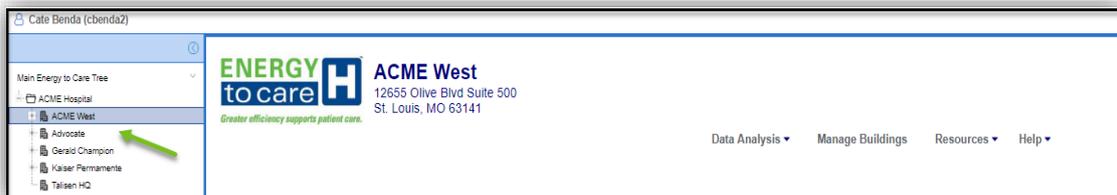
To request access to a building account, check inside the box next to the building listed and then click on the NEXT button.



After the request is verified and submitted by the user, a confirmation message appears on the screen. Additionally, the building access request is sent to the organization administrator via email for review and approval and a confirmation email is sent to the requestor.

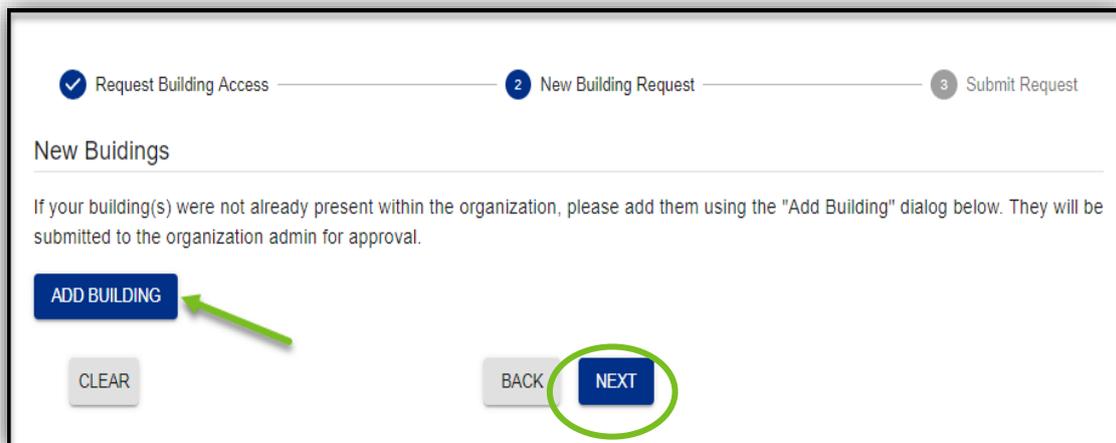
Once the organization administrator reviews the building access request, the requestor receives an email indicating whether the request was approved or denied.

If approved, the building appears in the requestor's Energy to Care Dashboard navigation tree, and s/he is then a subscriber to this building.



New Building Account Access

If the desired building is not listed, then click on the ADD BUILDING button. Then, click on the NEXT button.



After the New Building Request form loads, enter the new building information into the form. Required fields are identified with a red asterisk (*).

Click the **SUBMIT** button after the form is complete. See details below for further description of fields.

Tip: These definitions appear when the user hovers over the term/metric in the form.

- **Area Gross Sq/Ft:** Gross Floor Area should include all space within the building(s), including classrooms, administrative space, conference rooms, kitchens used by staff, lobbies, cafeterias, auditoriums, stairways, atriums, elevator shafts, and storage areas.
- **Facility Age (years):** Age should be identified as the appropriate range for the majority of the gross floor area and is typically equal to the number of years since original construction.
- **Labor Cost per Sq/Ft:** Unit Labor Cost equals the total annual labor expense per 1 gross square foot maintained.

After the New Building Request form is submitted, new buildings are displayed in the Building Access view.

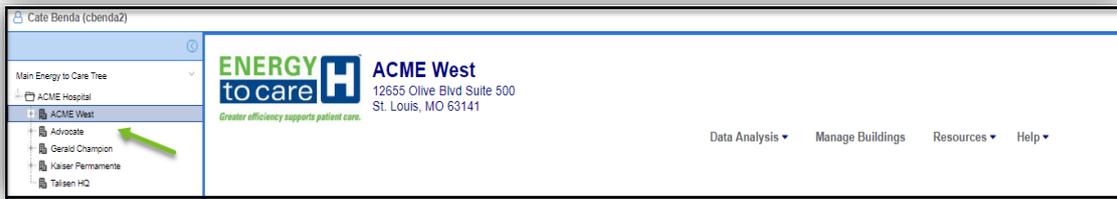
Click the NEXT button to continue the process.

When the Verify and Submit form appears on the screen, verify the request to create the new building(s) by clicking the SUBMIT button.

After the request is verified and submitted by the user, a confirmation message appears on the screen. Additionally, the new building request is sent to the organization administrator via email for review and approval and a confirmation email is sent to the requestor.

Once the organization administrator reviews the new building request, the requestor receives an email indicating whether the request was approved or denied.

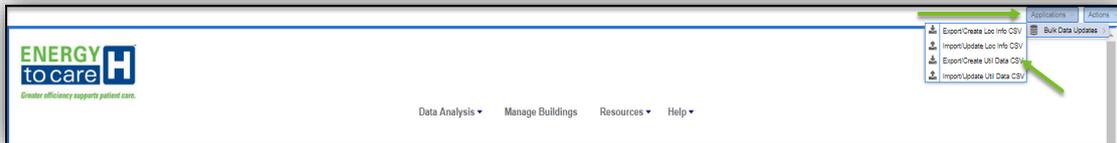
If approved, the new building appears in the requestor's Energy to Care Dashboard navigation tree, and s/he is then a subscriber to the new building.



Bulk Utility Data Uploads (by Subscribers)

The Bulk Data Updates feature allows users to upload new service period utility data and update existing service period utility data for existing accounts through a CSV template file.

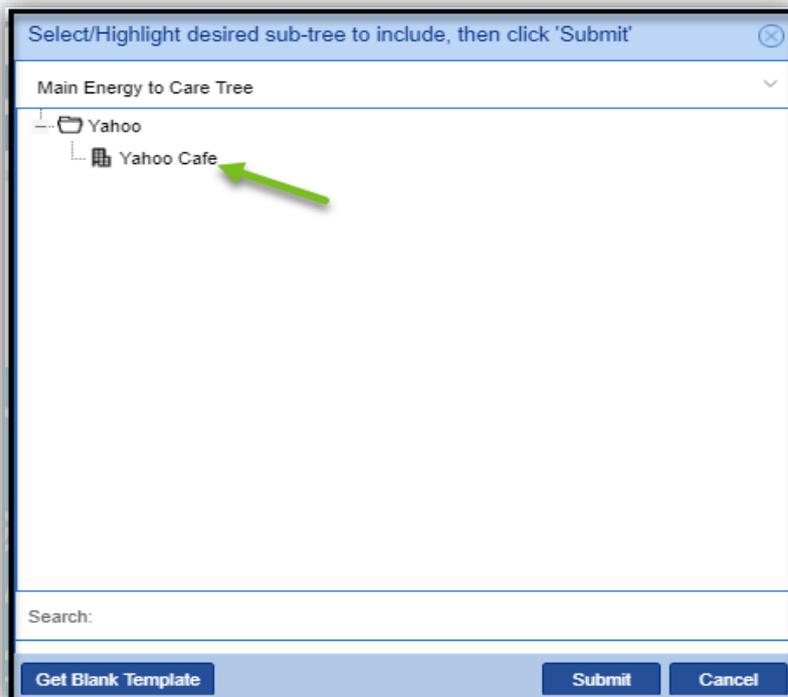
From the Energy to Care Dashboard homepage, select the Applications drop-down menu in the top right-hand corner of the screen. Hover over “Bulk Data Updates” and select “Export/Create Util Data CSV.”



Select the appropriate building from the navigation tree to upload utility data. If existing utility data is available (i.e., data sets for existing buildings in the Energy to Care Dashboard), users can download that data to view it formatted in the template CSV file. Existing data can be updated and reimported into the Energy to Care Dashboard.

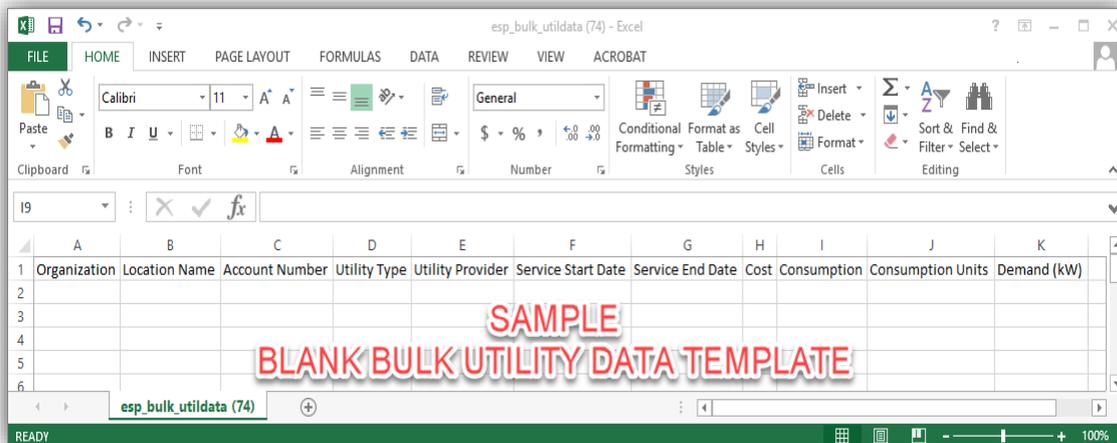
If no data exists in the Energy to Care Dashboard for the selected building, then click on the

Get Blank Template button to download a blank CSV file template, which should be used for the initial bulk utility data upload.



Utility Data Upload Form

The template CSV file exports to the Downloads folder on the user’s personal computer. A sample (blank) Bulk Utility Data template is provided in the following figure.



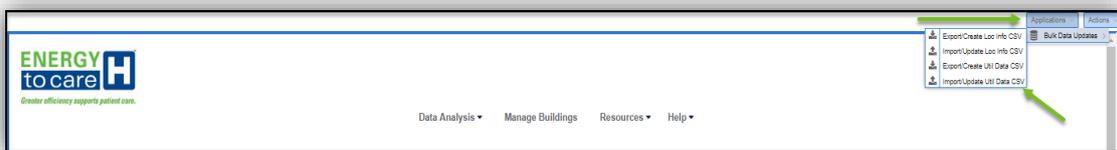
When completing the CSV file (i.e., spreadsheet), the following fields must be filled with accurate data:

- **Organization:** Enter the name of the organization, which should be listed at the top of the Energy to Care Dashboard navigation tree. For example, ACME Hospital is the health care system to which ACME West belongs; therefore, ACME Hospital is listed as the organization. The organization entered in the file must match the organization name exactly as displayed in the Energy to Care Dashboard navigation tree.
- **Location Name:** Enter the name of the hospital building listed under the organization. For example, ACME Hospital is the health care system to which ACME West belongs; therefore, ACME West is listed as the location name. The location name entered in the file must match the location name exactly as displayed in the Energy to Care Dashboard navigation tree.
- **Account Number:** The account number is assigned to the building by the utility provider and can be found on monthly utility bills.
- **Utility Type:** Identify the utility type as electric, gas or water.
- **Utility Provider:** The utility provider is the company or organization providing the utility to that building. The utility provider entered in the file must match the utility provider name exactly as displayed on the monthly utility bills. Verify the name for word and spelling accuracy.
- **Service Start Date:** The service start date (i.e., the first day of the service period) can be found on the monthly utility bill. Enter the date using the format m/d/yyyy.
- **Service End Date:** The service end date (i.e., the last day of the service period) can be found on the monthly utility bill. Enter the date using the format m/d/yyyy.
- **Cost:** Enter the service period utility cost provided on the monthly utility bill using the format xxxx.xx. Do not include dollar signs.
- **Consumption:** Enter the service period utility consumption (i.e., use or usage) provided on the monthly utility bill using the format xxxx.xx.

- **Consumption Units:** Enter the utility consumption units (e.g., kWh, MMBtu, therms, ccf) provided on the monthly utility bill. Units are case sensitive.
- **Demand (kw):** Enter the demand (kilowatts) provided on the monthly utility bill using the format xxxx.xx.

Import and Update Utility Data

Ensure all utility data is completely and accurately entered in the CSV file. Then, upload the file from the Energy to Care Dashboard homepage by clicking on the Applications drop-down menu in the top right-hand corner of the screen. Hover over “Bulk Data Updates” and select “Import/Update Util Data CSV.”



When the CSV Utility Data File Import form opens, click on the Select File button to choose a file to import (i.e., the completed CSV file).

Once the file is selected, click on the Upload File button to upload data saved to the CSV file into the Energy to Care Dashboard.

CSV Utility Data File Import

CSV File to Import: **Select File**

CSV Upload/Update Status

Status/Action: Click "Select File" above to select a CSV file, then select the "Upload File" button below.

Uploaded File:

Data Type: Location Measures

Import Date/Time:

Line #	Status/Error Messages

Upload File **Cancel/Exit**

A validation screen displays after the selected file is successfully uploaded.
Click on the Validate File Content button to validate the data.

CSV Utility Data File Import

CSV Upload/Update Status

Status/Action: File upload successful, select "Validate File Content" to continue.

Uploaded File: esp_bulk_utildata (76) GC.csv

Data Type: Location Measures

Import Date/Time: July 2, 2019 - 3:15:53 CDT (GMT-05:00)

Line #	Status/Error Messages
	File uploaded, not yet validated.

Buttons: Cancel Update/Load New File, Validate File Content, Cancel/Exit

Utility Data Errors

If errors exist within the entered data, then the validation function provides feedback to the user regarding these errors. Errors are listed in the CSV Utility Date File Import form as line items identified with red text. Each error is listed with a line number and error message.

Click on the Cancel/Exit button.

Open the selected CSV file. Using the feedback provided in the error messages, revise the data in the CSV file accordingly. Save all file revisions before attempting to upload it again.

The screenshot shows a web form titled "CSV Utility Data File Import". At the top, there is a text input field for "CSV File to Import:" with a "Select File" button to its right. Below this is a section titled "CSV Upload/Update Status" containing several fields: "Status/Action:" with the message "Errors exist in file as noted below. Please fix them then try again...UPDATE ABORTED.", "Uploaded File:" with "esp_bulk_utildata (1).csv", "Data Type:" with "Location Measures", and "Import Date/Time:" which is empty. Below the status section is a table with two columns: "Line #" and "Status/Error Messages". The table contains two rows of error messages:

Line #	Status/Error Messages
2	Consumption Units is invalid ('kwh'). Must be one of: [MMBtu, kWh].
3	Could not find sepecified location in system by Location Name....new accounts MUST have valid location assigned.

At the bottom right of the form, there are two buttons: "Upload File" and "Cancel/Exit". A green arrow points to the "Cancel/Exit" button.

Utility Data Update Check

When the utility data successfully validates, the upload/update process continues to the next stage. A “File verification complete...no issues found” message appears in the CSV Utility Date File Import form window.

Click on the Run Update Check button.

CSV Upload/Update Status	
Status/Action:	Format/Data verification passed. Select "Run Update Check" to continue.
Uploaded File:	esp_bulk_utildata (1).csv
Data Type:	Location Measures
Import Date/Time:	September 4, 2019 - 10:27:14 CDT (GMT-05:00)

Line #	Status/Error Messages
	File verification complete...no issues found.

Buttons: Cancel Update/Load New File, Run Update Check, Cancel/Exit

The Update Check function performs a pre-check on all utility data changes.

Click on the Apply Updates button.

CSV Utility Data File Import

CSV Upload/Update Status

Status/Action: Updates noted about to be made. If OK, select "Apply Updates" to run...LAST CHANCE to cancel updates

Uploaded File: esp_bulk_utildata (1).csv

Data Type: Location Measures

Import Date/Time: September 4, 2019 - 10:27:14 CDT (GMT-05:00)

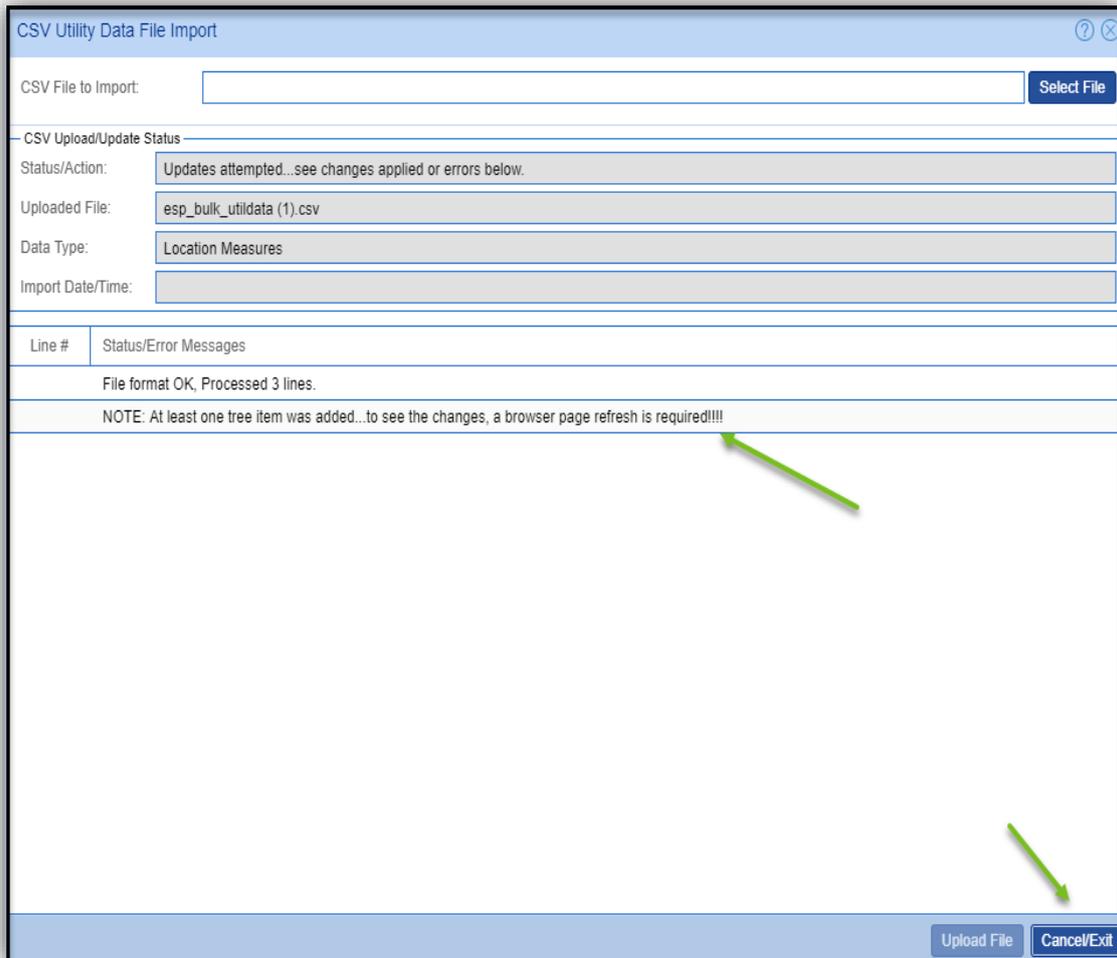
Line #	Status/Error Messages
	File format OK, Processing 3 lines.

Cancel Update/Load New File Apply Updates Cancel/Exit

After utility updates are applied, the following window appears with the message, “NOTE: At least one tree item was added...to see changes, a browser page refresh is required!!!!”

Click on the Cancel/Exit button.

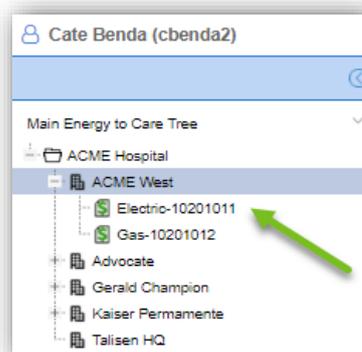
Refresh the web browser to view the applied updates.



View Utility Data Updates

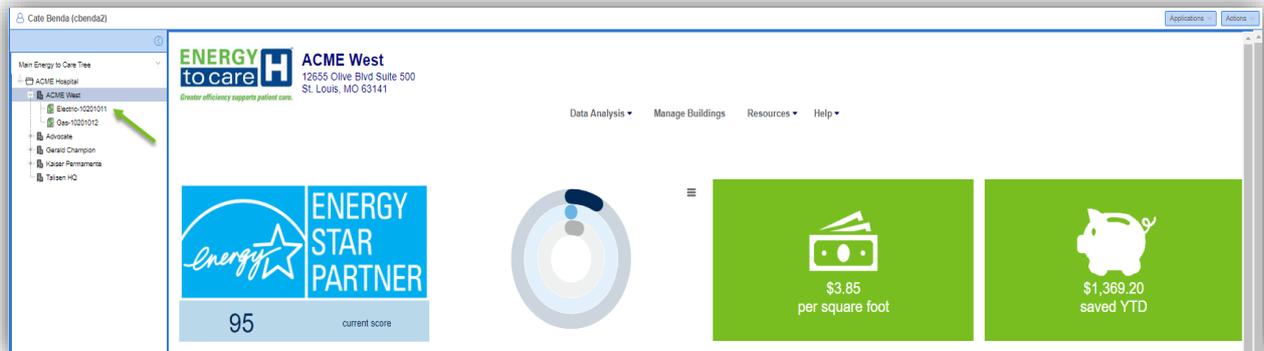
Select a building within the Energy to Care Dashboard navigation tree to view its associated utility data accounts.

The Energy to Care Dashboard homepage displays energy performance views using successfully uploaded utility data for the selected building.



View Utility Data in Homepage

Starting at the Energy to Care Dashboard homepage, select a building in the navigation tree. All uploaded utility data populates into the homepage views.



Manage Utility and Property Data

The Energy to Care Dashboard offers three methods for users to manage utility and property data. The first step in the data management process is to determine the authoritative data source: Energy to Care or ENERGY STAR® Portfolio Manager.

Option One / Energy to Care Managed

This method is for users who currently do not use ENERGY STAR® Portfolio Manager but seek to participate in the Energy to Care Program. In this scenario, users (i.e., organization administrators and subscribers) will maintain and monitor all utility and property data within the Energy to Care Dashboard. For more information on the data management process, refer to the Bulk Data Uploads section in this user guide. The Energy to Care Dashboard will coordinate data exchange with ENERGY STAR® Portfolio Manager in order to retrieve benchmark data which is presented through Energy to Care. In this scenario, the Portfolio Manager defined Property Type default is used to generate a calculated ENERGY STAR® score (as viewed on the homepage).

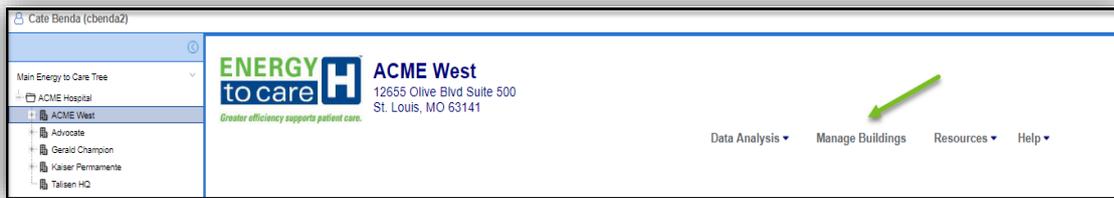
Option Two / ENERGY STAR® Managed/Energy to Care Visible

This method is for users who currently use ENERGY STAR® Portfolio Manager and intend to continue to use that platform for managing utility and property data. In this scenario, users (i.e., organization administrators and subscribers) will maintain all utility and property data within ENERGY STAR® Portfolio Manager. The Energy to Care Dashboard pulls data from ENERGY STAR® Portfolio Manager and retrieves benchmark data which is presented through Energy to Care. In this scenario, users cannot maintain data through the Energy to Care Dashboard. Instead, users share (read only) access to their ENERGY STAR® Portfolio Manager account with their Energy to Care Dashboard account.

Option Three / Energy to Care Managed/ENERGY STAR® Visible

This method is for users who currently use ENERGY STAR® Portfolio Manager but prefer to maintain and monitor all utility data within the Energy to Care Dashboard. In this scenario, users will maintain all utility data within the Energy to Care Dashboard but maintain property information within ENERGY STAR® Portfolio Manager. For more information on the utility data management process, refer to the Bulk Data Uploads section in this user guide. The Energy to Care Dashboard pushes utility data to ENERGY STAR® Portfolio Manager in order to retrieve benchmark data which is presented through Energy to Care. In this scenario, users should not use ENERGY STAR® Portfolio Manager to enter utility consumption and cost data since this data will not be retrieved and could be overwritten by the automated processes. Users are required to share (read and write) access to their ENERGY STAR® Portfolio Manager account with their Energy to Care Dashboard account.

Start at the Energy to Care Dashboard homepage. Select “Manage Buildings” from the drop-down menu options at the top of the page.



Click on “Manage Utility and Property Data for...” to assign how data is imported and exported.



Only the buildings which the user is authorized to manage are listed in the “Manage My Buildings” view.

Actions	Blgd Name	Address	Gross Area	Time Zone
	Acme Headquarters	12655 Olive Blvd Suite 500 Saint Louis MO, 63141 US	500	America/Chicago
	Acme Headquarters IV	12655 Olive Blvd Suite 500 Saint Louis MO, 63141 US	500	America/Chicago
	The Armory	1817 Belmont Ct Festus MO, 63028 US	1940	America/Chicago

5 rows | < < 1-3 of 3 > >

[SHARE NEW ENERGY STAR CONNECTION](#)

Click on a listed property to reveal and select the preferred method for managing data within the Energy to Care Dashboard. The red check mark identifies which data management method is currently assigned to the selected building.

The screenshot shows the 'Energy to Care' dashboard for 'The Armory' building. On the left, there is a sidebar with building details: 'The Armory', '1817 Belmont Ct', 'Festus MO, 63028 US', 'Current Sync Method: Energy to Care Managed/EnergyStar Visible', 'Tenant: Test Tenant', 'Building Time Zone: America/Chicago', 'Gross Area: 1,940 sq. ft.', 'Occupied Area: 1,340 sq. ft.'. The main content area has three panels:

- Energy to Care Managed:** 'Subscriber enters data into Energy to Care when the EnergyStar Score is estimated using Shadow EnergyStar Account. The estimate is based on default metrics for # of beds, sqft, etc.' It shows a laptop icon connected to the Energy to Care logo. A checkmark icon is visible in the bottom left corner of this panel.
- EnergyStar Managed/Energy to Care Visible:** 'Subscriber with EnergyStar Account who will use EnergyStar to enter all data.' It shows a laptop icon connected to the EnergyStar logo, which is then connected to the Energy to Care logo. A checkmark icon is visible in the bottom left corner of this panel.
- Energy to Care Managed/EnergyStar Visible:** 'Subscriber with active EnergyStar Account, but will use Energy to Care to enter all data.' It shows a laptop icon connected to the Energy to Care logo, which is then connected to the EnergyStar logo. A red checkmark icon is circled in green in the bottom left corner of this panel, indicating it is the selected method.

Change the data management method by clicking on the check mark icon inside the box of the new preferred method. Then, answer a series of questions related to sharing access to the building’s ENERGY STAR® Portfolio Manager account with the Energy to Care Dashboard.

If Option Two or Option Three is selected, the user is guided through a workflow of options which could include email notifications and user verifications. These additional steps ensure that ENERGY STAR® Portfolio Manager permissions (account and property) are granted appropriately by the end user.

After selecting Option Two or Option Three, an Establish ENERGY STAR® Portfolio Manager Connection form appears. Enter the ENERGY STAR® Portfolio Manager account Login ID and select the Type of Share from the drop-down menu options.

A help link (“How to Create ENERGY STAR® Connections”) is provided in the lower right-hand corner of the form. Click on this link for additional guidance with the selection process and for the ENERGY STAR® Portfolio Manager data share requirements.

 Establish EnergyStar Portfolio Manager Connection

* My EnergyStar Portfolio Manager Login ID

Property Data Administrator Login ID (If different than above)

* Type of Share x | v

SUBMIT REQUEST [How to Create EnergyStar Connections](#)

Click the SUBMIT REQUEST button after the form is complete.

Energy to Care Dashboard Homepage

This Energy to Care Dashboard homepage offers an at-a-glance view of a health care building's energy performance. Additionally, a series of drop-down menu options and links at the top of the page and a navigation tree along the left-hand side of the page provide several quick access features intentionally designed to enhance the user experience.

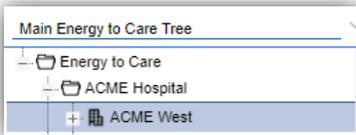


Dashboard Home Button



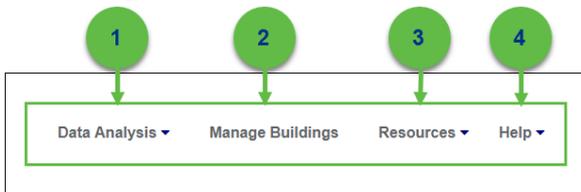
Navigate back to the Energy to Care Dashboard homepage by clicking on the Energy to Care Logo located in the top left-hand corner of the screen.

Navigation Tree



Select a building in the Energy to Care Dashboard navigation tree to populate data into the Energy to Care Dashboard homepage views.

Homepage Drop-Down Menus and Links



The drop-down menu options at the top of the homepage provide access to additional views, applications, and Energy to Care websites and resources.

1. **Data Analysis:** This drop-down offers detailed views to the user on energy performance, utility portfolio and utility gap analysis.
2. **Manage Buildings:** Several features are available via the Manage Buildings link: Request New Organization, Manage Organization, and Manage Utility and Property Data.
3. **Resources:** Several education resources are listed in this drop-down menu for quick access, such as the ASHE Energy to Care website, Energy to Care Treasure Hunt webpage, and Energy to Care FAQs (i.e., Section 1 of the Energy to Care Toolkit).
4. **Help:** Through the Help drop-down menu, the user has access to the Energy to Care Dashboard User Guide and ASHE Helpdesk.

Homepage Views

The Energy to Care Dashboard has been designed to be highly visual to reduce user burden as much as possible: with the dashboard, monitoring and observing energy use is as simple as using a fitness tracker to monitor steps. Below is a brief description of each homepage view, starting at the top, left-hand corner of the page.

ENERGY STAR® Score

The ENERGY STAR® Score view pulls data directly from ENERGY STAR® Portfolio Manager. The current score for the selected building is displayed if the score is available in ENERGY STAR® Portfolio Manager for that building's account.



If an actual ENERGY STAR® score is unavailable, then a link directs the user to ENERGY STAR® Portfolio Manager to set up an account.



Click on Set up your ENERGY STAR Portfolio Manager Account to reroute to ENERGY STAR® Portfolio Manager and set up a new account at no cost.

Awards Progress

The Awards Progress view tracks the building's year-to-date eligibility toward an Energy to Care Award. The Energy to Care Award honors health care facilities that reduce energy consumption by 10% in a single year or 15% over 2 years. The program also recognizes previous award winners that reduce energy consumption by 5%. The goal is that this feedback will encourage participants to monitor their building's energy performance on a monthly basis and achieve higher year-over-year energy savings.

The energy use reduction percentage is calculated by comparing energy use in the baseline year (which varies by 1-year or 2-year award type) to the performance year (i.e., the current calendar year). Energy use is defined as weather normalized source EUI in units of kBtus/sf/yr. A facility's current EUI data can be found by generating a report from ENERGY STAR® Portfolio Manager.

Two progress rings are displayed in this view: 1-year and 2-year energy use reduction goals. As energy use savings are accumulated, the darker shaded



areas fill in to show the current progress toward the respective energy use savings (EUI reduction) goal.

If a ring is completely (or more than) filled in at the end of the Energy to Care Award evaluation period, then the facility should be eligible for the indicated award if all other participant criteria is met.

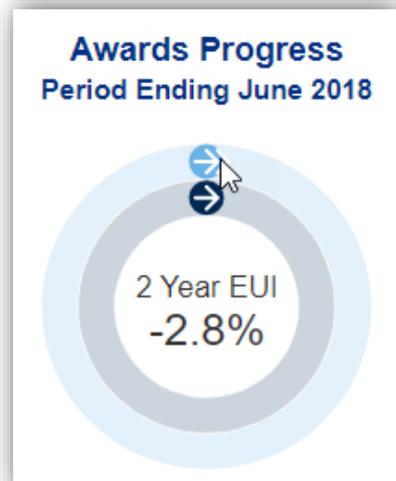
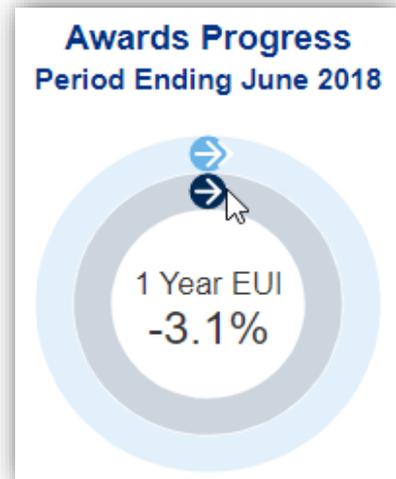
Both rings include a feature which displays the actual energy savings percentage value for each award type. The inner ring represents progress toward the 1-year energy reduction goal (5% for previous award recipients or 10% for all others), and the outer ring represents progress toward the 2-year energy reduction goal (always 15%).

Hover over the inner ring to display the current energy savings percentage value in the center of the rings. The text reads, “1 Year EUI” plus the percentage value (positive or negative depending on its comparison against the baseline period).

Similarly, hover over the outer ring to display the current energy savings percentage value in the center of the rings. The text reads, “2 Year EUI” plus the percentage value (positive or negative depending on its comparison against the baseline period).

When new utility data is uploaded to the Energy to Care Dashboard each month, the values in the rings automatically update to reflect the building’s progress toward award eligibility. Since the savings calculations consider year-to-date utility data, progress could exceed baseline performance one month but then change when the next month’s utility data uploads into the dashboard.

The percentage value for the rings could calculate as positive or negative. Additionally, the percentage value will be greater than 100% if the building exceeds its respective percentage goal.



Energy Cost Index (ECI)

The Energy Cost Index (ECI) widget displays the building’s energy cost per square foot. This metric is a rolling 12-month calculation determined by dividing the building’s total utility costs by its gross floor area. The index is based on non-adjusted (raw) utility costs, not weather-normalized or source-adjusted data. This widget does not consider stipulated or normalized utility rates in its calculation.



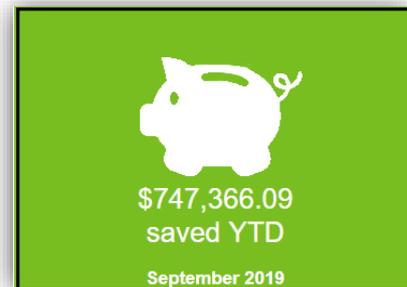
The user can select the end month for this calculation via the date selector feature located in the upper left-hand corner of the widget. The user can also select the utility type (natural gas, electricity or total) for the metric calculation via the drop-down menu located in the upper right-hand corner of the widget.

YTD Energy Cost Savings (\$)

The YTD (year-to-date) Energy Cost Savings widget displays the building’s cumulative energy cost savings (in dollars) for the current Energy to Care Awards year (i.e., the current calendar year). The current year’s costs are compared to the costs from the same months in the previous year (i.e., baseline year).

The savings (+ \$) or losses (- \$) are calculated using non-adjusted (raw) utility costs, not weather-normalized or source-adjusted data. This widget does not consider stipulated or normalized utility rates in its calculation.

The last period with useful cost data (Period Ending date) is displayed when the user hovers over the widget. This YTD Energy Savings widget is as current as the service period for the most recent set of uploaded utility bills.



See Bulk Utility Data Uploads in this user guide for more information on this process.

Chapter Challenge

The Energy to Care Chapter Challenge program allows ASHE affiliated chapters to participate in a friendly competition against one another in an effort to reduce their energy consumption. Each chapter must enroll at least five health care facilities in the Chapter Challenge to compete. Chapters are divided into two categories of participation: small chapter category (five to 15 enrolled health care facilities) and large chapter category (16 or more health care facilities). Each participating facility must have at least one ASHE member on staff in its organization. There is no cap on the number of participating facilities per chapter team.

The Energy to Care Chapter Challenge compares weather-normalized Source EUI between two, 12-month periods, each with a March 31 ending date. The chapter that demonstrates the greatest percent-based reduction in weather normalized EUI across the two periods will be the winner.

Utility data for each participating facility must be uploaded into the Energy to Care Dashboard no later than June 30 of the current Chapter Challenge year. See the Bulk Utility Data Uploads section of this user guide for more information about this process.

Calculation Measures

- **Source EUI:** a consecutive 12-month data set of the Source Energy Use divided by the property's gross floor area (sq. ft.)
- **Baseline Year** period consists of a fixed dataset: weather-normalized Source EUI during the previous Challenge Year, April 1 through March 31
- **Challenge Year** period ending consists of a fixed dataset: weather-normalized Source EUI during the current Challenge Year, April 1 through March 31

Calculation Methodology

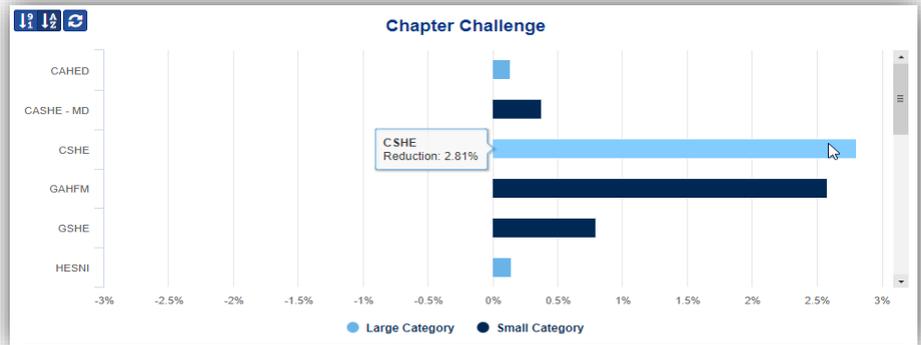
The Challenge Year period accumulating is a hybrid dataset between Baseline Year and Challenge Year. For example, Month 1 of the Challenge Year period compares Challenge Year Month 1 weather-normalized Source EUI plus Baseline Year Months 2-12 weather-normalized Source EUI against the full (Months 1-12) Baseline Year weather-normalized Source EUI. Similarly, Month 2 of the Challenge Year period compares Challenge Year Month 1 and Month 2 weather-normalized Source EUI plus Baseline Year weather-normalized Source EUI Months 3-12 against the full (Months 1-12) Baseline Year weather-normalized Source EUI. This comparison methodology continues until year ending when the full Competition Year dataset is compared against the full Baseline Year dataset.

The reduction in weather-normalized Source EUI between the Competition Year and the Baseline Year is the percentage represented in the Chapter Challenge widget (positive or negative percent comparison). A lower weather-normalized Source EUI in the Challenge Year compared to the Baseline Year is represented as a positive "savings" percentage. A higher weather-normalized Source EUI in the Challenge Year compared to the Baseline Year is represented as a negative "savings" percentage.

The Chapter Challenge chart represents how well each chapter is currently performing in the Chapter Challenge. Rankings are as current as the utility data uploaded into the Energy to Care Dashboard for each participating facility.

Chapters which are achieving positive energy savings are represented by a bar to the right of the origin ("0" on the number line), and chapters which are consuming more energy in the current Challenge Year compared to the Baseline Year are represented by a bar to the left of the origin. Chapters are identified by their large and small category classification, represented as light blue and dark blue bars respectively.

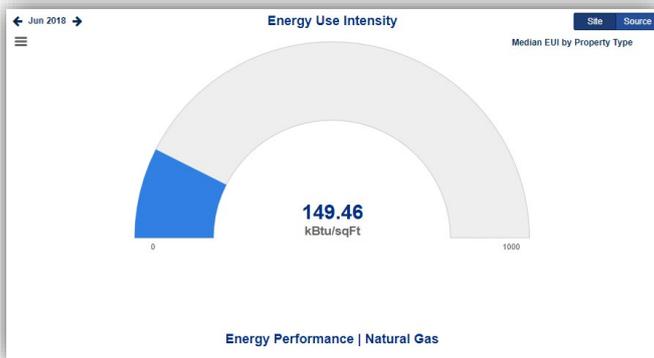
Use the toggle options in the upper left-hand corner of the Chapter Challenge widget to sort chapters by current ranking or alphabetically.



Energy Use Intensity (EUI) Gauge

The Energy Use Intensity, or EUI, gauge is a rolling 12-month metric that indicates total energy consumption (all utilities) divided by gross floor area (square feet) and is displayed in the units kBtu/sf, which equals one thousand Btu per one square foot. This metric is calculated using the utility and gross floor area data points provided by users or through data shared by ENERGY STAR® Portfolio Manager.

The Energy Use Intensity Gauge displays the building's current EUI in two ways: as the colored portion of the gauge compared to the gauge's range of 0 to 1,000 kBtu/sf and as the actual value provided below the graphic.



Use the toggle options in the upper right-hand corner of this widget to select between Site or Source EUI.

Select the preferred ending date using the date selector feature located in the upper left-hand corner of the widget. Click on the left error to move backward in time and click on the right arrow to move forward in time (if utility data is available).



Click on "Median EUI by Property Type" located in the upper right-hand corner of the widget to open and view the Median EUI by Property Type table.

Primary Function	Further Breakdown	Source EUI (kBtu/ft ²)	Site EUI (kBtu/ft ²)
Ambulatory Surgical Center		138.3	62.0
Hospital	General Medical & Surgical	426.9	234.3
	Other/Speciality Hospital	433.9	206.7
Medical Office		121.7	51.2
Outpatient Rehabilitation/Physical Therapy		138.3	62.0
Residential Care Facility		213.2	99.0
Senior Care Community		213.2	99.0
Urgent Care/Clinic/Other Outpatient		145.8	64.5

This table is updated each calendar year. Median EUI values are determined and published by the U.S. Department of Energy.

Click the Close button to close out of the table.

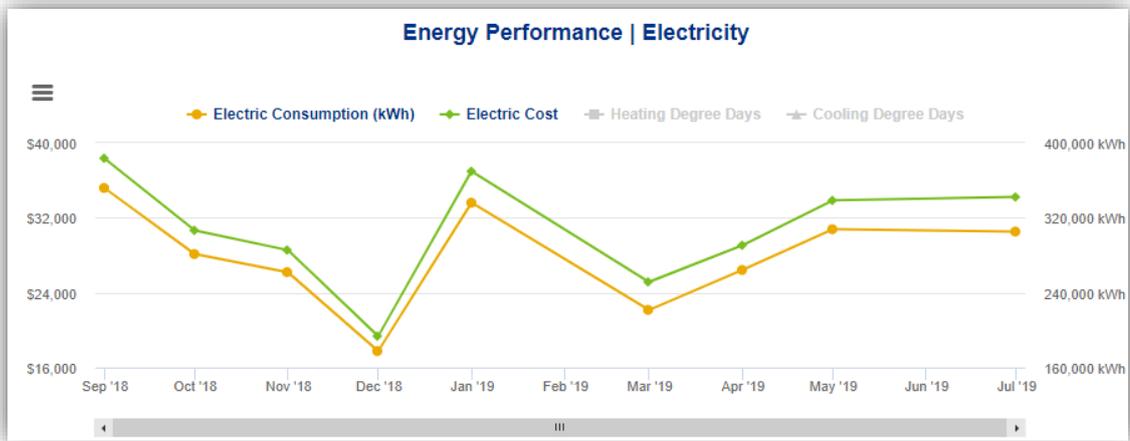
Energy Performance Graphs

The Energy Performance graphs display monthly energy cost and consumption trends. These data points are weather-normalized, and weather data can be toggled on or off each graph. Additionally, users can use the comments feature to note significant energy events such as equipment failure, energy savings measures and utility rate changes.

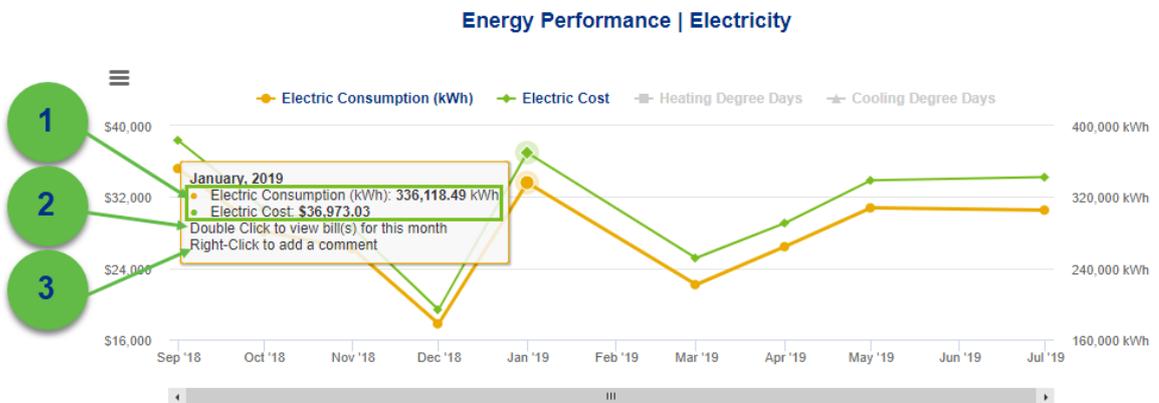
Three Energy Performance graphs are displayed on the Energy to Care Dashboard homepage: Electricity, Natural Gas and Total.

Energy Performance / Electricity

This line graph displays monthly electricity cost and consumption trend data for the most recent 12-month dataset uploaded to the Energy to Care Dashboard. Click on “Heating Degree Days” and/or “Cooling Degree Days” to toggle the weather overlays on and off.

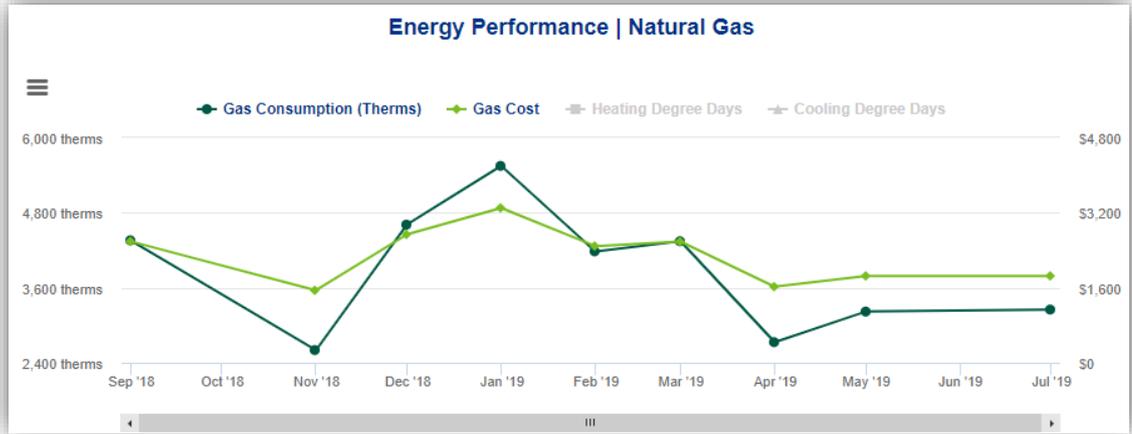


Hover over the graph to display a pop-up window, which clearly displays individual electricity consumption and cost data point values. Double-click inside the graph to view the electricity bill for the month displayed. Use the mouse to right-click on the graph to add a comment.

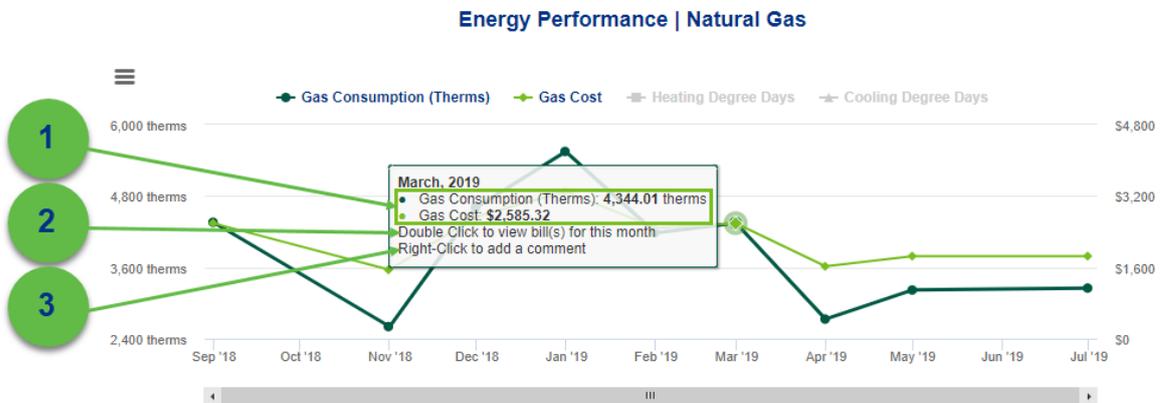


Energy Performance | Natural Gas:

This line graph displays monthly natural gas cost and consumption trend data for the most recent 12-month dataset uploaded to the Energy to Care Dashboard. Click on "Heating Degree Days" and/or "Cooling Degree Days" to toggle the weather overlays on and off.



Hover over the graph to display a pop-up window, which clearly displays individual natural gas consumption and cost data point values. Double-click inside the graph to view the natural gas bill for the month displayed. Use the mouse to right-click on the graph to add a comment.



Total Energy Performance

The Total Energy Performance line graph displays combined monthly electricity and natural gas cost and consumption trend data for the most recent 12-month dataset uploaded to the Energy to Care Dashboard. Click on “Heating Degree Days” and/or “Cooling Degree Days” to toggle the weather overlays on and off.



Hover over the graph to display a pop-up window, which clearly displays combined electricity and natural gas consumption and cost data point values. Double-click inside the graph to view the utility bills for the month displayed. Use the mouse to right-click on the graph to add a comment.

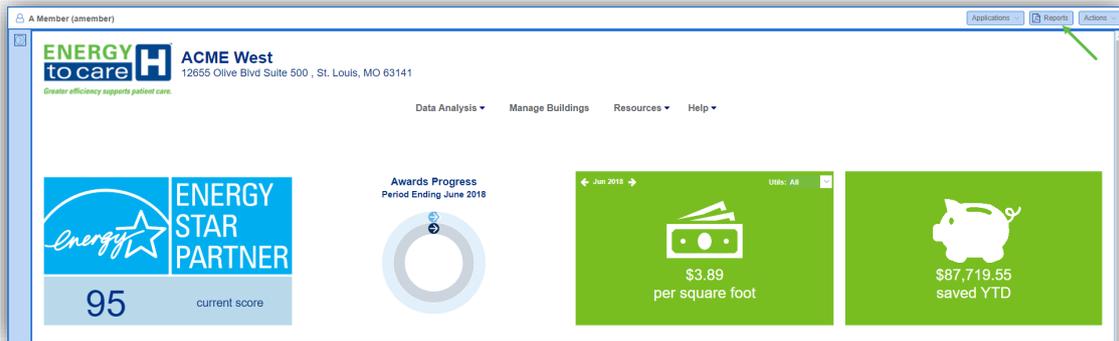


Reports

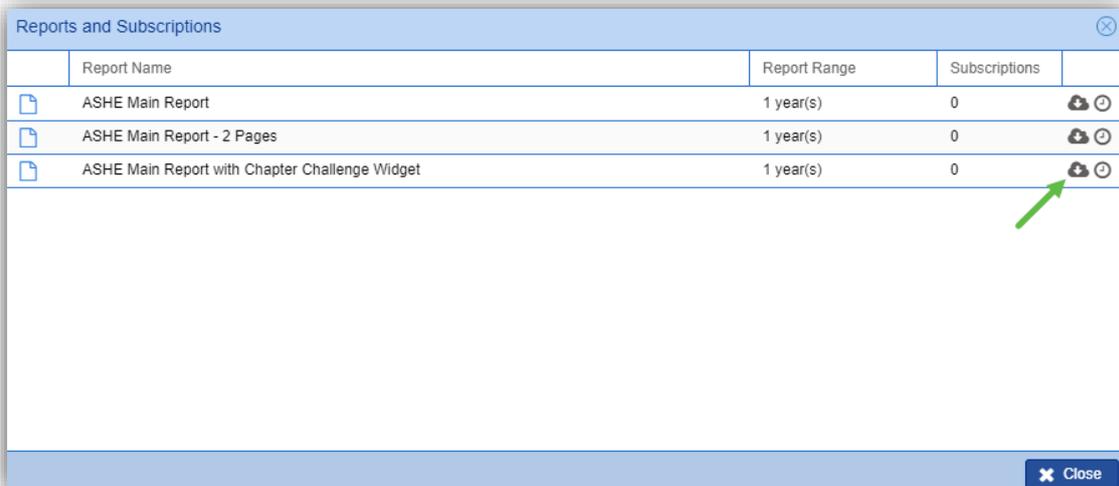
Several reporting features are available in the Energy to Care Dashboard, including the Reports link offered on the homepage.

Generating Reports

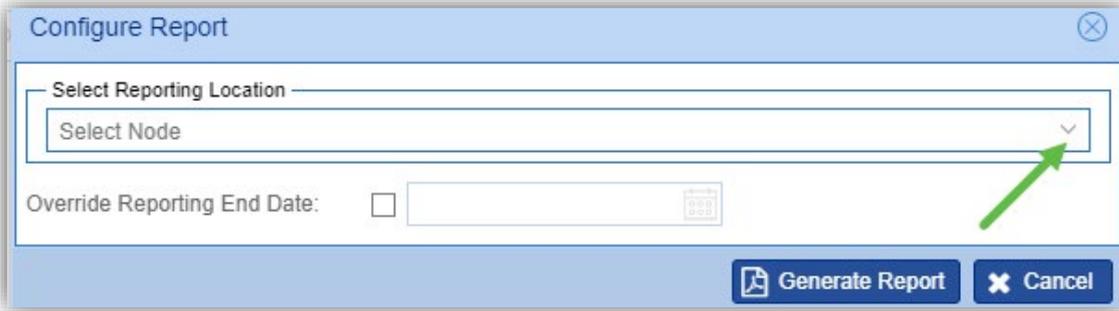
Starting at the Energy to Care Dashboard homepage, click the Reports button at the upper right-hand corner of the screen.



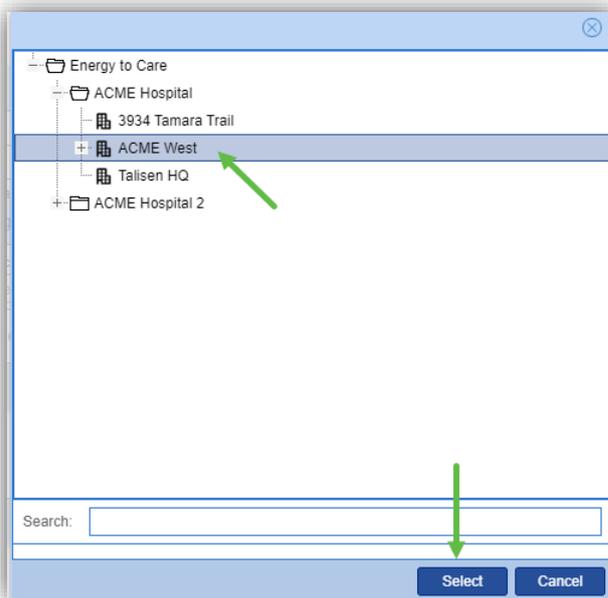
The Reports and Subscriptions window lists a menu of available reports. To download a specific report, click on its download icon (cloud with an arrow), shown on the right side of the window, to begin this process.



The cloud icon opens the Configure Report window. From here, select the Reporting Location (typically a building) for the desired report. Use the Select Node drop-down menu to open a navigation tree for building selection.

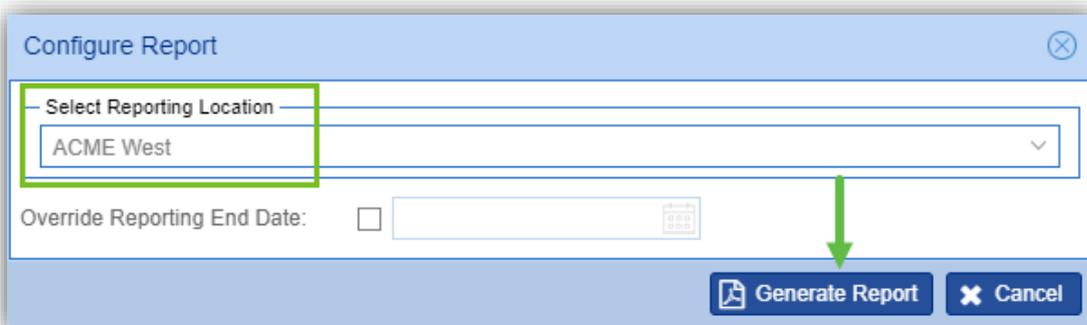


Click on a building to select it and then press the Select button.

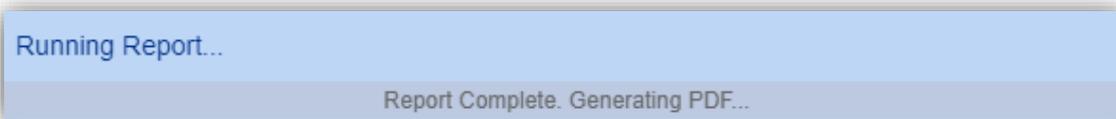
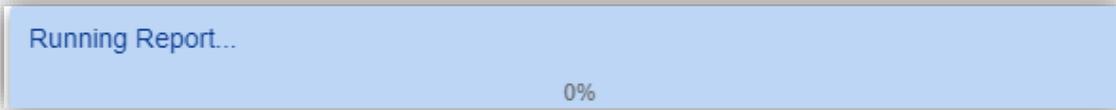


Confirm the preferred building is selected in the “Configure Report” window.

Then, click the Generate Report button.



Stand by while a series of progress messages provides updates on the reporting request.



The selected report generates in a PDF format and either downloads to the user’s personal computer (locate the file in the Downloads folder) or opens in a new web browser tab/window. If the report does not open, verify the computer’s pop-up blocker is disabled. Otherwise, it will prevent the Energy to Care Dashboard website from opening a new web browser tab/window.

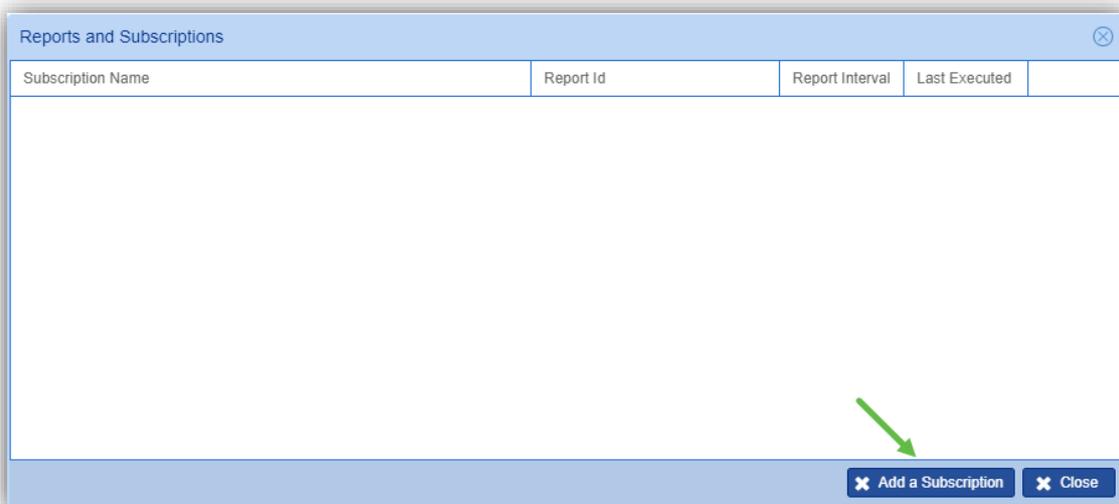
Click on the new web browser tab/window to view the report.

Report Subscriptions

The Energy to Care Dashboard offers the option for report subscriptions. This feature generates reports automatically and emails them to the user’s provided email address.

To add a new report subscription, start at the Reports and Subscriptions window.

Click on the Add a Subscription button.



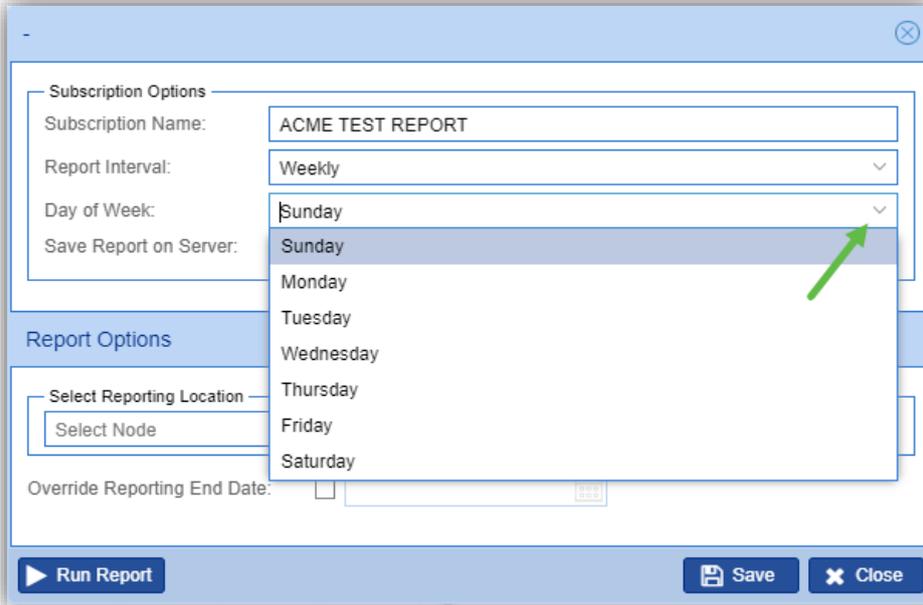
A new menu appears for subscription configuration. Complete this form to establish preferred subscription settings.

Provide a name for the report in the Subscription Name field.

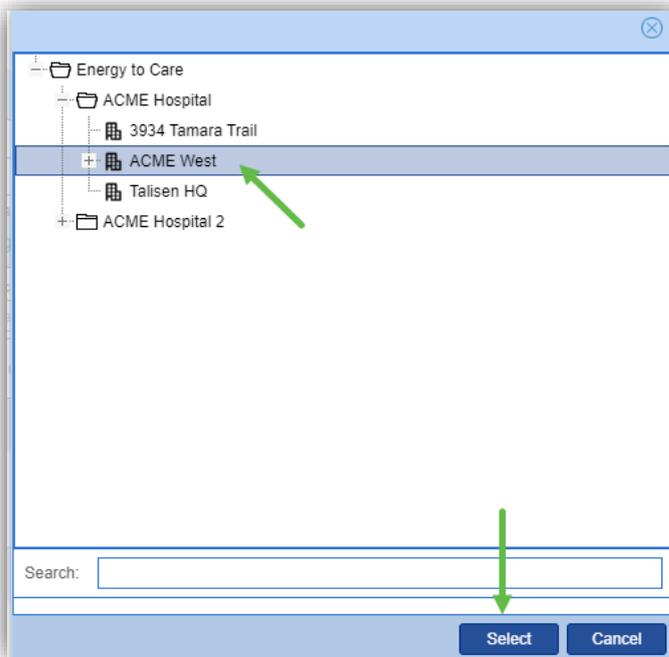
Using the drop-down menu provided in the Report Interval field, select a frequency interval for which the report is generated and sent via email.

The Weekly Report Interval option prompts the user to select the day of the week which the report is generated and sent via email.

Similarly, the Monthly Report Interval prompts the user to select the preferred day of each month, and the Yearly Report Interval prompts the user to select the preferred month of each year.



Use the Selecting Reporting Location (Select Node) drop-down menu to open a navigation tree for building selection. Click on a building to select it and then press the Select button.



Once the subscription configuration menu appears, verify all fields are complete and the preferred subscription configuration is shown.

Click on the Run Report button to test the configured report.

Click on the Save button to save the configuration settings.

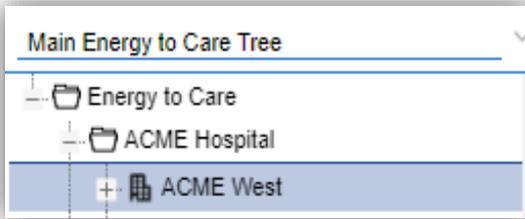
Click on the Close button to close out of the subscription configuration menu.

From the Reports and Subscriptions window, choose to run a report, edit a report subscription or remove a report subscription.

Subscription Name	Report Id	Report Interval	Last Executed	
ACME TEST REPORT	ASHEMainCC	WEEKLY		▶ ↗ ✕

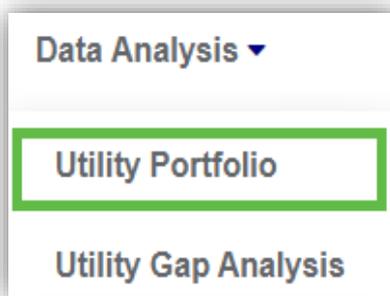
Data Analysis

The Data Analysis views are offered on the Energy to Care Dashboard homepage via a drop-down menu at the top of the page. Two detailed views provide users with a deeper dive into a building's energy performance: Utility Portfolio and Utility Gap Analysis.



Select a building listed within the Energy to Care Dashboard navigation tree (located on the homepage) to enable the Data Analysis views.

If a building is not selected, then utility data will not populate in these views.



Utility Portfolio

The Utility Portfolio feature displays a view of the selected building's utility bills and accounts.

Start at the Energy to Care Dashboard homepage.

To navigate to Utility Portfolio, use the Data Analysis drop-down menu at the top of the page and select Utility Portfolio.

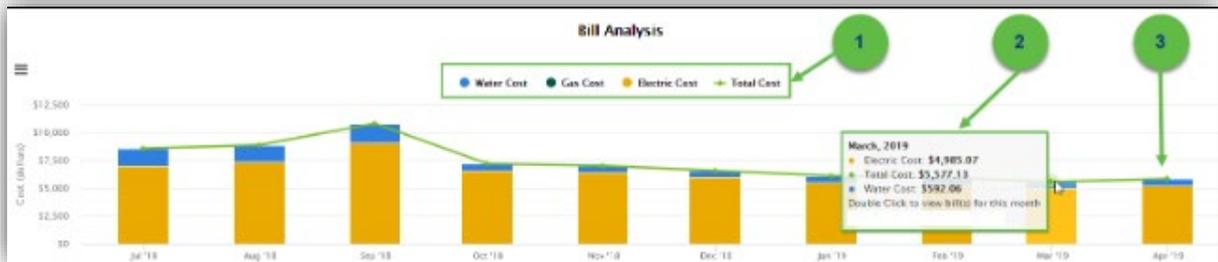
Two bar graphs are displayed in the Utility Portfolio view: Bill Analysis (green arrow 1 below) and Account Analysis (green arrow 2 below).



Bill Analysis

Refer to the diagram below for more detail on the features included in the Bill Analysis graph.

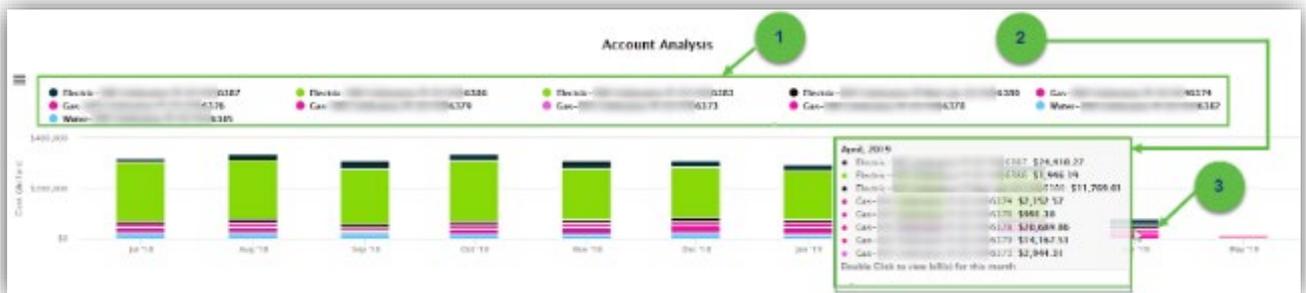
- **Legend:** indicates the utility types displayed in the Bill Analysis data series (green arrow 1 below)
- **Hover Box:** a pop-up window appears when the user hovers over the graph (green arrow 2 below)
 - View inside the box to clearly see the Cost values
 - Double click inside the graph to view an uploaded utility bill (PDF file)
- **Stacked Bar Data:** shows year-to-date utility cost data by utility type and month (green arrow 3 below)
 - As utility bill data is uploaded to the Energy to Care Dashboard by the user, the graph updates to display the most recent utility cost data for that billing period.



Account Analysis

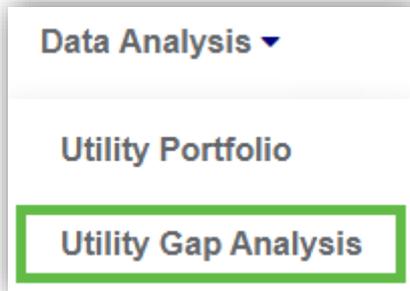
Refer to the diagram below for more detail on the features included in the Account Analysis graph.

- **Legend:** indicates the utility accounts displayed in the Account Analysis data series (green arrow 1 below)
- **Hover Box:** a pop-up window appears when the user hovers over the graph (green arrow 2 below)
 - View inside the box to clearly see the cost values
 - Double-click inside the graph to view an uploaded utility bill (PDF file)
- **Stacked Bar Data:** shows year-to-date utility cost data by utility account and month (green arrow 3 below)
 - As utility bill data is uploaded to the Energy to Care Dashboard by the user, the graph updates to display the most recent utility cost data for that billing period



Utility Gap Analysis

The Utility Gap Analysis feature displays interactive Month graphs and a table which is used to identify and isolate utility bill data integrity issues.

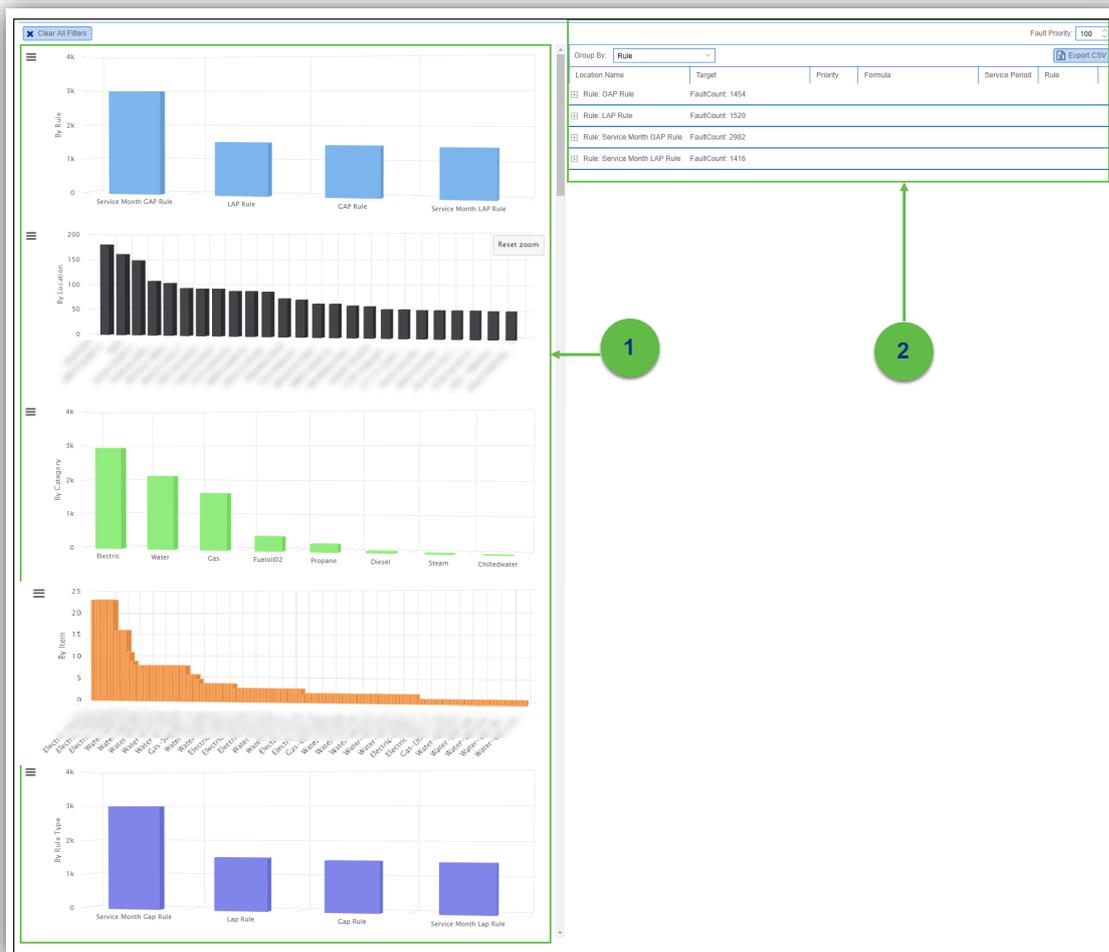


Consider it a checks and balances tool to ensure utility bills are entered into the system correctly and the minimum quantity of utility data is uploaded for complete and accurate calculations and to verify Energy to Care Award eligibility.

Start at the Energy to Care Dashboard homepage.

To navigate to the Utility Gap Analysis, use the Data Analysis drop-down menu at the top of the page and select Utility Gap Analysis.

A series of bar graphs is displayed on the left-hand side of the screen (green arrow 1 below) and a utility bill faults table is displayed on the right-hand side of the screen (green arrow 2 below).



Interactive Bar Graphs

The series of bar graphs display the various utility faults for the selected building, campus or entire navigation tree, as well as the fault counts using various metrics:

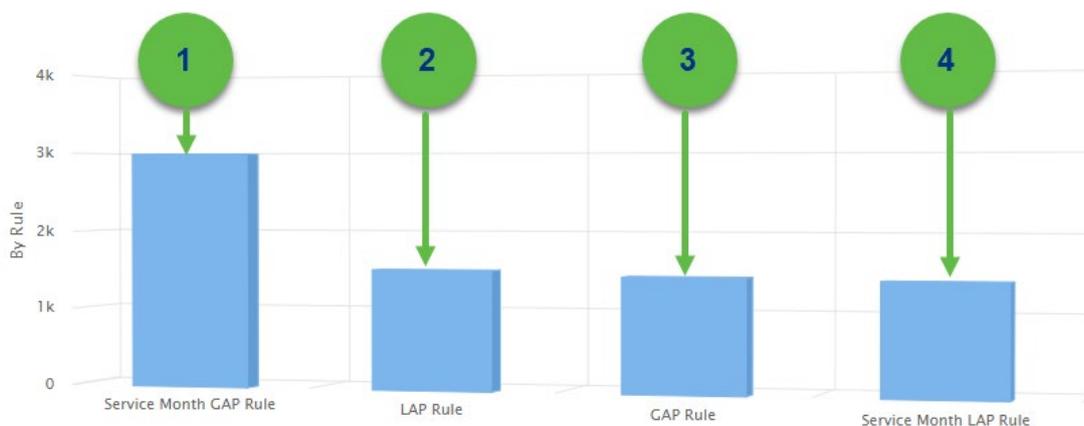
- By Rule (e.g., LAP Rule, Service Month LAP Rule, GAP Rule, Service Month GAP Rule, etc.)
- By Location
- By Category (e.g., Electricity, Natural Gas, Water, etc.)
- By Item (i.e., utility accounts)
- By Rule Types (Additional types will be added in the future)

Click on any chart bar to change its color to a darker shade and filter the list of related faults on the right (in the utility bill faults table). Click on additional bars within the same chart (or other chart) to further filter the list on the right. Use the Clear All Filters Button to bring back the entire utility faults list.

By Rule

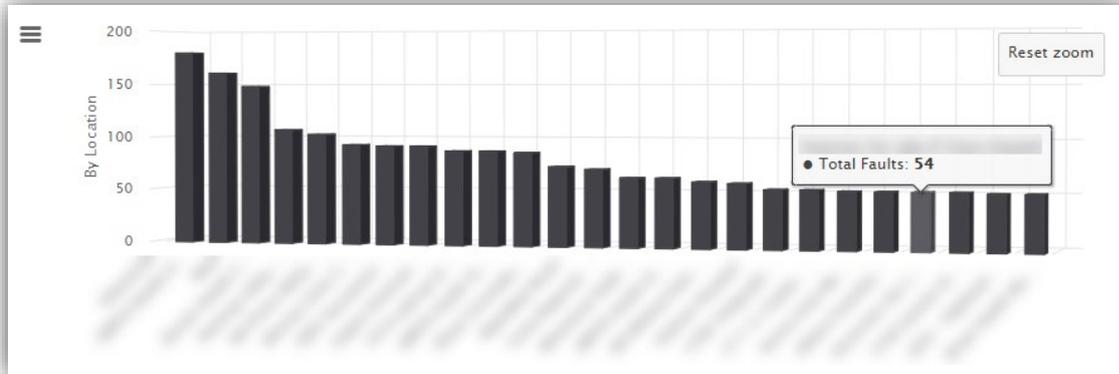
The first chart in the series displays four utility fault rule types and their respective current fault count.

1. **Service Month GAP Rule:** indicates at least one entire billing period (month) is not currently uploaded to the Energy to Care Dashboard (example: June 2018 is missing).
2. **LAP Rule:** indicates at least one billing day overlaps with the subsequent billing period (example: June bill ends on June 30, and the July bill starts on June 28).
3. **GAP Rule:** indicates at least one billing day is missing between two consecutive billing periods (example: June bill ends on June 28, and the July bill starts on June 30).
4. **Service Month LAP Rule:** indicates at least one entire billing period (month) overlaps with another billing period with utility data uploaded to the Energy to Care Dashboard (example: Two June 2018 bills exist for the same account).



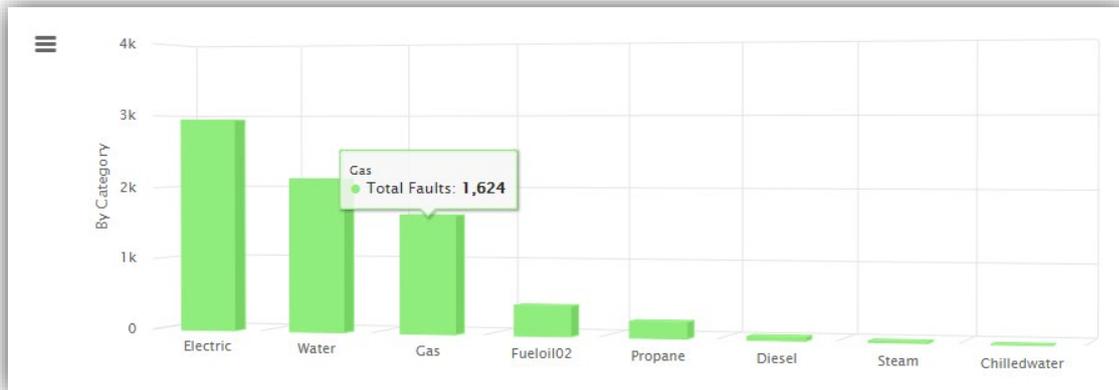
By Location

The second chart in the series displays utility faults by location and their respective current fault count.



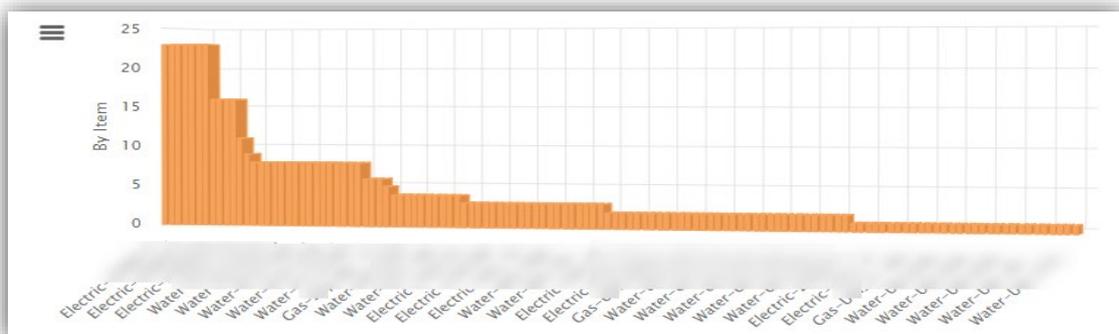
By Category

The third chart in the series displays utility faults by category, or utility type, and their respective current fault count. Typical utility types include electricity, natural gas and water.



By Item

The fourth chart in the series displays utility faults by item, or utility account, and their respective current fault count.



By Rule Type

The fifth and last chart in the series displays utility faults by rule type and their respective current fault count.

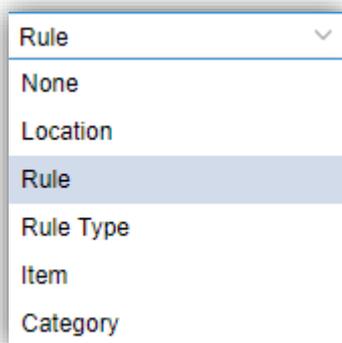


Utility Bill Faults Table

This table displays a grid of utility faults with details including fault location, billing period, priority and description.

Location Name	Target	Priority	Formula	Service Period	Rule
Rule: GAP Rule		FaultCount: 1454			
Rule: LAP Rule		FaultCount: 1896			
Rule: Service Month GAP Rule		FaultCount: 2983			
Rule: Service Month LAP Rule		FaultCount: 1416			

- 1. Group By:** groups the utility faults in the Grid, click on the drop-down menu to select how the utility faults are grouped: by Name, Location, Rule, Rule Type, Item or Category



- 2. Header:** identifies how the fields in each column are classified (e.g., Location Name)

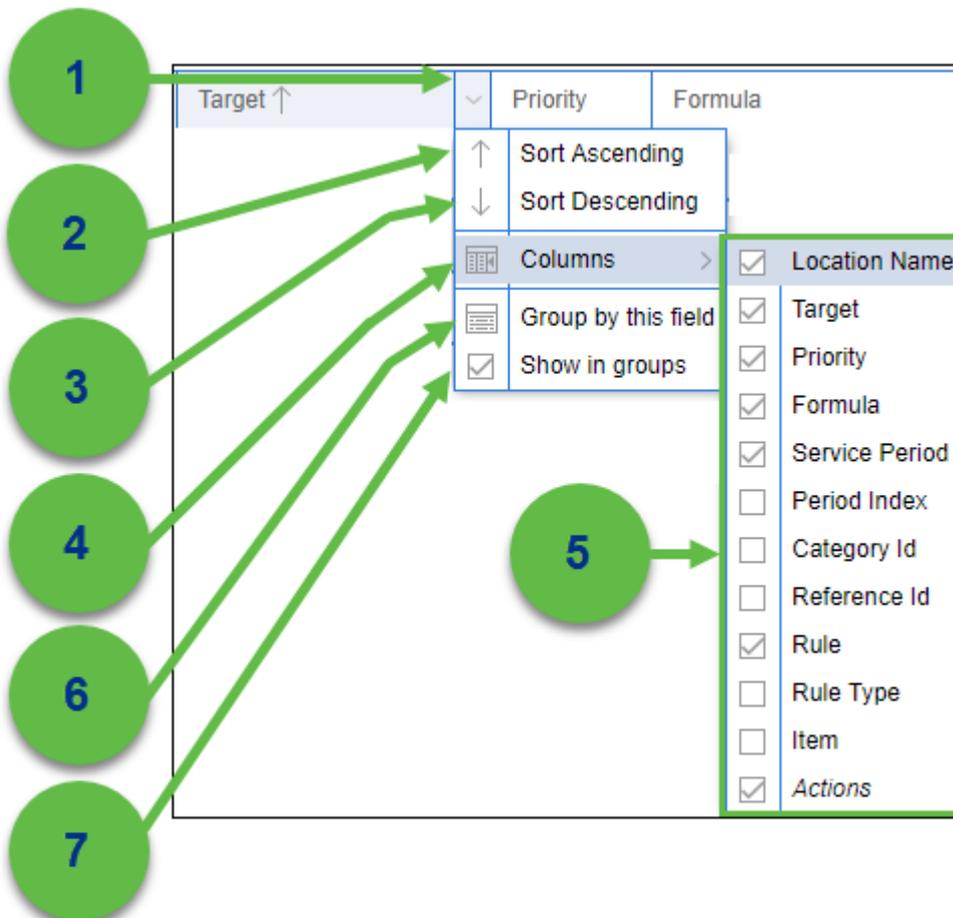


3. **Expand:** reveals additional details about the specific utility fault listed; click on the button (plus sign inside of a box) to expand the row and review the details
4. **Export CSV:** exports the utility faults table data to a CSV file on a user's personal computer

Click on the  **Export CSV** button to begin the download process.

The utility faults table includes additional features to support data organization.

1. View and select utility fault sorting options by clicking on the drop-down menu arrow in the Header section.
2. Select to sort the cell data in ascending order within the table column.
3. Select to sort the cell data in descending order within the table column.
4. Columns: use the drop-down menu to add or remove columns to the utility faults table.
5. Columns Drop-Down Menu Options: view and select from this list to add or remove columns to the utility faults table.
6. Select to group the table contents to this column.
7. Select (or de-select) the check box to show the utility faults in groups (or not).



Help

ASHE instilled additional resources to aid users in learning more about the Energy to Care Dashboard and Energy to Care Program.

Start at the Energy to Care Dashboard homepage.

Select “Help” from the drop-down menu option to reveal these additional resources.

Help Menu Options

- **User Guide:** The complete Energy to Care Dashboard User Guide is available online under the Help drop-down menu option located on the Energy to Care Dashboard homepage. A new webpage tab opens to reveal this document. As new features are added and updates are released, the user guide will be republished accordingly.
- **Contact ASHE:** Click on this link to email the ASHE Energy to Care team at energytocare@aha.org with any questions, comments, or feedback.

Talisen Helpdesk

For any additional questions, comments, or feedback, contact the Talisen Helpdesk at 877-317-7783. The Talisen Helpdesk is open Monday through Friday, 7:00 a.m. to 6:00 p.m. CST.

For issues or comments outside of office hours, leave a detailed voice message, and a Talisen Helpdesk Representative will be in contact the following business day.