

ENERGY PERFORMANCE PROGRAM PORTAL USER GUIDE

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1. Welcome to the EPP Portal

Welcome to the EPP Portal. Within this release of the portal, you can perform the following actions depending on your role and permissions.

Create an Account

- Create an account

Super-Administrator Capabilities

If you are a **Super-Administrator** for a company, you can:

- Create the company account
- Access all system permissions
- Transfer Super-Administrator access to another user
- Invite or approve a second user for the company
- Create, edit and delete facilities
- Run automated baseline energy modelling for your facility

User Capabilities (With Applicable Permissions)

If you are a user with the appropriate permissions, you can:

- Invite other users to join your company
- Approve user requests to join your company
- Assign and manage user permissions
- Manage the Participant Agreement (PA) process
- Create, edit, and delete facilities, including completing required data entry
- Check the data sufficiency of electricity and independent variable data for your facilities
- Run automated baseline energy modelling for your facilities
- Submit facilities for baseline model review

2. Account Sign-Up and Creation

There are two different types of accounts that can sign up for:

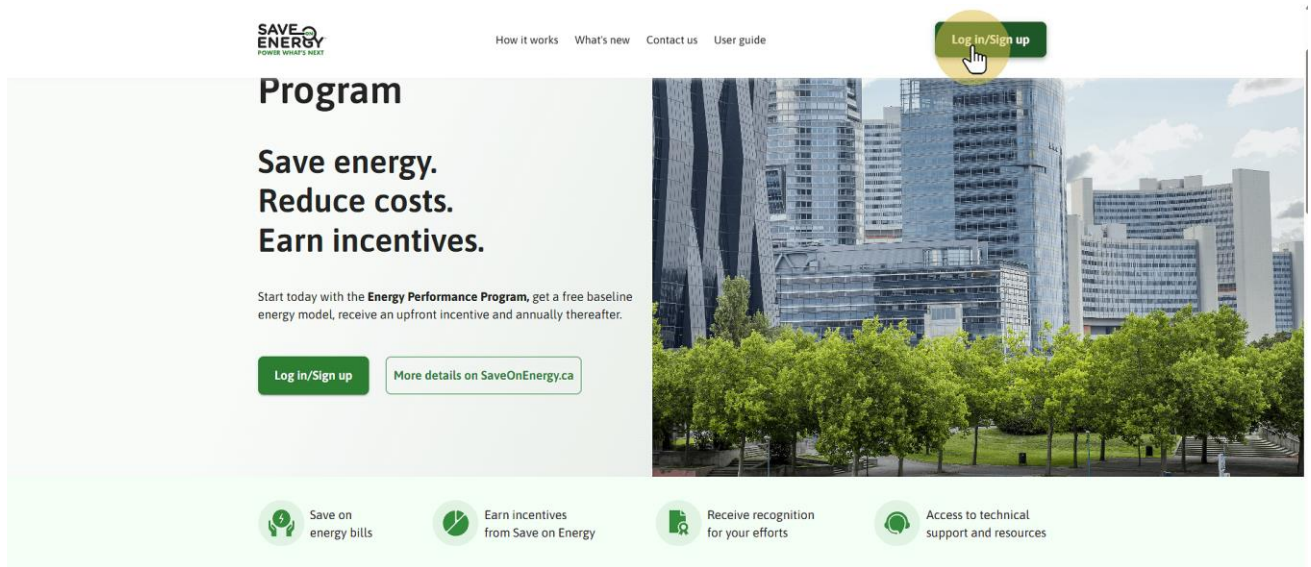
- 1) Super Administrator
- 2) Individual User

2.1 Super Administrator

If you will be responsible for creating the company account, please select super administrator. Please note that only one account can be a super administrator for a company. Additionally, that user cannot be associated with (have permissions to access) another company.

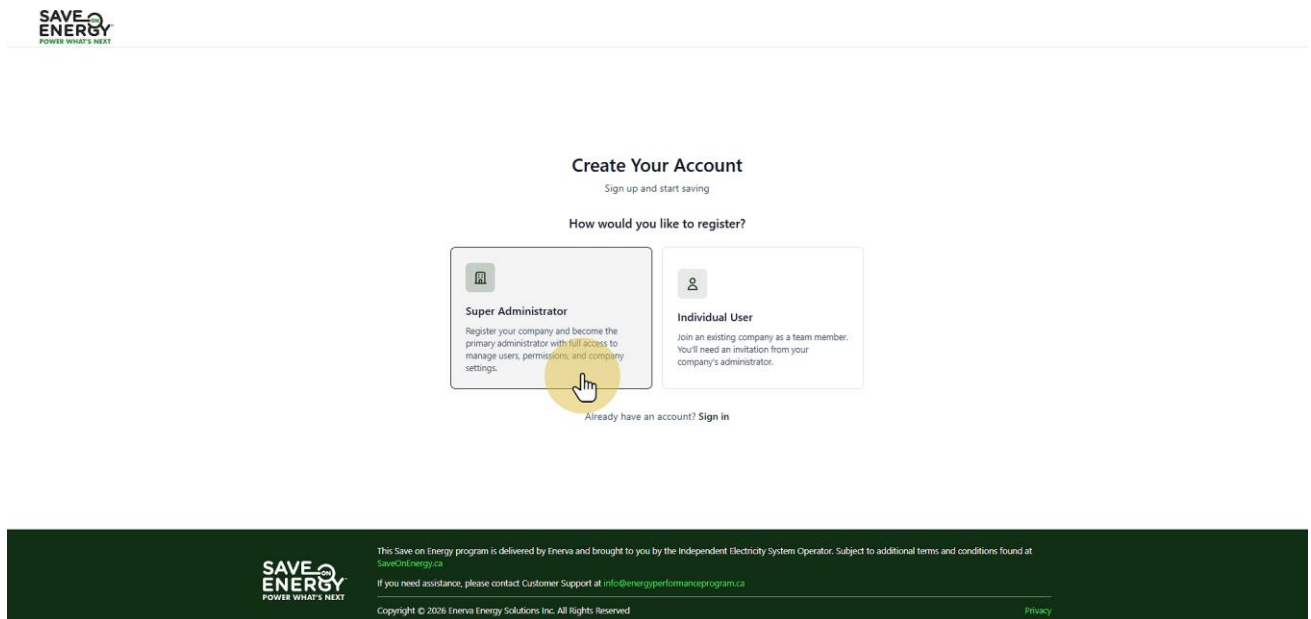
If you wish to sign up as a Super Administrator, please do the following:

On the Save on Energy homepage, click the **Log in / Sign up** button located in the top-right corner of the navigation bar. This action starts the account creation or login process and directs you to the registration selection screen.



On the Create your account screen, select **Super Administrator**. This option is for users registering a company for the first time and who will act as the primary administrator.

Click “**Super Administrator**”



- Enter your Personal Information

Super Administrator Registration

Step 1 of 3

1

2

3

Personal Info
Company Info
Review & Submit

Personal Information

First Name * Last Name *

Email Address *

Phone Number

Password *

Confirm Password *

Back: [Next: Company Information](#)

Already have an account? [Sign in](#)

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- Proceed to Company Information

After completing all required personal details and setting your password, click Next: Company Information to continue the registration process.

Super Administrator Registration

Step 1 of 3

1

2

3

Personal Info
Company Info
Review & Submit

Personal Information

First Name * Last Name *

Email Address *

Phone Number

Password *

Confirm Password *

Back: [Next: Company Information](#)

Already have an account? [Sign in](#)

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- Copy the 6-digit verification code in your email

Check your inbox for the **Email Verification** message. Locate and copy the **6-digit verification code**

- Enter the verification code

In the Verify Your Email pop-up, enter the 6-digit code sent to your email address to confirm ownership.

The screenshot shows the 'Super Administrator Registration' page at Step 1 of 3. A 'Verify Your Email' pop-up is centered on the screen. The pop-up contains an email icon, the text 'We've sent a verification code to johndoe@yopmail.com', and a section titled 'Enter 6-digit code' with six input boxes. Below this, it says 'Didn't receive the code? Resend code in 35s' and a 'Cancel' button. The background form is partially visible, showing fields for First Name, Email Address, Phone Number, Password, and Confirm Password. The 'Next: Company Information' button is at the bottom of the form.

- Enter your Company Information

In the Company Information step, enter your company information, description and address

The screenshot shows the 'Super Administrator Registration' page at Step 2 of 3. The 'Company Information' form is displayed. It includes fields for 'Company Name', 'Company Description' (with a placeholder 'Brief description of your company (optional)'), 'Industry Sector' (a dropdown menu), 'Website' (a text field with 'https://example.com'), 'Street Address', 'City', 'Province' (a dropdown menu), 'Postal Code', and 'Country' (a dropdown menu with 'Canada' selected). The 'Next: Review & Submit' button is at the bottom right of the form.

- Continue to Review and Submit

After completing all required company details, click **Next: Review & Submit** to review your entered information before final submission.

Step 2 of 3

Personal Info Company Info Review & Submit

Company Information

Company Name *

Test Company

Company Description

Brief description of your company (optional)

Industry Sector Website

Multi-Residential https://example.com

Street Address *

123 Test Street

City * Province *

Calgary Alberta

Postal Code * Country

A1A1A1 Canada

Back Next: Review & Submit

Already have an account? Sign in

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- Agree to the Terms of Service and Privacy Policy

On the **Review & Submit** page, check the box to confirm that you agree to the **Terms of Service** and **Privacy Policy**.

Super Administrator Registration

Step 3 of 3

Personal Info Company Info Review & Submit

Review & Submit

PERSONAL INFORMATION

Name Test boiler

Email johndoe@yopmail.com

Phone 123-456-7890

COMPANY INFORMATION

Company Name Test Company

Sector Multi-Residential

Address 123 Test Street

Calgary, Alberta A1A1A1

Canada

I agree to the [Terms of Service](#) *

I agree to the [Privacy Policy](#) *

Back Create Account

Already have an account? Sign in

SAVE ON ENERGY
POWER WHAT'S NEXT

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- Create Your Account

Once all information has been reviewed and agreements accepted, click **Create Account** to complete your Super Administrator registration.

Super Administrator Registration

Step 3 of 3

1
Personal Info

2
Company Info

3
Review & Submit

Review & Submit

PERSONAL INFORMATION

Name	Test boller
Email	johndow@yopmail.com
Phone	123-456-7890

COMPANY INFORMATION

Company Name	Test Company
Sector	Multi-Residential
Address	123 Test Street Calgary, Alberta A1A1A1 Canada

☒ I agree to the [Terms of Service](#) *
☒ I agree to the [Privacy Policy](#) *

Back
Create Account

Already have an account? [Sign In](#)

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Congratulations! Your registration has been completed for the Energy Performance Program Portal. On your Dashboard, you **must** proceed to signing a **Participant Agreement** before adding a facility

SAVE ON ENERGY
POWER WHAT'S NEXT

Demo Company + Request Access

Kosy Tester

Dashboard
Facilities
Participant Agreement
User Management
Integrations

Welcome, Kosy
Let's get started with your energy management

Facilities

0

Agreement

Pending

Team

1

Add Facility

Agreement

Team

Get Started with Energy Performance Program

Follow these simple steps to register your facility and start saving energy

1

Create Facility
Register your first facility in the system

2

Add Facility Information
Complete facility details and energy data

3

Submit for Baseline Model
Submit your facility for baseline analysis

4

Review & Accept Baseline
Review the baseline model results

5

Enrol Your Facility
Complete enrolment process

6

Start Saving Energy
Begin earning incentives for your facility

Important Note
Please note that signing the [Participant Agreement](#) is mandatory before you enrol your facility. All facilities in the facility list are included under the respective signed Participant Agreement.

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2.2 Individual User

If you are not responsible for creating the company account and you do not need full administrative access, sign up as an Individual User.

Tip: Individual users will have to be invited to companies or be approved after requesting to join them.

If you wish to sign up as an individual user, please do the following:

- Select Individual User Registration

On the **Create Your Account** screen, click Individual User to register as a team member joining an existing company.

SAVE ENERGY
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Create Your Account

Sign up and start saving

How would you like to register?

Super Administrator
Register your company and become the primary administrator with full access to manage users, permissions, and company settings.

Individual User
Join an existing company as a team member. You'll receive invitation from your company administrator.

Already have an account? [Sign in](#)

SAVE ENERGY
POWER. WHAT'S NEXT.

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- Enter Your Personal information

In the **Personal Information** section, Enter your first name, last name, email address and password

SAVE ENERGY
POWER. WHAT'S NEXT.

Individual User Registration

Step 1 of 2

1

2

Personal info Review & Submit

Personal Information

You'll need to be invited to a company or request to join one after registration.

First Name * Last Name *

Email Address *

Phone Number

Password *

Confirm Password *

[Back](#) [Next: Review & Submit](#)

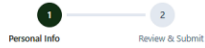
Already have an account? [Sign in](#)

- Proceed to Review & Submit

After completing all required personal information and creating a password, click **Next: Review & Submit** to continue.

Individual User Registration

Step 1 of 2



Personal Information

You'll need to be invited to a company or request to join one after registration.

First Name * Last Name *

Email Address *

Phone Number

Password *

Confirm Password *

[Back](#) [Next: Review & Submit](#)

Already have an account? [Sign in](#)

- Copy the Email Verification Code

Open the **Email Verification** message sent to your email address and copy the **6-digit verification code** shown in the email.

- Enter the Verification Code

In the **Verify Your Email** modal, enter the 6-digit code to confirm your email address.

The screenshot shows the 'Individual User Registration' form with the 'Verify Your Email' modal open. The modal contains the following text and fields:

Verify Your Email

We've sent a verification code to
Testbenjamin@yopmail.com

Enter 6-digit code

Didn't receive the code?
Resend code in 48s

[Cancel](#)

The background form shows the same fields as the first screenshot, with the 'Next: Review & Submit' button highlighted.

- Review Personal Information

On the **Review & Submit** screen, verify that your **name, email address, and phone number** are correct. Once confirmed, accept the **Terms of Service** and **Privacy Policy**, then proceed to **create your account**.

The screenshot shows the 'Individual User Registration' page, Step 2 of 2. A progress bar at the top indicates 'Personal Info' is complete and 'Review & Submit' is the current step. The 'Review & Submit' section displays the user's personal information: Name (Benjamin Test), Email (Testbenjamin@yahoo.com), and Phone (123-456-7890). Below this, a box titled 'What happens next?' lists three points: 'You'll need to be invited to a company by an administrator', 'Or you can request to join a company after registration', and 'Your permissions will be assigned by the company administrator'. Two checkboxes are present: 'I agree to the Terms of Service' and 'I agree to the Privacy Policy', both of which are checked. At the bottom, there are 'Back' and 'Create Account' buttons. A hand cursor is pointing at the 'Create Account' button. Below the buttons, it says 'Already have an account? Sign in'.

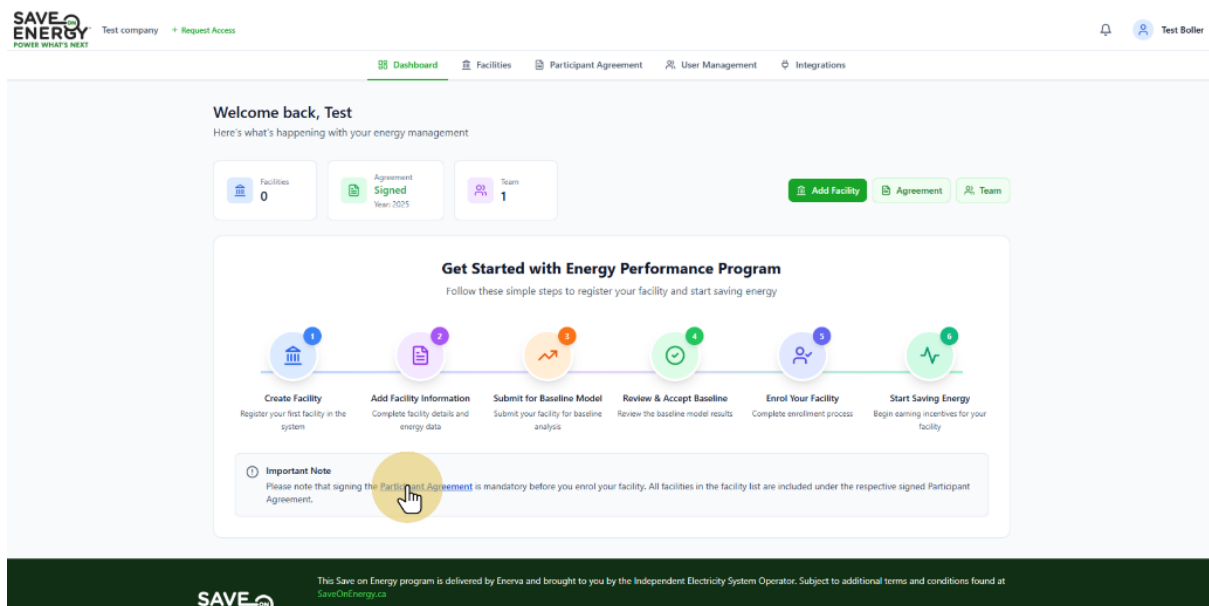
- Access the Dashboard

After registration, you are redirected to the dashboard, where you can view assigned facilities and begin using the platform once access is granted. From here you can also request access to join a company.

The screenshot shows the 'Save on Energy' dashboard for Benjamin Test. The top navigation bar includes the 'Save on Energy' logo, a '+ Request Access to Company' button, and a user profile icon labeled 'Benjamin Test'. The main content area has a 'Welcome, Benjamin' message and 'Let's get started with your energy management'. Below this, there is a 'Facilities' card showing '0' facilities. A hand cursor is pointing at a large yellow circle in the center of the dashboard. The bottom footer contains the 'Save on Energy' logo, a disclaimer about the program being delivered by Enerva, and copyright information for 2026 Enerva Energy Solutions Inc.

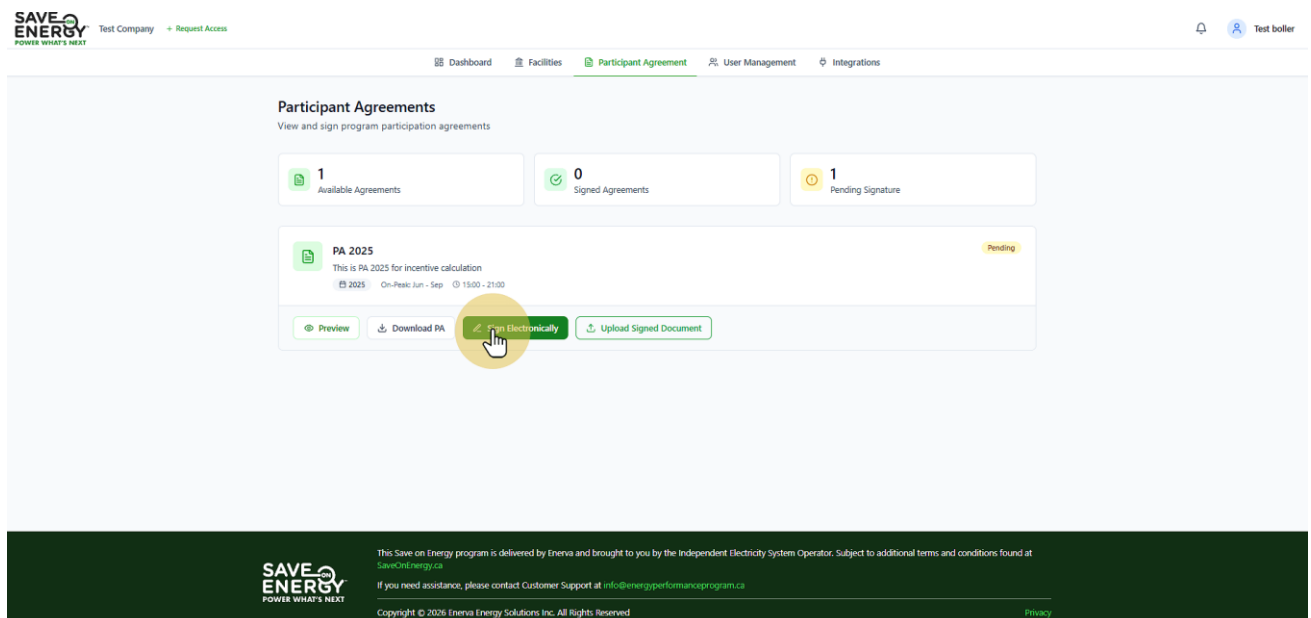
3. Participant Agreement

Before a facility can be created, a Participant Agreement must be signed. From your dashboard, select the Participant Agreement link and complete the signing process.



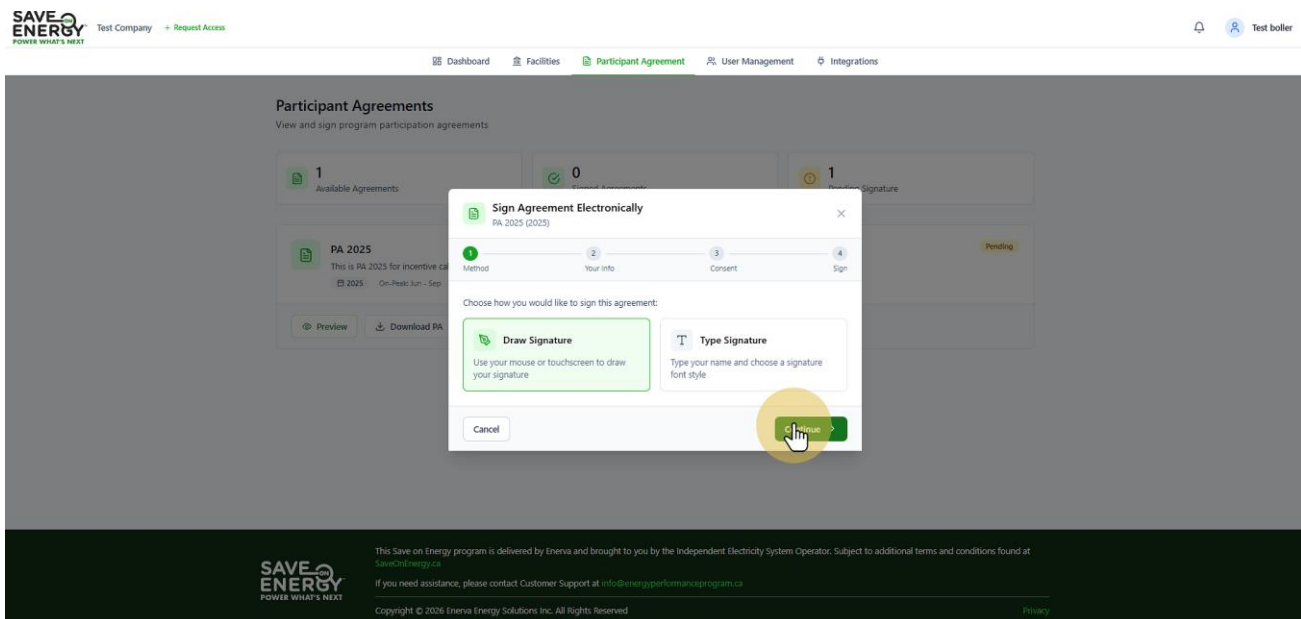
3.1 Sign Electronically

Click “Sign Electronically” to begin the electronic signing process for the selected Participant Agreement.



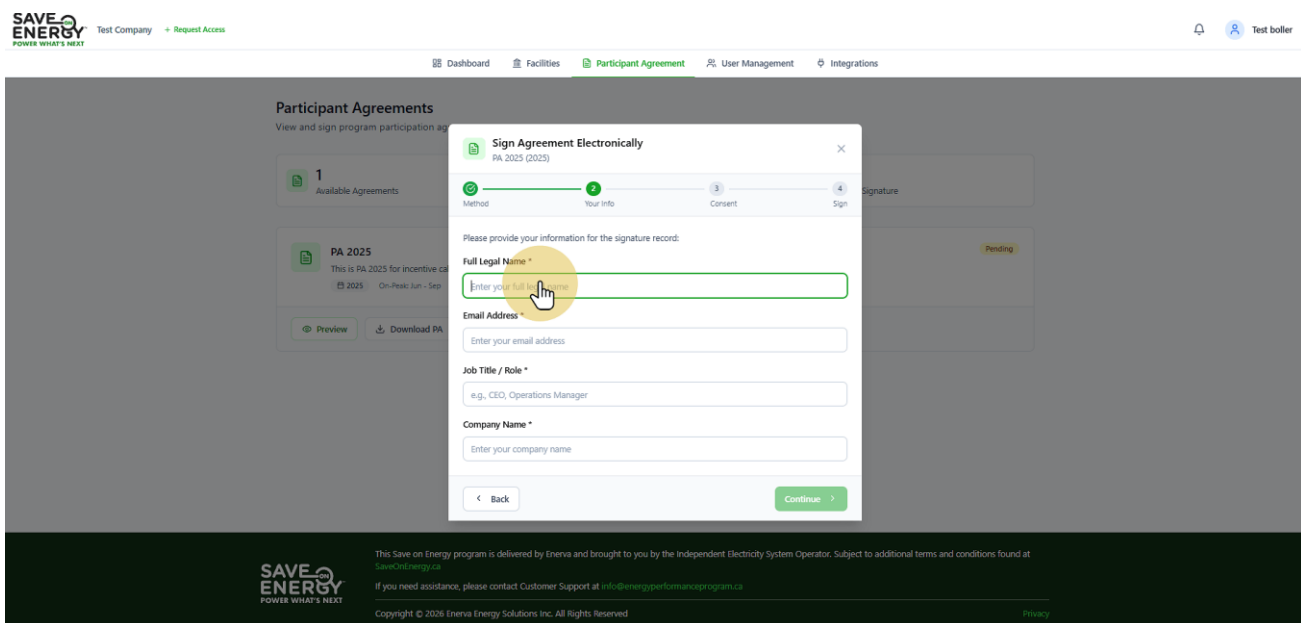
- Choose Signature Method

Select how you want to sign the Participant Agreement. You can either **draw your signature** using a mouse or touchscreen or **type your name** and choose a signature font. Once your preferred method is selected, click **Continue** to proceed with the electronic signing process.



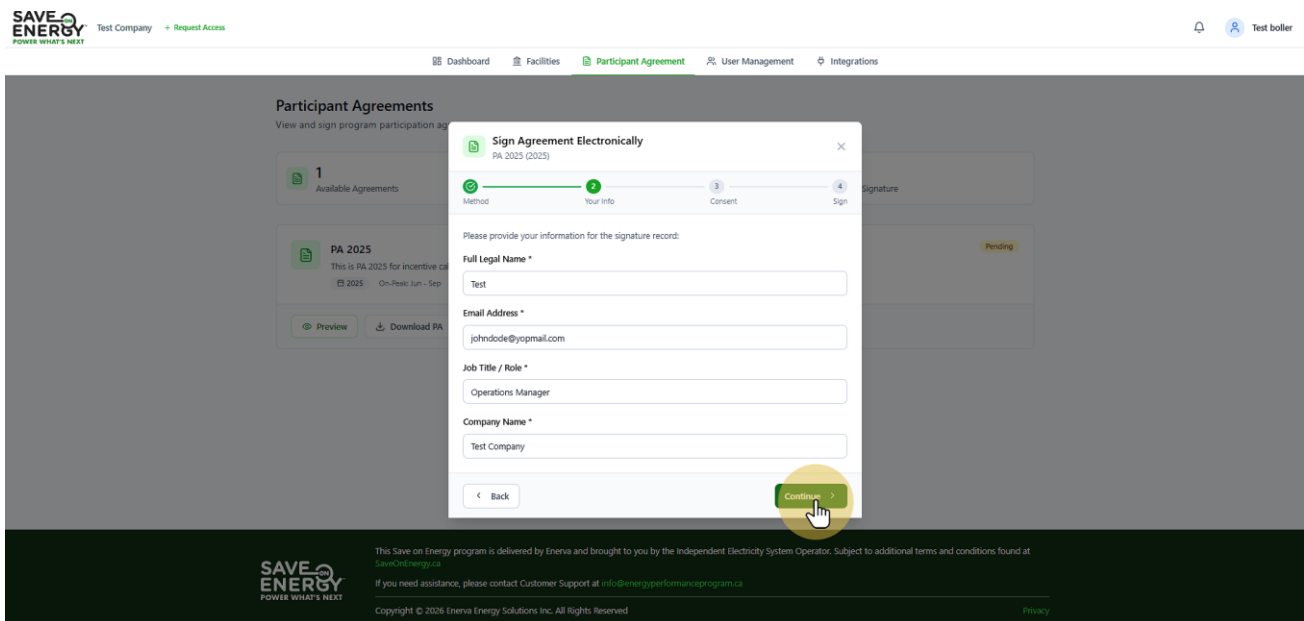
- Provide your information for your signature

Provide your legal name, email address, Job role and company name to sign the participant agreement.



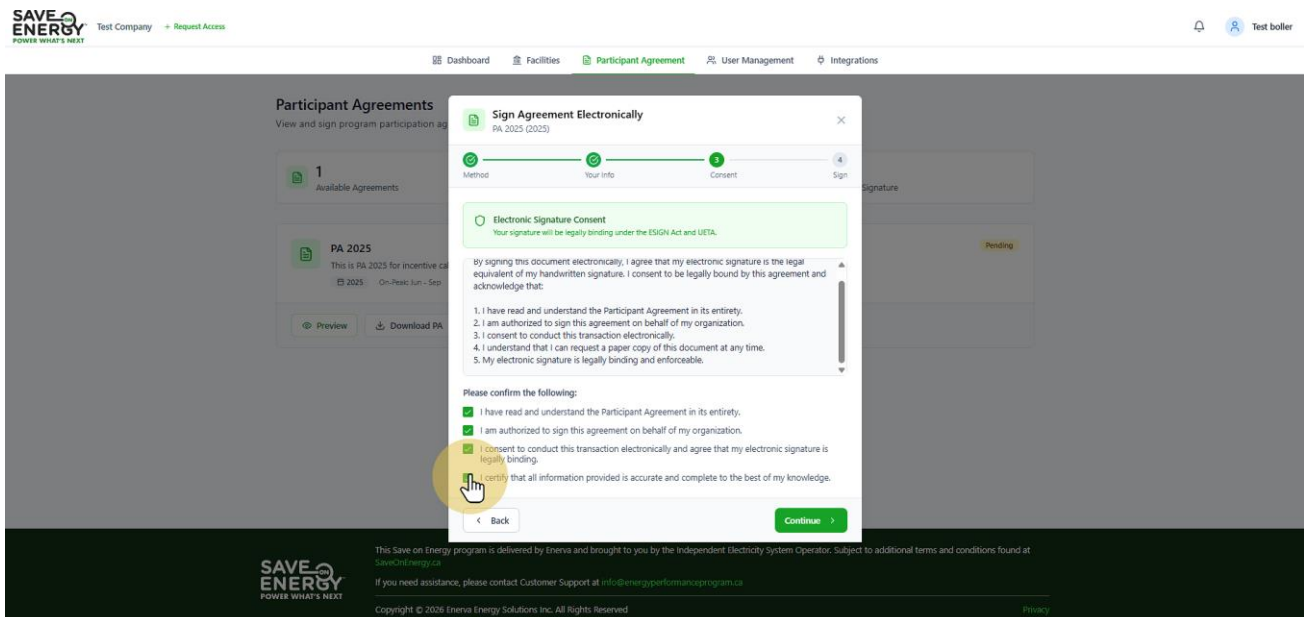
- Consent towards Participant Agreement

Proceed to continue to consent towards signing the Participant agreement



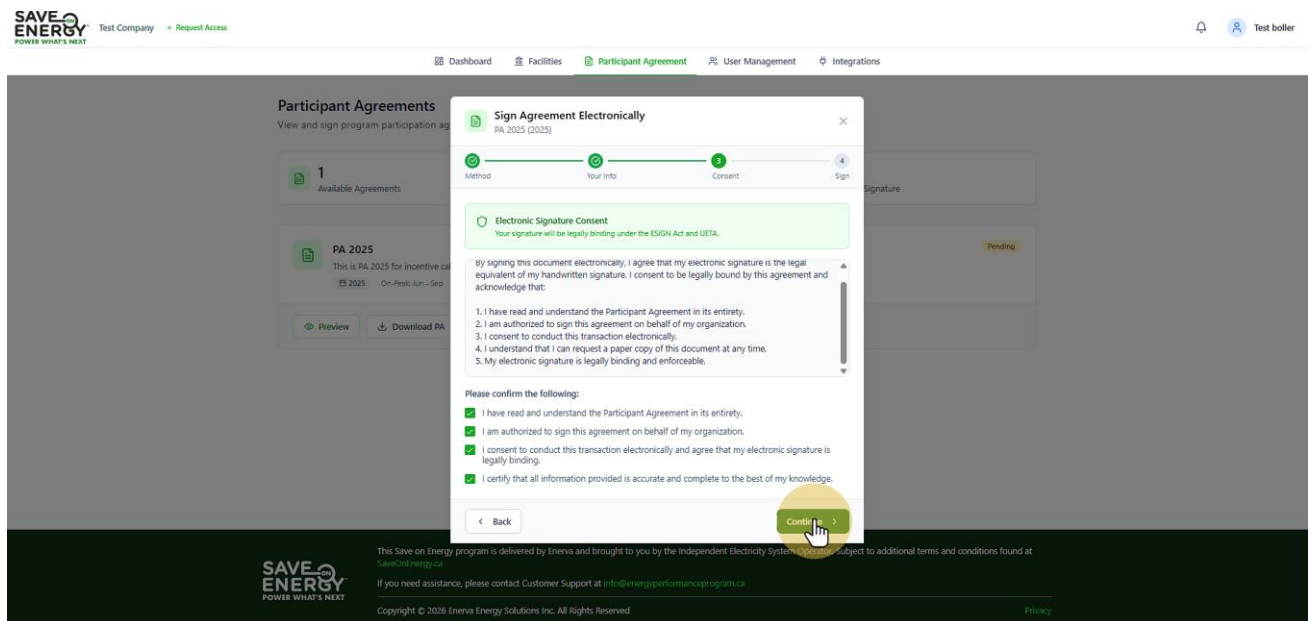
- Confirm Electronic Signature Consent

Review the **Electronic Signature Consent** section and select the checkbox to confirm that you have read and understood the Participant Agreement, are authorized to sign on behalf of your organization, and that all information provided is accurate and complete.



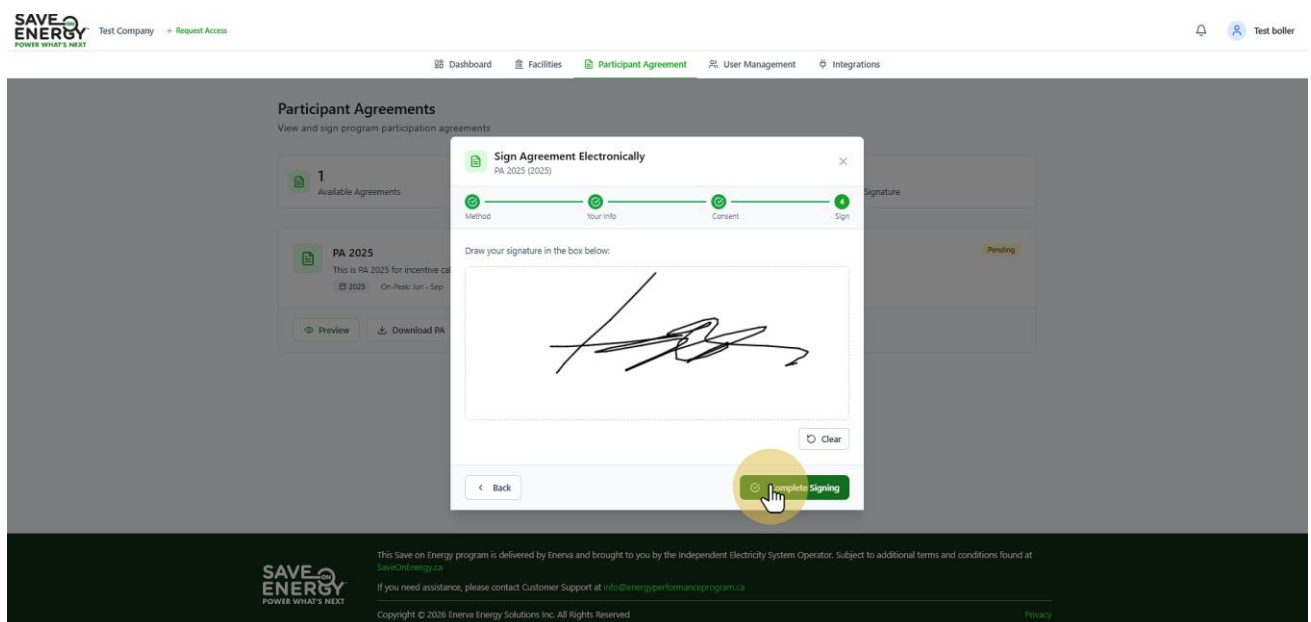
- Proceed to signing the Participant Agreement

Proceed to the Signature step to sign the Participant Agreement



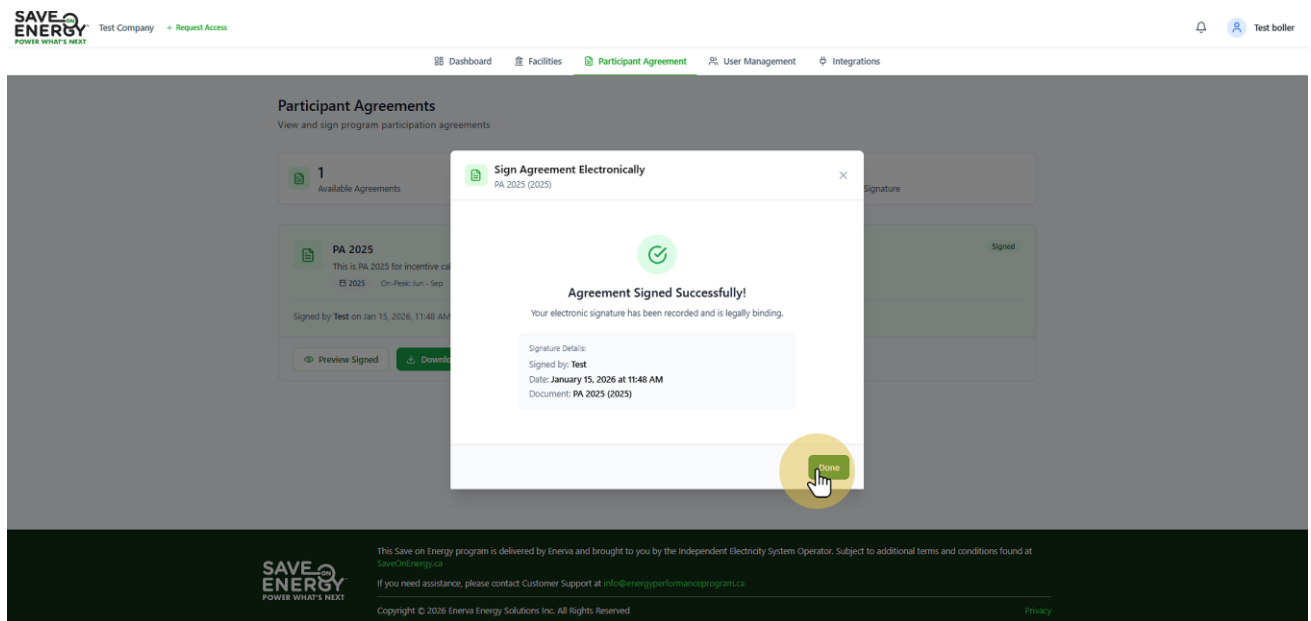
- Complete the Participant Agreement Signing

After drawing or applying your signature in the signature box, click **Complete Signing** to finalize the Participant Agreement.



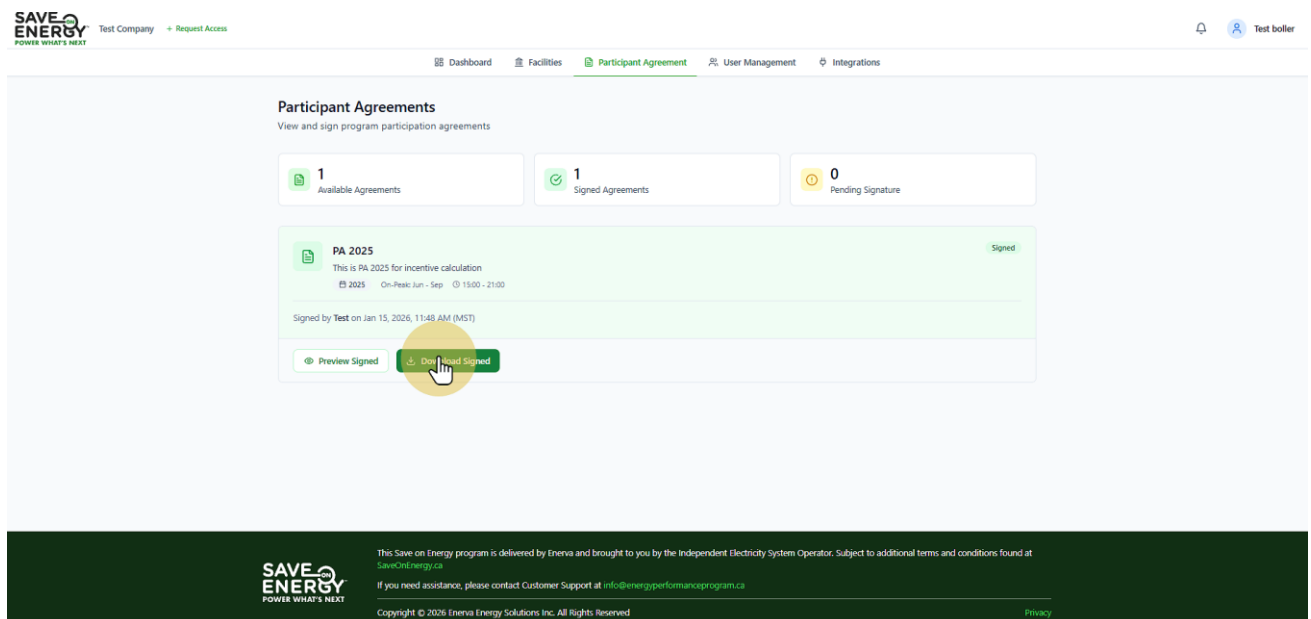
- Confirm Agreement Completion

After seeing the **Agreement Signed Successfully** confirmation, click **Done** to close the signing window and return to the **Participant Agreements** page.



- Download the signed Participant Agreement

Click **Download Signed** to download a copy of the fully executed Participant Agreement to your device for record-keeping and compliance purposes.



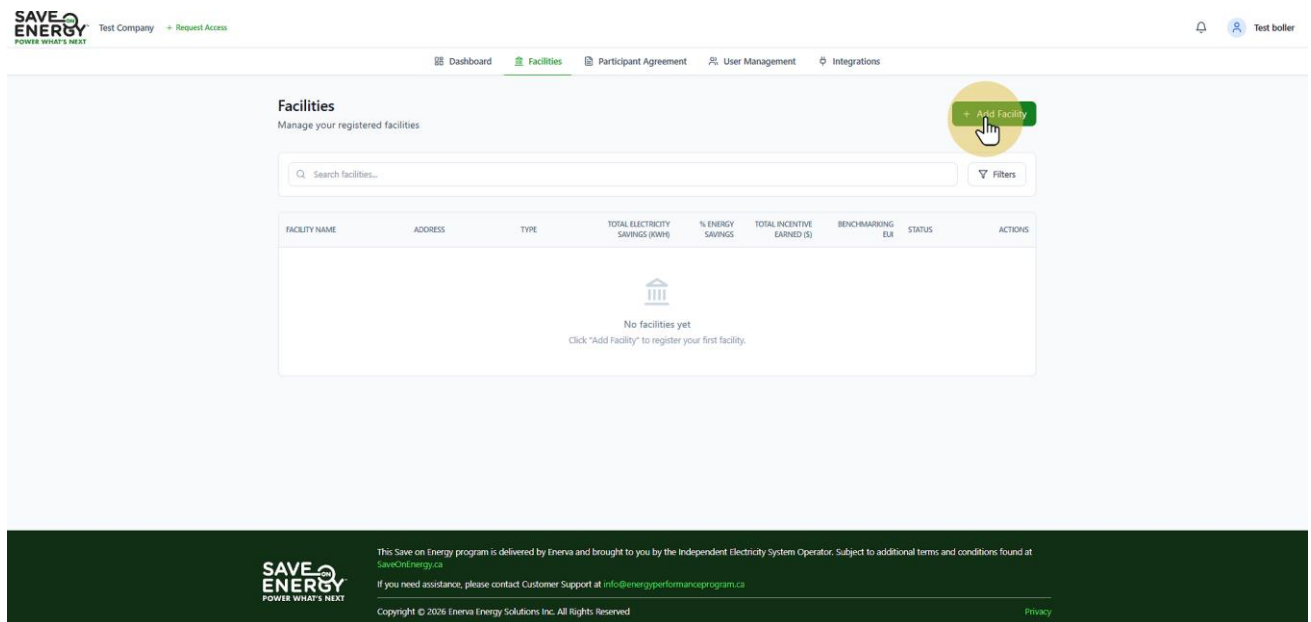
4. Adding Facilities

First to start your application, you need to create a facility:

Proceed to the facility tab and click on the Add Facility button.

4.1 Create a New Facility

After successfully signing the Participant Agreement (PA), facility creation becomes available and you can proceed to **add a facility**.



4.2 Enter your Facility details

Proceed to entering your facility details such as facility name, facility category, facility type, Participant agreement, target energy savings

← Back to Facilities

Add Facility

Register a new facility for energy performance tracking

1 Facility Details

Facility Construction Status *

Existing Building

Note: EPP program requires "Existing Building" in Ontario, Canada

Facility Nickname (Optional)

Friendly name for display

Facility Type *

Select type...

Participant Agreement *

Select Participant Agreement

Once assigned, the PA cannot be changed for this facility

Facility Photo (Optional)

Click to upload or drag and drop
PNG, JPG up to 5MB

Facility Name *

Enter facility name

Facility Category *

Select category...

NAICS Code *

Auto-populated

Target Energy Savings (%) *

Minimum 5% electricity savings required by end of PAP Period 2

5%

4.3 Add the Facility

Click Add Facility to save the entered details and register the facility in the system. Once added, the facility will appear in your facilities list and be available for energy performance tracking

SAVE ON ENERGY Test Company + Request Access

Dashboard Facilities Participant Agreement User Management Integrations

Property Definition

Worship Facility refers to buildings that are used as places of worship. This includes churches, temples, mosques, synagogues, meetinghouses, or any other buildings that primarily function as a place of religious worship. Gross Floor Area should include all space within the building(s), including but not limited to the primary worship area, community rooms, classrooms, kitchens/food preparation areas, and supporting areas such as restrooms, storage areas, hallways, and elevator shafts. The ENERGY STAR score for Worship Facilities applies to buildings that function as the primary place of worship and not to other buildings that may be associated with a religious organization, such as living quarters, schools, or buildings used primarily for other community activities. To receive an ENERGY STAR score, a Worship facility must have at least 25 seats, but cannot have more than 4,000.

Address

Street Name *
Queens Street

Street Number *
100

Unit Number (Optional)
Unit, Suite, or Apartment #

City *
Toronto

Province *
Ontario

Country *
Canada

Postal Code *
A1A1A1

Cancel Add Facility

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5. Facility Data Entry

Upon successfully creating the facility, the **Facility Details** page is displayed. From here, you can begin adding detailed information about the facility, including building characteristics, HVAC systems, and operational details. Completing these sections is required to move the facility setup forward.

SAVE ON ENERGY Test Company + Request Access

Dashboard Facilities Participant Agreement User Management Integrations

← Back to Facilities

Facility Kosy Draft 0% Edit ...

Summary Details Energy & Water Weather & PM Baseline Performance Savings Plan

Facility Details Pending

Building characteristics, HVAC systems, and operational details

Characteristics Heating & Cooling Operations

Add Characteristics

No Characteristics Added

Add building characteristics to complete this step.

Add Characteristics

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5.1 Enter Building Characteristics

Enter the required building details such as annual operational hours, floor area, year of construction, and electrical information. Once all required fields are completed, save the information to update the facility details.

SAVE ENERGY Test Company → Request Access

Dashboard Facilities Participant Agreement User Management Integrations

← Back to Facilities

Facility Kosy Draft 0/6 Edit

Summary Details Energy & Water Weather & PV Baseline Performance Savings Plan

Facility Details Pending

Building characteristics, HVAC systems, and operational details

Characteristics Heating & Cooling Operations

Edit Building Characteristics X Cancel Save

Building Information

Annual Operational Hours * Year of Construction *

Gross Floor Area (Sq ft) * Number of Storeys *

Conditioned Gross Floor Area (Sq ft) Unconditioned Gross Floor Area (Sq ft)

Electrical Service

Facility Electricity Service Size (Amps) Facility Service Entrance Voltage

5.2 Save Building Characteristics

After entering all required building characteristics, save the information to apply the updates to the facility details and continue with the setup process.

SAVE ENERGY Test Company → Request Access

Dashboard Facilities Participant Agreement User Management Integrations

← Back to Facilities

Facility Kosy Draft 0/6 Edit

Summary Details Energy & Water Weather & PV Baseline Performance Savings Plan

Facility Details Pending

Building characteristics, HVAC systems, and operational details

Characteristics Heating & Cooling Operations

Edit Building Characteristics X Cancel Save

Building Information

Annual Operational Hours * Year of Construction *

Gross Floor Area (Sq ft) * Number of Storeys *

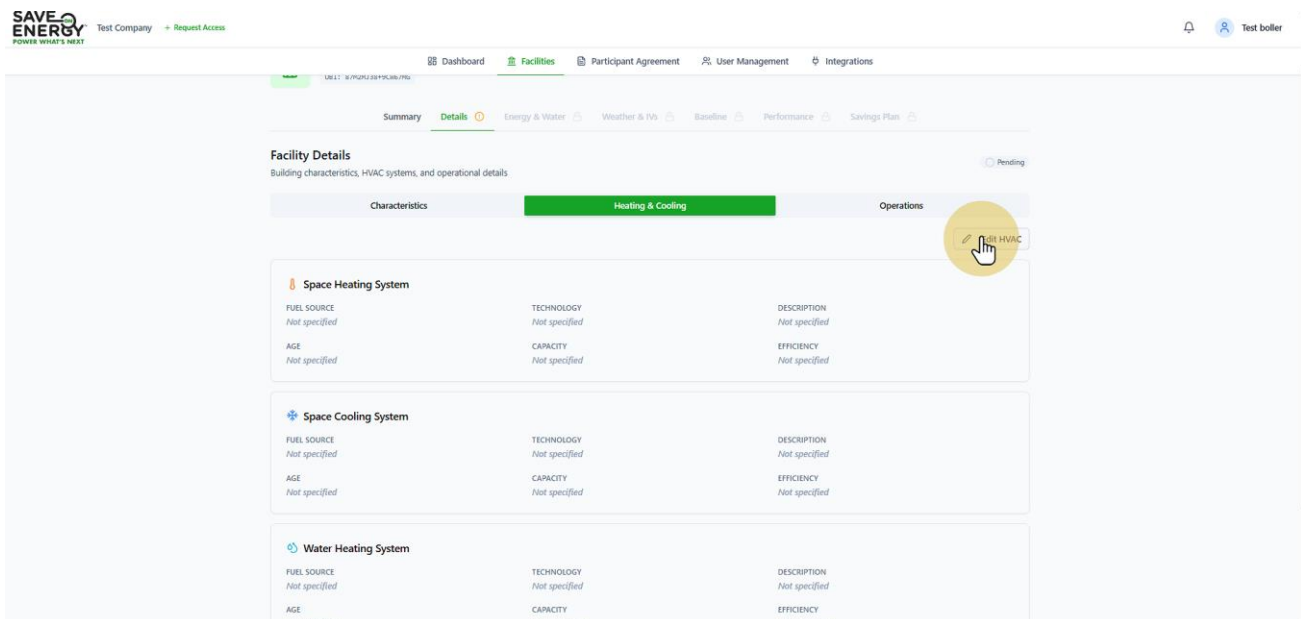
Conditioned Gross Floor Area (Sq ft) Unconditioned Gross Floor Area (Sq ft)

Electrical Service

Facility Electricity Service Size (Amps) Facility Service Entrance Voltage

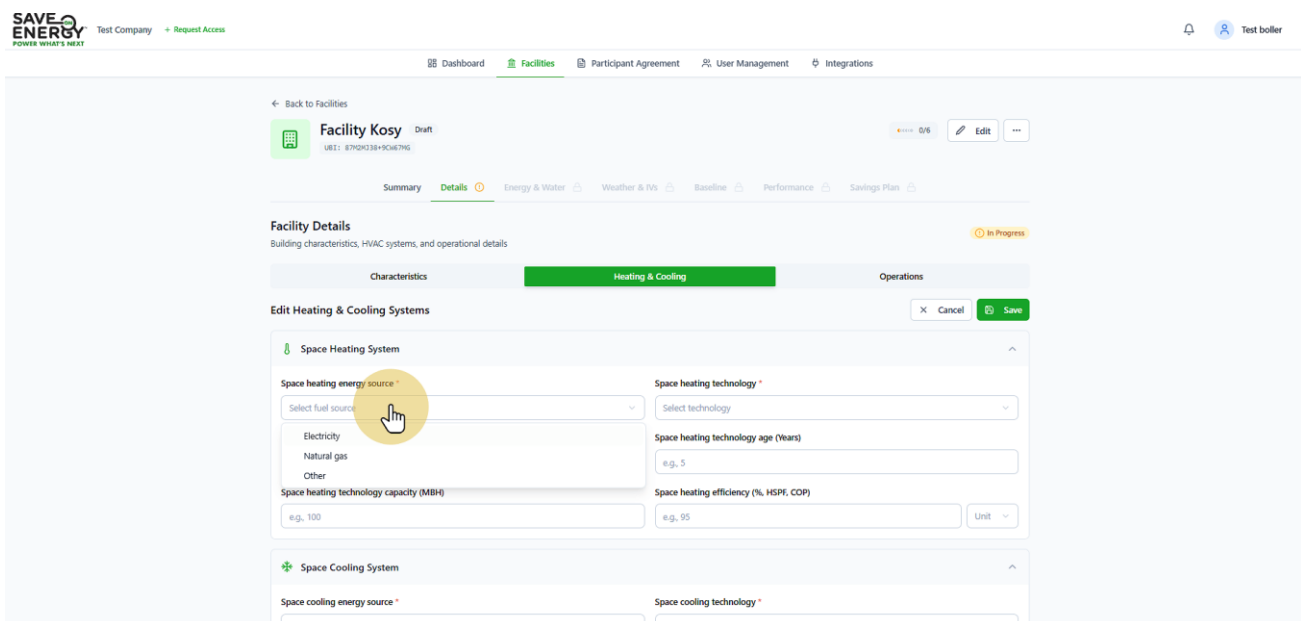
5.3 Edit Heating & Cooling Details

Use the **Heating & Cooling** section to edit and enter HVAC system information for the facility, including space heating, cooling, and water heating system details.



5.4 Enter Heating & Cooling System Details

Provide detailed information for the facility's heating and cooling systems, including energy source, technology type, system age, capacity, and efficiency.



5.5 Save Heating & Cooling System Details

After entering all required heating and cooling system information, save the details to update the facility's HVAC profile and continue progressing through the facility setup.

SAVE ENERGY POWER WHAT'S NEXT

Test Company Request Access

Dashboard Facilities Participant Agreement User Management Integrations

Back to Facilities

Facility Kosy Draft 0/6 Edit

Summary Details Energy & Water Weather & PVs Baseline Performance Savings Plan

Facility Details Building characteristics, HVAC systems, and operational details In Progress

Characteristics Heating & Cooling Operations

Edit Heating & Cooling Systems X Cancel Save

Space Heating System

Space heating energy source * Electricity

Space heating technology * Boiler

Space heating technology description Test

Space heating technology age (Years) 5

Space heating technology capacity (MBH) 100

Space heating efficiency (% HSPF, COP) 89 Unit

Space Cooling System

Space cooling energy source * Electricity

Space cooling technology * Rooftop unit

5.6 Operations Details

Use the **Operations** section to enter and review operational information for the facility, such as occupancy details and heating and cooling control settings.

SAVE ENERGY POWER WHAT'S NEXT

Test Company Request Access

Dashboard Facilities Participant Agreement User Management Integrations

Back to Facilities

Facility Kosy Draft 0/6 Edit

Summary Details Energy & Water Weather & PVs Baseline Performance Savings Plan

Facility Details Building characteristics, HVAC systems, and operational details Completed

Characteristics Heating & Cooling Operations

Edit Operations

Occupancy

MAXIMUM OCCUPANTS Not specified

AVERAGE OCCUPANTS Not specified

OCCUPANCY PATTERN Not specified

Occupancy Controls

Lighting Control Lights automatically adjust based on occupancy No

Heating Control Heating adjusts based on occupancy No

Cooling Control Cooling adjusts based on occupancy No

Success HVAC details saved successfully

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5.7 Save Operational Details

After entering the required operational information, save the details to apply the updates and complete the Operations section for the facility.

SAVE ENERGY POWER WHAT'S NEXT

Test Company Request Access

Dashboard Facilities Participant Agreement User Management Integrations

Back to Facilities

Facility Kosy Draft 0/6 Edit

Summary Details Energy & Water Weather & PV Baseline Performance Savings Plan

Facility Details Building characteristics, HVAC systems, and operational details Completed

Characteristics Heating & Cooling Operations

Edit Operations Details X Cancel Save

Occupancy

Maximum Number of Occupants 400 Average Number of Occupants 234

Occupancy Pattern Year round

Occupancy Controls

Lighting Controlled for Occupancy Lights automatically adjust based on occupancy

Space Heating Controlled for Occupancy Heating adjusts based on occupancy

Space Cooling Controlled for Occupancy Cooling adjusts based on occupancy

6. Energy & Water Meter

After completing the facility details, navigate to the **Energy & Water** section to begin configuring meters for the facility.

SAVE ENERGY POWER WHAT'S NEXT

Test Company Request Access

Dashboard Facilities Participant Agreement User Management Integrations

Back to Facilities

Facility Kosy Draft 1/6 Edit

Summary Details Energy & Water Weather & PV Baseline Performance Savings Plan

Energy & Water Meter configuration and consumption data Pending

ACTIVE METERS 0 ELECTRICITY METERS 0 NATURAL GAS METERS 0 WATER METERS 0

Configured Meters

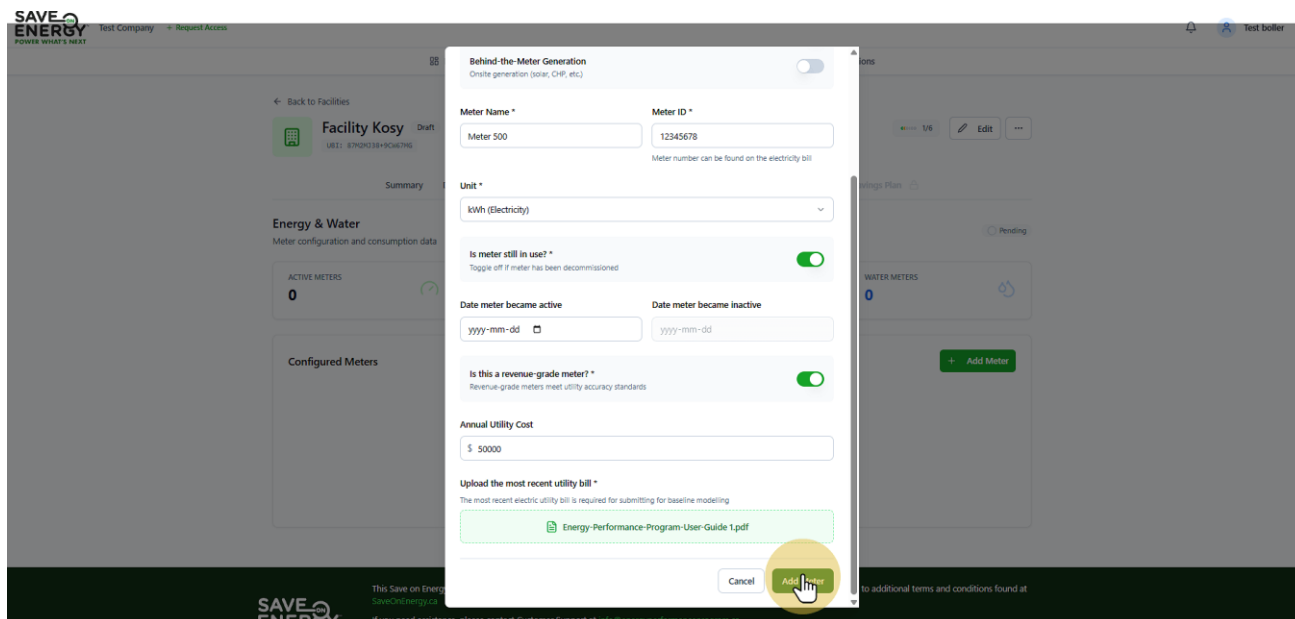
No meters configured yet Add electricity, gas, or water meters for this facility

Add Meter

SAVE ENERGY This Save on Energy program is delivered by Enerva and brought to you by the Independent Electricity System Operator. Subject to additional terms and conditions found at [saveonenergy.ca](https://www.saveonenergy.ca). If you need assistance, please contact Customer Support at info@energyperformanceprograms.ca.

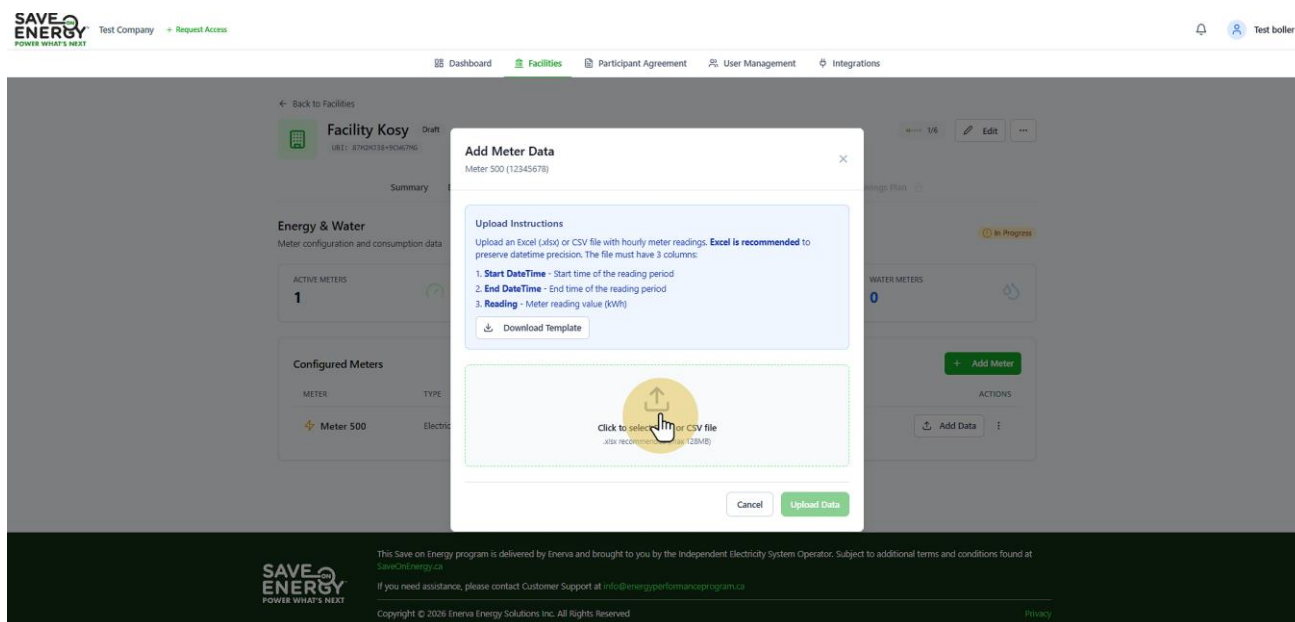
6.1 Add Energy & Water Meter

Enter the required meter information, including the meter name, meter ID, unit type, activation dates, and utility details. Additionally, upload the most recent utility bill, then save the meter to complete the configuration.



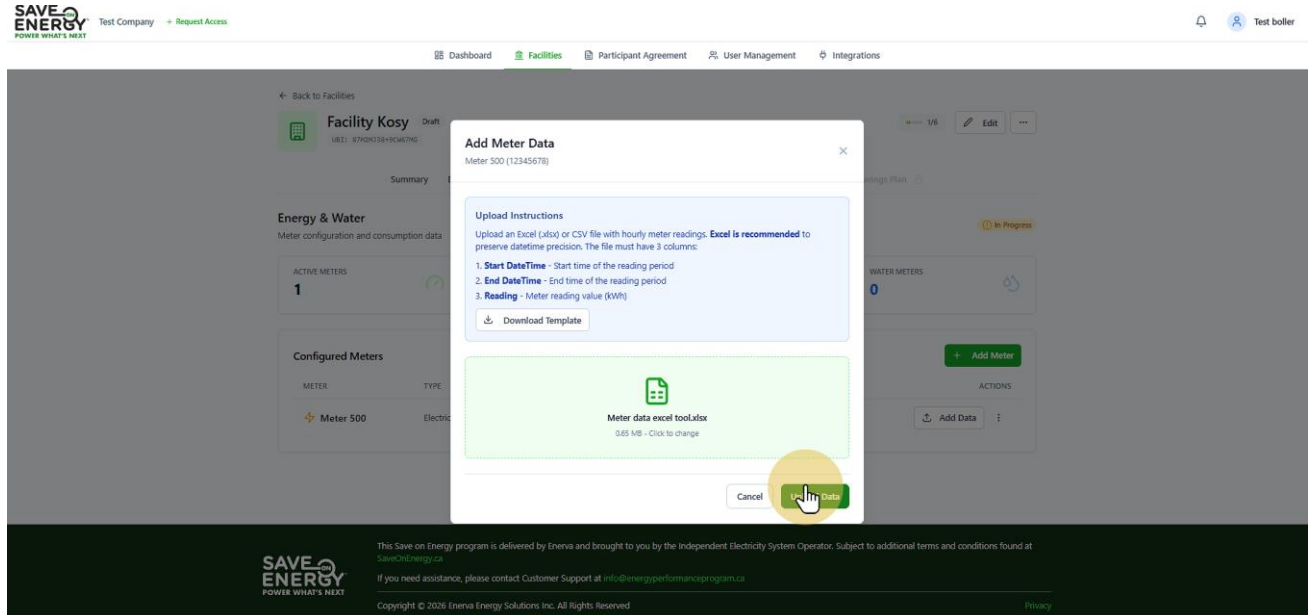
6.2 Add Meter Data

Add consumption data for the selected meter by entering usage values for the applicable date range.



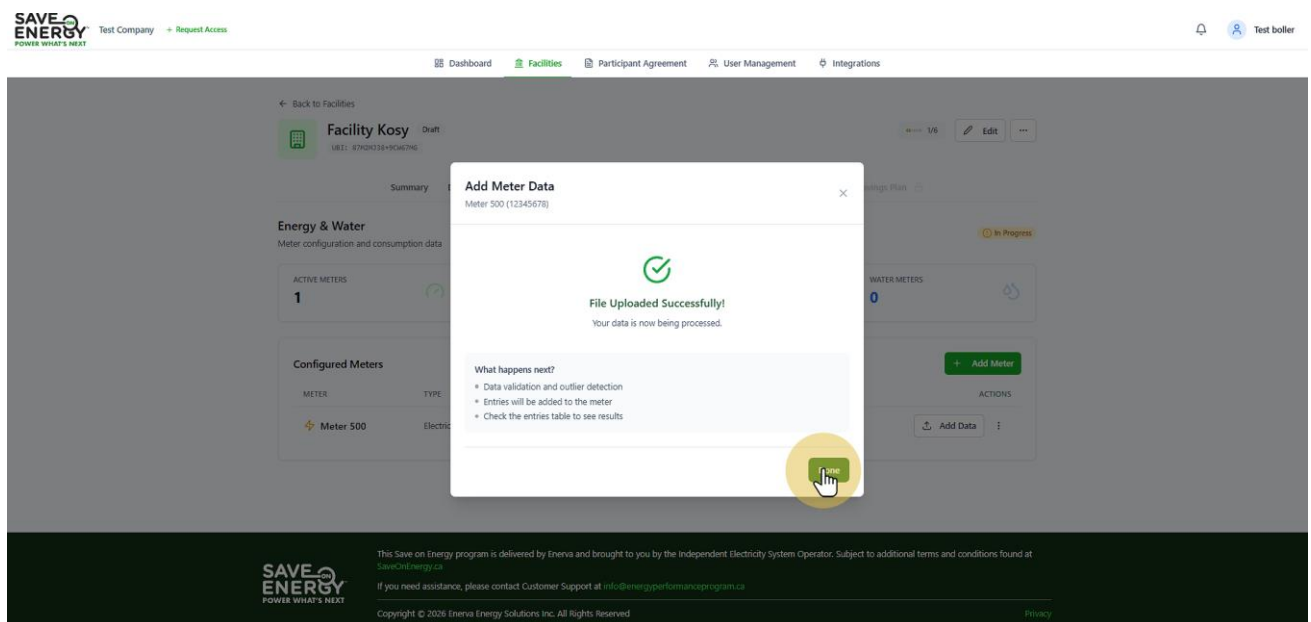
6.3 Upload Meter Data

Upload meter consumption data using the provided Excel or CSV template. Ensure the file includes the required start date, end date, and meter reading values to enable accurate baseline modeling and energy performance analysis.



6.4 Process Meter Data

Your meter data has been successfully uploaded and is now being processed. The system will validate the data, detect any outliers, and add the entries to the meter. You can review the results in the meter entries table once processing is complete.



6.5 Meter Actions Menu

Use the actions menu to manage the selected meter. From here, you can add consumption data, edit meter details, view meter entries, review uploaded utility bills, or delete the meter if it is no longer needed.

The screenshot shows the 'Facility Kosy' page in the 'Energy & Water' tab. The 'Configured Meters' table has the following data:

METER	TYPE	METER ID	DATA ENTRIES	DATE RANGE	STATUS	ACTIONS
Meter 500	Electricity	12345678	0 entries	-	Active	- Add Data - Edit Meter - View Entries - View Utility Bill - Delete Meter

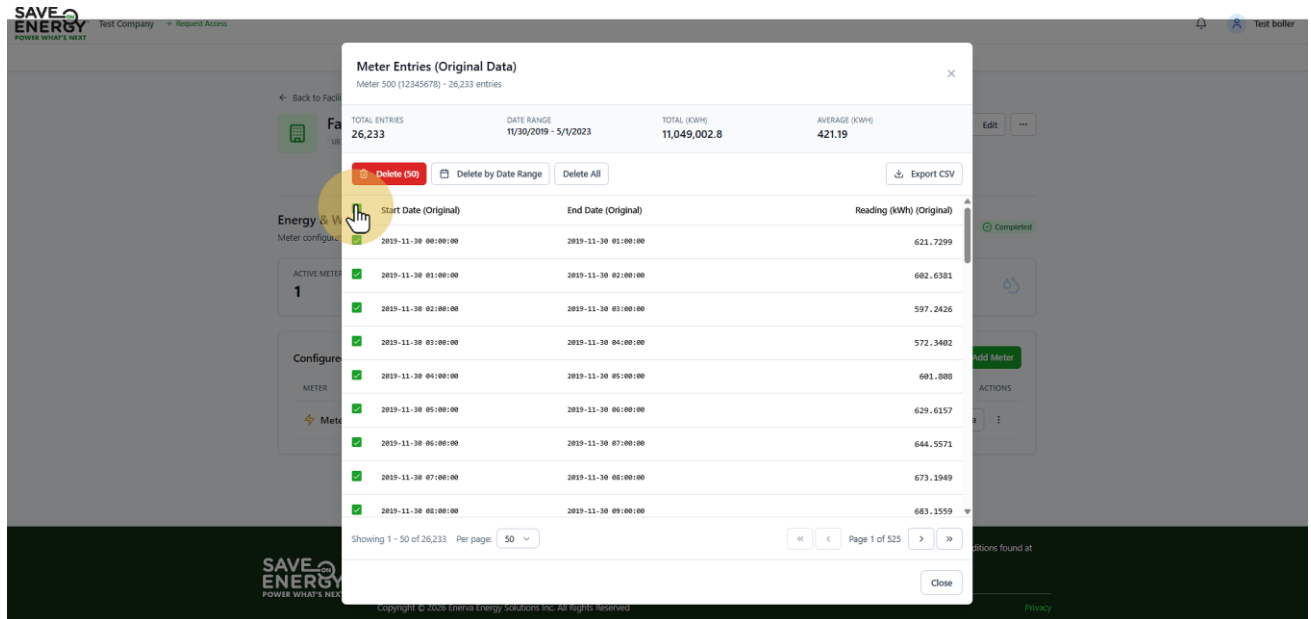
6.6 View Meter Entries

Open the meter entries view to see all uploaded consumption data for this meter, including date ranges, values, and processing status.

The screenshot shows the 'Facility Kosy' page in the 'Energy & Water' tab. The 'Configured Meters' table has the following data:

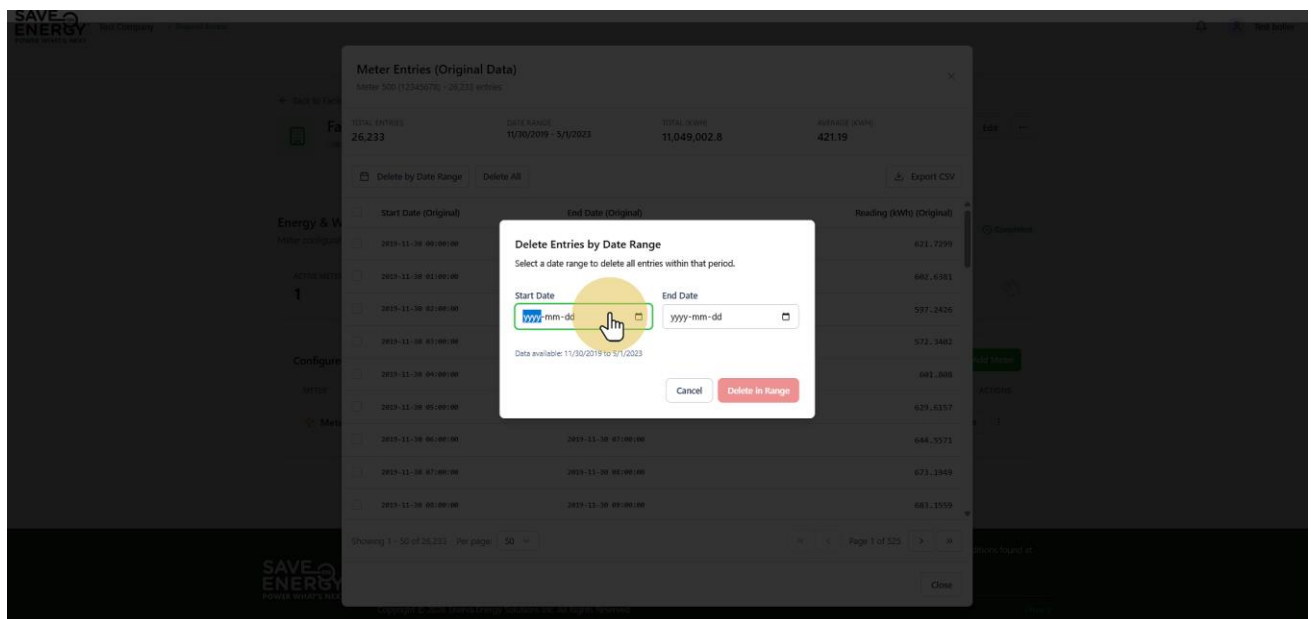
METER	TYPE	METER ID	DATA ENTRIES	DATE RANGE	STATUS	ACTIONS
Meter 500	Electricity	12345678	0 entries	-	Active	- Add Data - Edit Meter - View Entries - View Utility Bill - Delete Meter

Review the full list of uploaded meter readings, including original start and end times, consumption values (kWh), and summary statistics such as total entries, date range, and average usage. From this view, you can export data, delete selected entries, or manage records by date range.



6.7 Delete Entries by Date Range

Select a start and end date to permanently remove all meter entries recorded within the specified period.



7. Weather & Independent Variables

7.1 Select a Weather Station

Choose a nearby weather station from the list to associate weather data with your facility. The selected station will be used for baseline modeling and ongoing weather analysis.

Weather & Independent Variables
Weather station configuration and independent variable data

Weather Stations

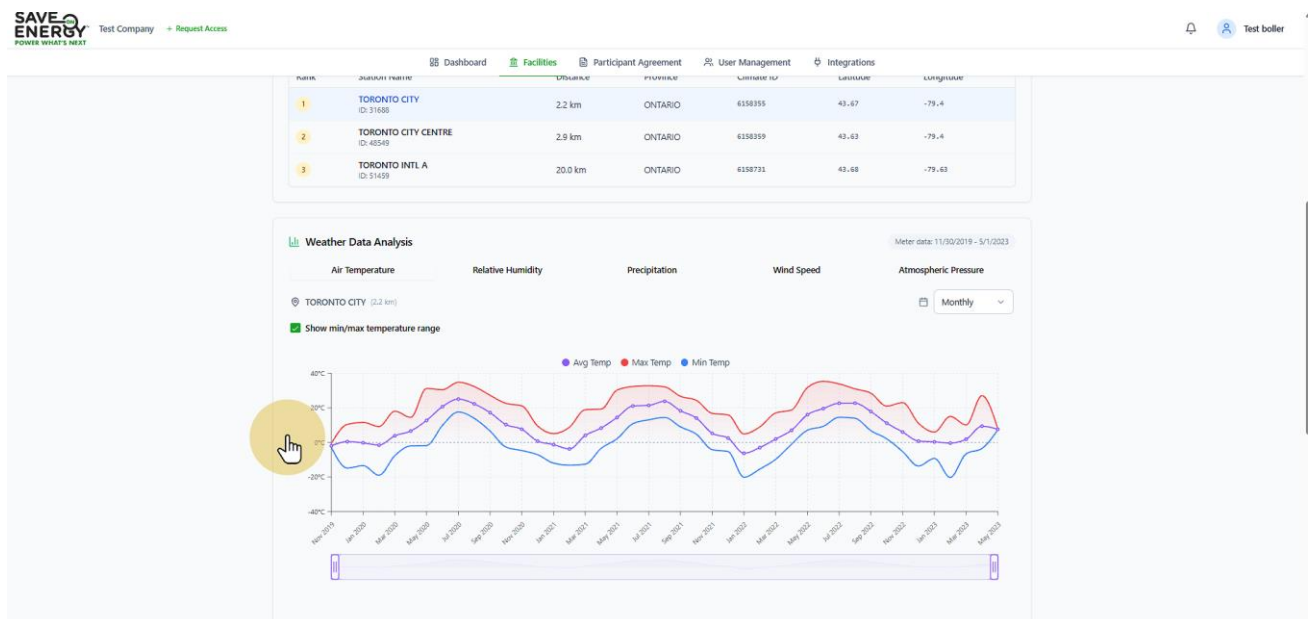
Refresh

Nearest Weather Stations
Click a station to view its weather data in the chart below

Rank	Station Name	Distance	Province	Climate ID	Latitude	Longitude
1	TORONTO CITY ID: 31688	2.2 km	ONTARIO	6158355	43.67	-79.4
2	TORONTO CITY CENTRE ID: 45549	2.9 km	ONTARIO	6158359	43.63	-79.4
3	TORONTO INTL A ID: 51459	20.0 km	ONTARIO	6158731	43.68	-79.63

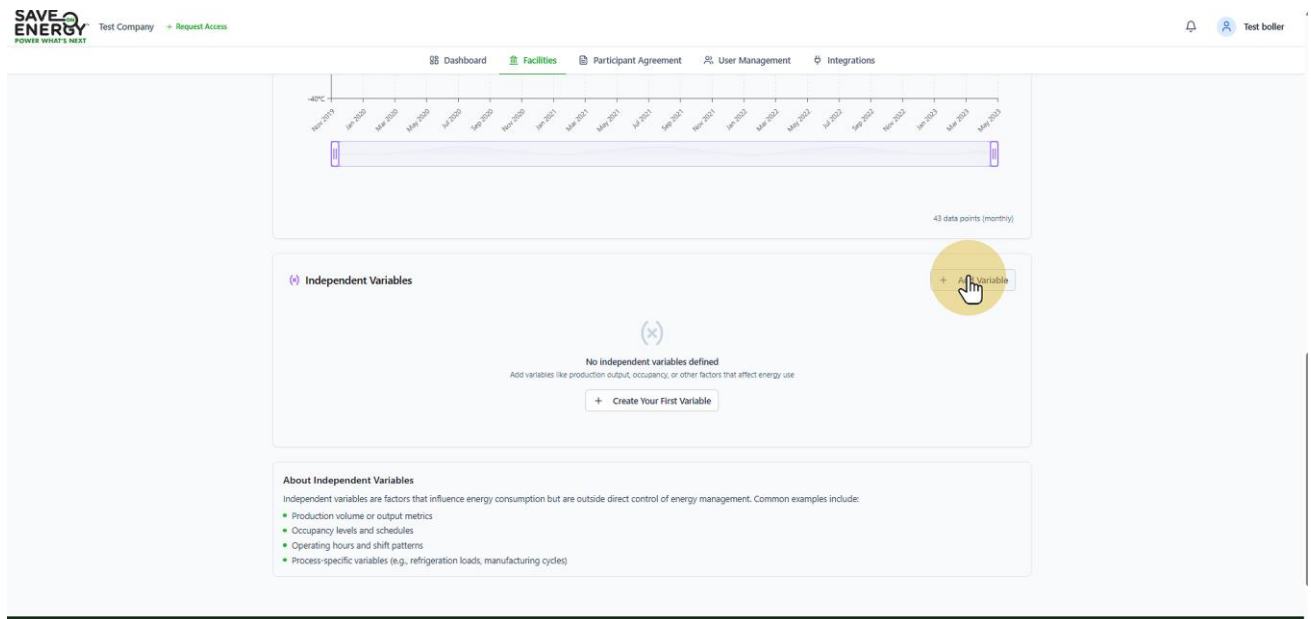
Weather Data Analysis
Meter data: 11/30/2019 - 5/1/2023

Air Temperature Relative Humidity Precipitation Wind Speed Atmospheric Pressure



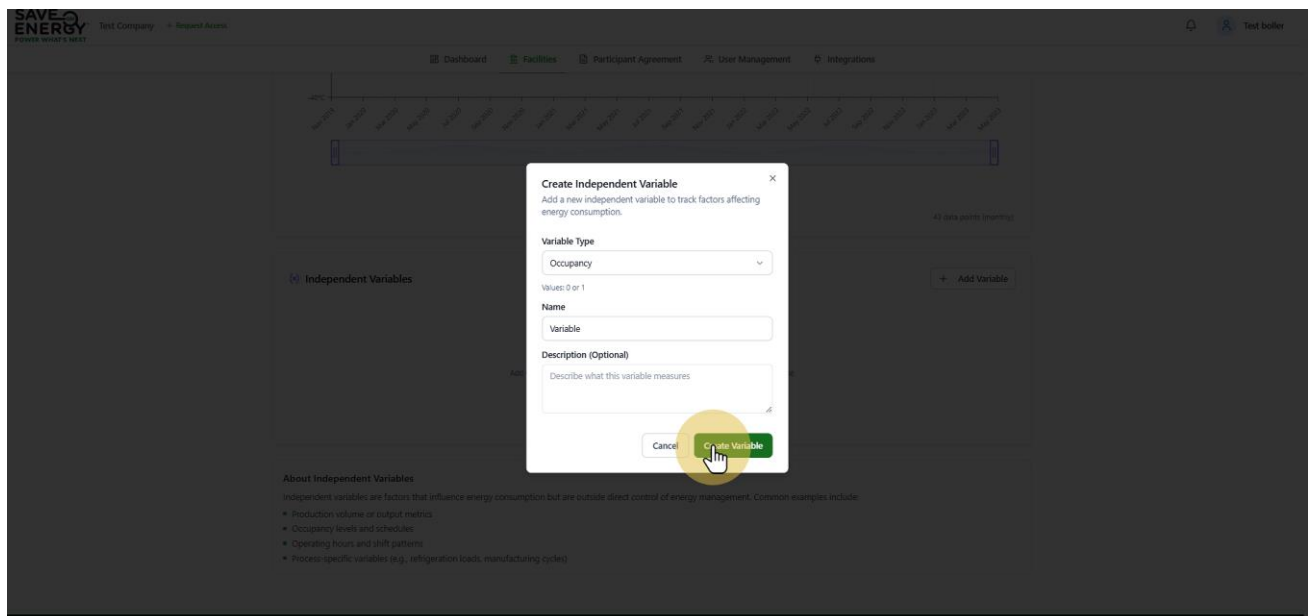
7.3 Add an Independent Variable

Add independent variables that impact energy use, such as occupancy or production levels, to support more accurate energy analysis and modeling.



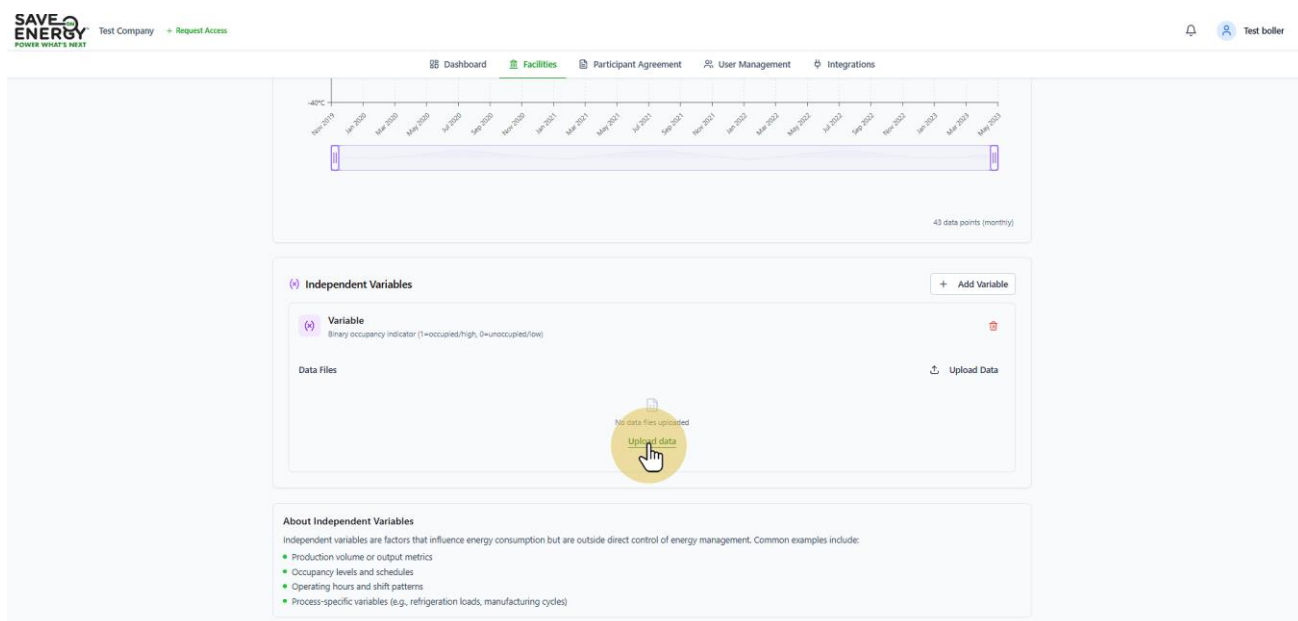
7.4 Create Independent variable

Select the variable type, enter a name, and optionally add a description to define what this independent variable represents. Once complete, create the variable to add it to the facility's energy analysis.



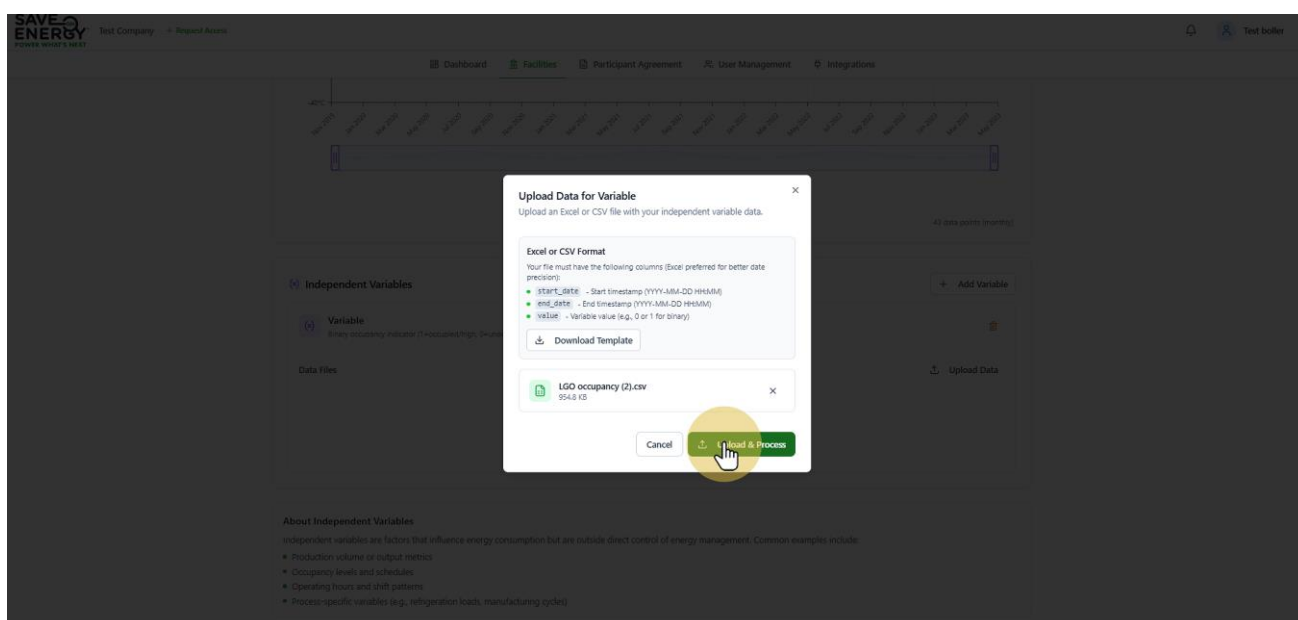
7.5 Upload Independent Variable Data

In the Independent Variables section, upload data files for the selected variable. This data will be used alongside meter and weather data to support baseline modelling and energy analysis.



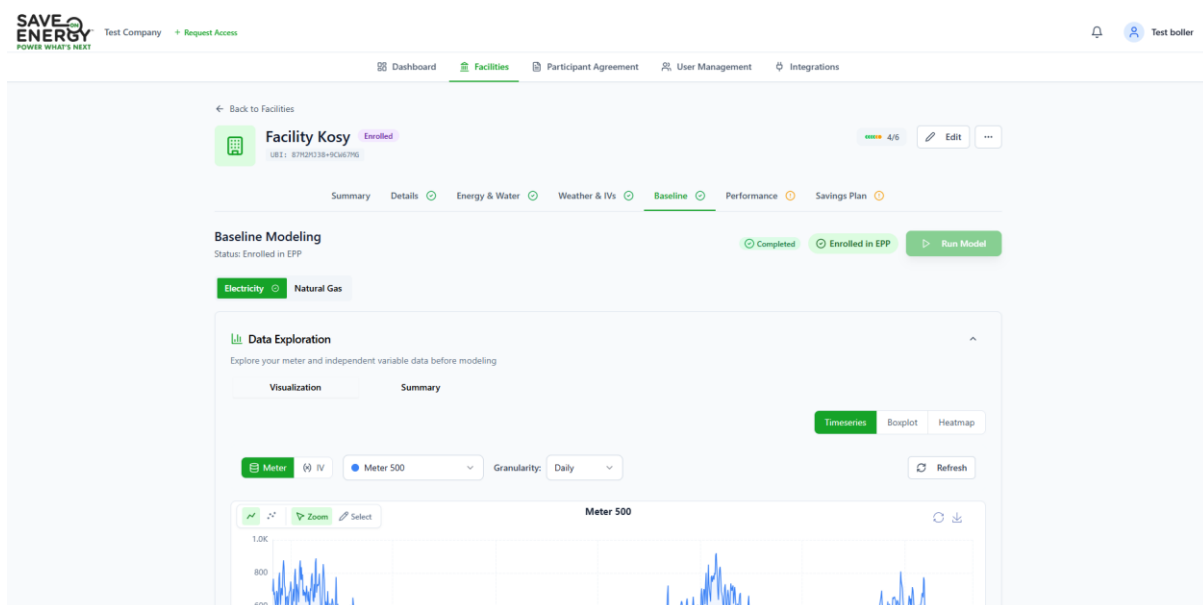
7.6 Upload & Process Independent Variable Data

This modal allows you to upload an Excel or CSV file containing data for the selected independent variable. The system validates the file structure (start date, end date, and value), then processes the data to align it with the facility's meter and weather timelines. Once uploaded, the data becomes available for baseline modelling and energy analysis.



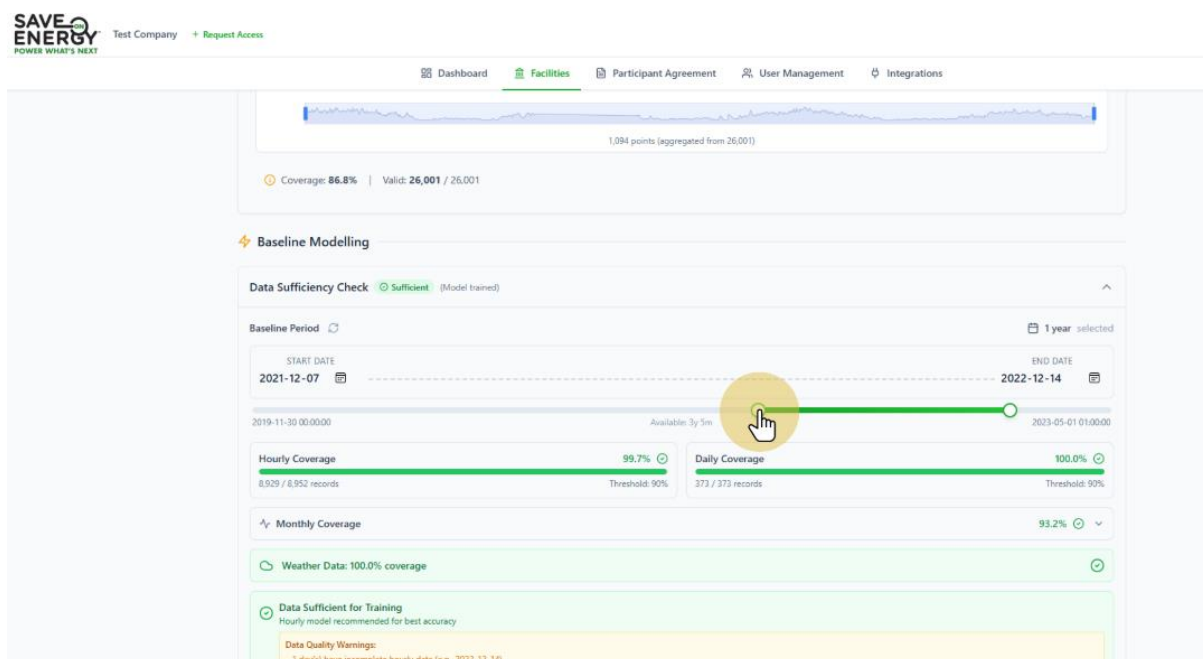
8. Baseline Modelling

Once you have finished filling out the other tabs, you can head over to the Baseline Modelling tab to generate your baseline model.



8.1 Baseline Modelling Slider

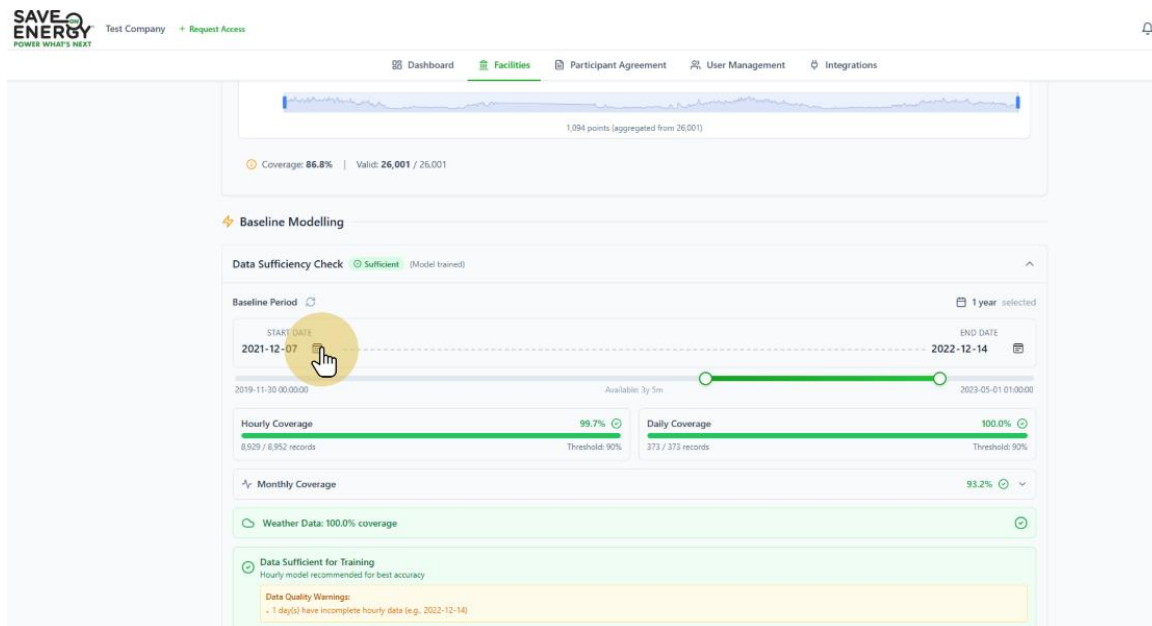
Use the date slider to define the baseline period for your energy model. You can drag the slider handles to adjust the start and end dates or fine-tune them using the date fields above. The selected range determines how much historical data is used to assess data sufficiency and train the baseline model. A minimum of 12 months (365 days) of valid data is required. As you adjust the slider, the system immediately checks whether your selected range meets the data requirements and displays a warning if it does not.



8.2 Manually Adjust Start and End Date & Time

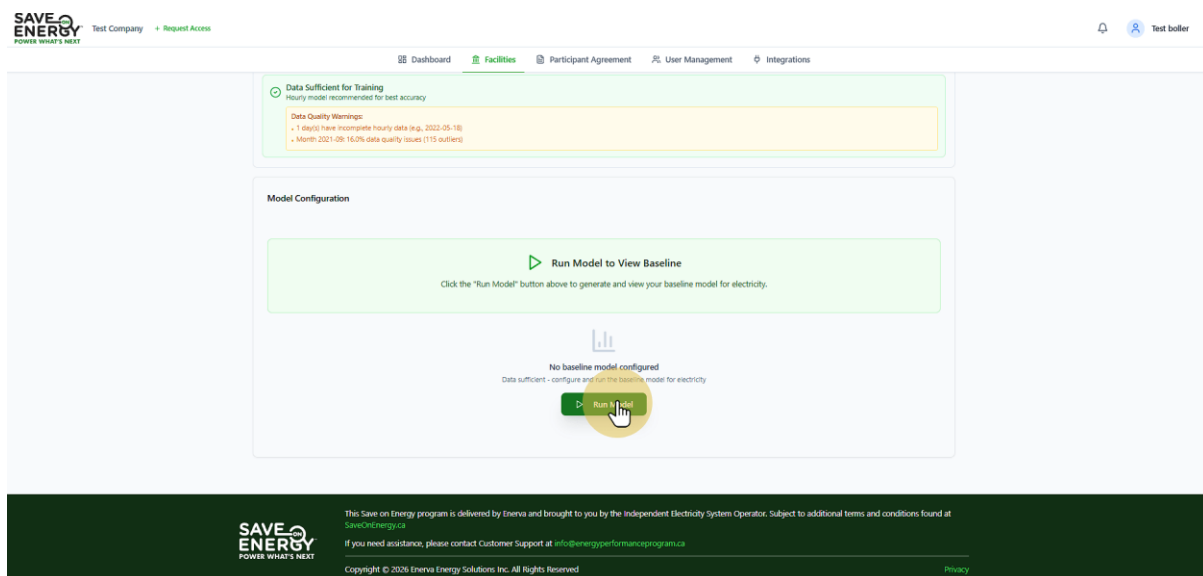
You can manually set the baseline period by entering specific start and end dates and times using the date fields above the slider. This allows precise control over the exact data window used for baseline modelling, rather than relying only on dragging the slider. When you update the dates manually, the system instantly recalculates hourly, daily, and monthly coverage, checks weather data

availability, and confirms whether the selected range meets the data sufficiency thresholds required for model training



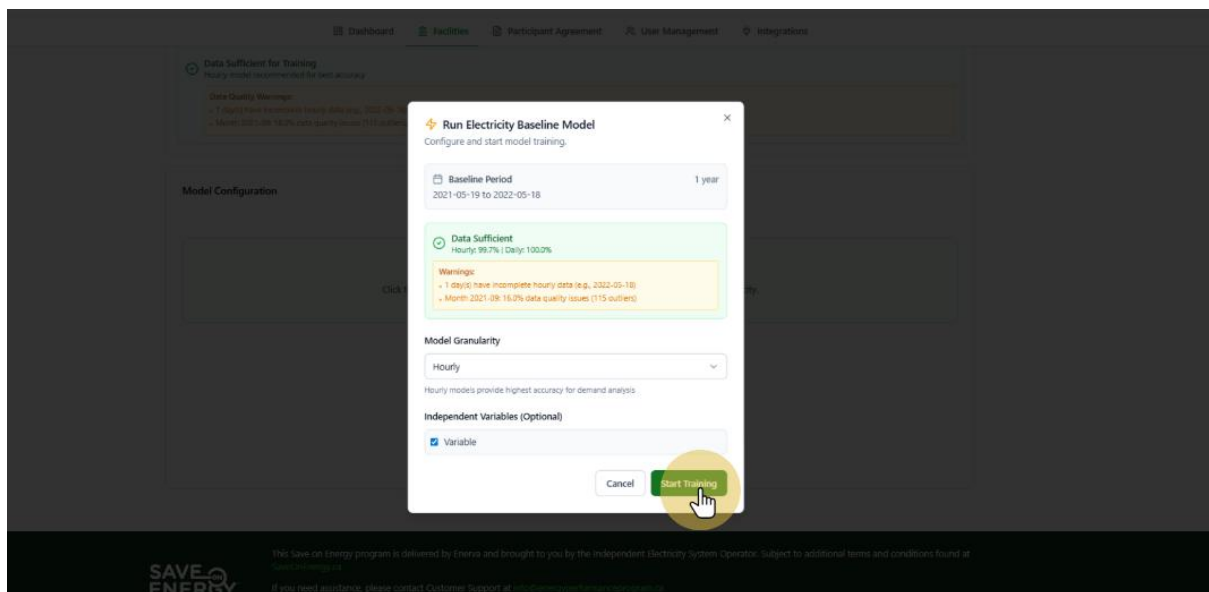
8.3 Run Baseline Model

Click Run Model to start generating the baseline model using the configured baseline period and settings. Until the model is run, the system indicates that no baseline model is configured. After the model is successfully generated, baseline results become available for review



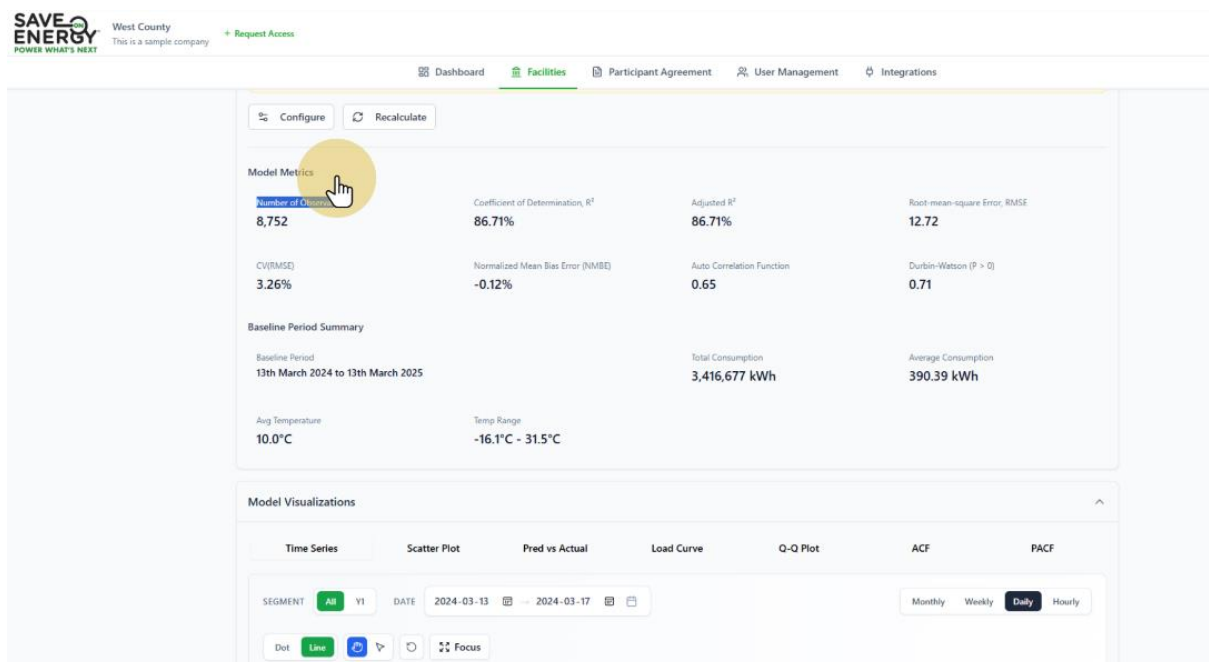
8.4 Configure and Start Baseline Model Training

This modal allows you to configure and start training the electricity baseline model. You can review the selected baseline period, confirm that the data is sufficient for training



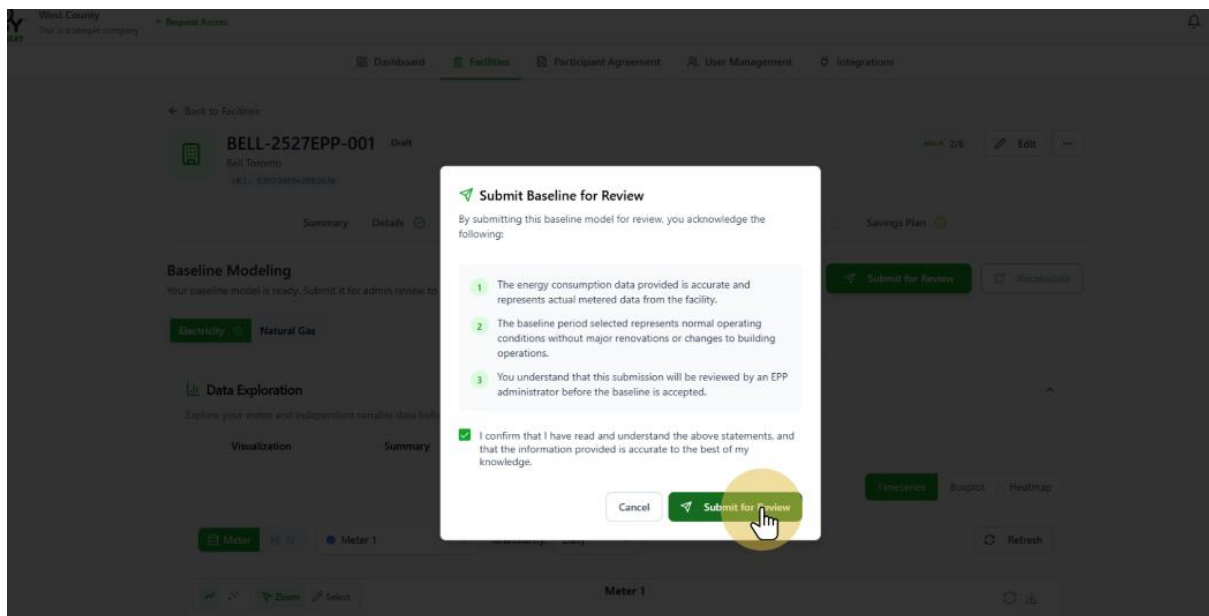
8.5 Baseline Model Results

After the baseline model is run, this section displays the modeling results and performance metrics. You can review key indicators such as the number of observations used, model accuracy (R^2 and Adjusted R^2), error metrics (RMSE, CVMSE, NMBE), and statistical checks like autocorrelation and Durbin–Watson. The baseline period summary shows total and average energy consumption, along with temperature statistics used during modeling.



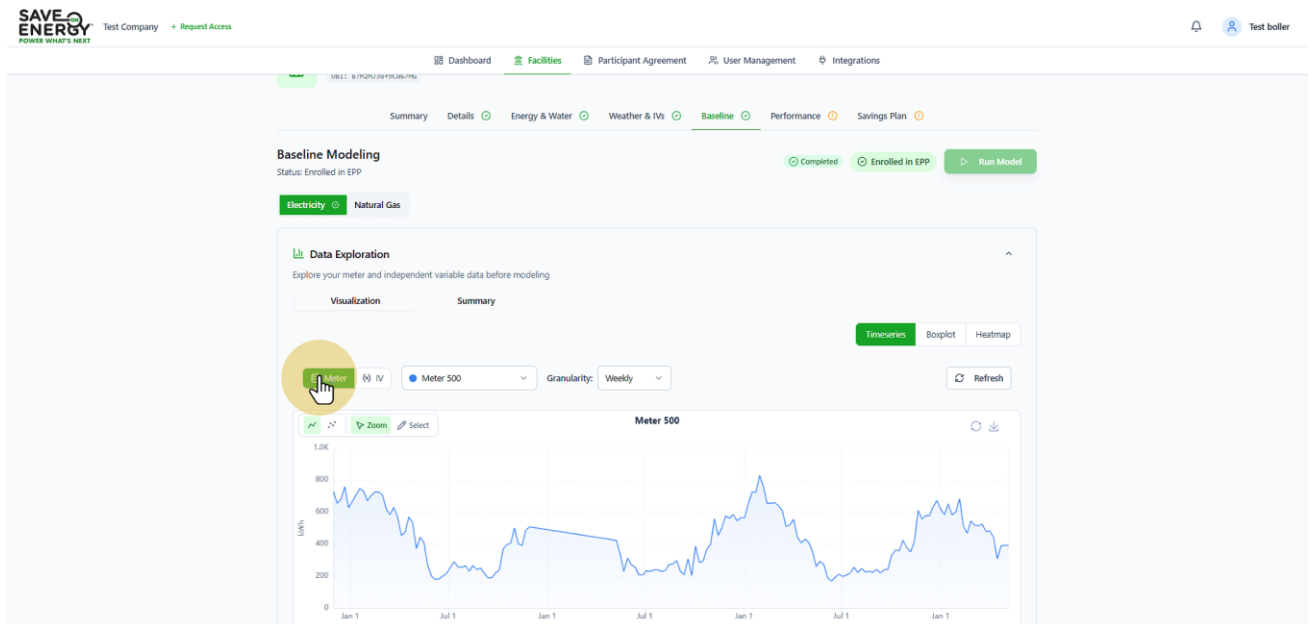
8.6 Submit Baseline Model for Review

Once the baseline model has been successfully generated, you can submit it for admin review using the **Submit for Review** button. This action indicates that your baseline modeling is complete and ready for validation. After submission, the model status changes to **In Progress**, and administrators can review the results before approving the baseline for the next stages, such as performance tracking and savings calculations.



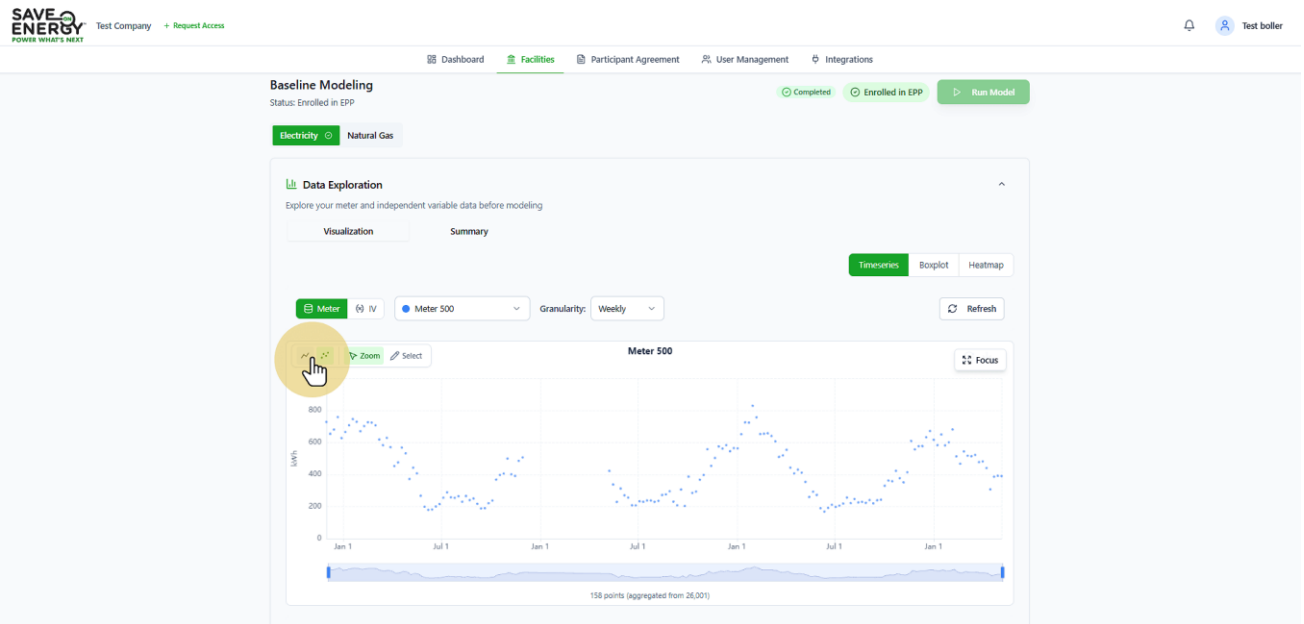
8.7 Meter Data Exploration

This section allows you to explore and validate your meter data before running the baseline model. You can select a specific meter and adjust the time granularity (e.g., weekly, hourly) to visualize consumption trends over time. The interactive chart helps identify patterns, seasonality, anomalies, or data gaps, ensuring the meter data is suitable for accurate baseline modelling.



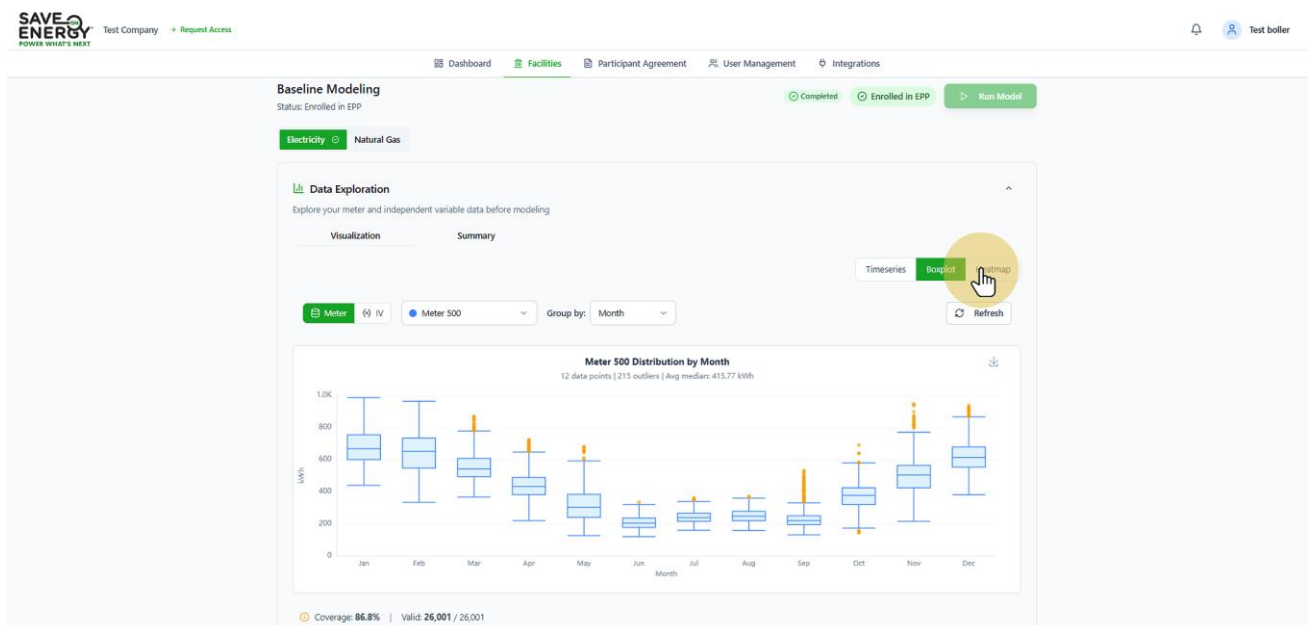
8.8 Independent Variable – Data Exploration

This chart visualizes the selected independent variable over time (for example, occupancy, production level, or operating hours). It allows you to review how the independent variable changes across the selected period and granularity before baseline modeling.



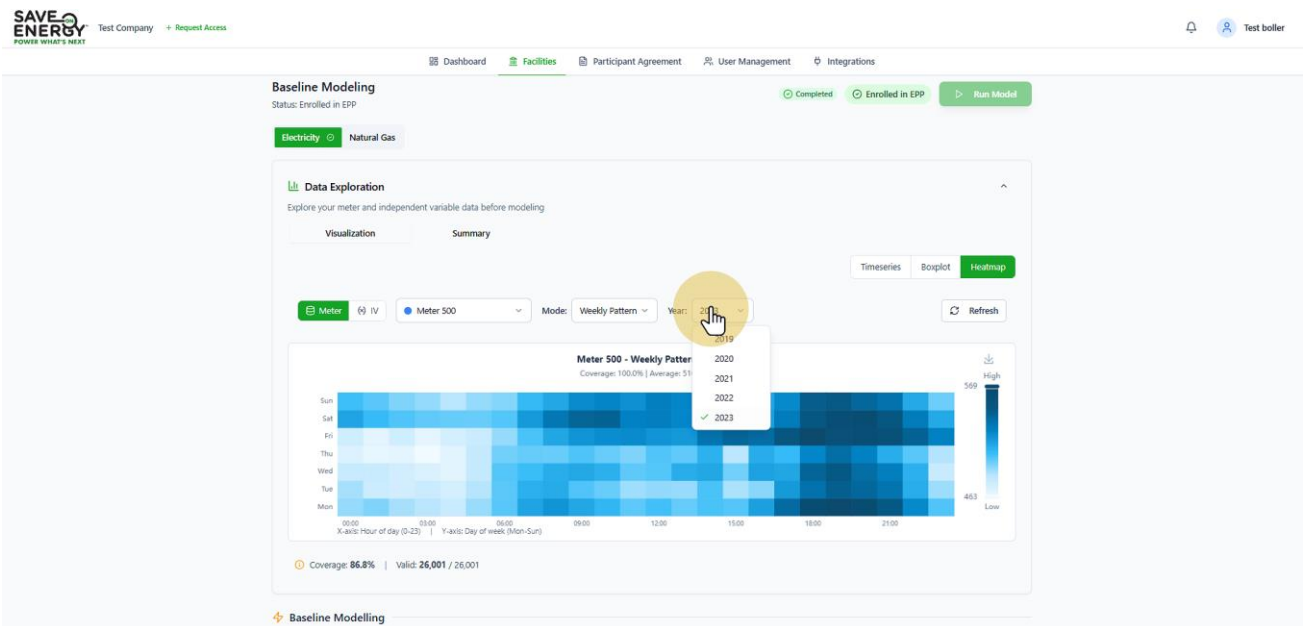
- Box Plot

The box plot shows how the selected meter's energy usage is distributed for each month across the chosen time period. Each box represents the range and variability of energy consumption within a month rather than individual data points.



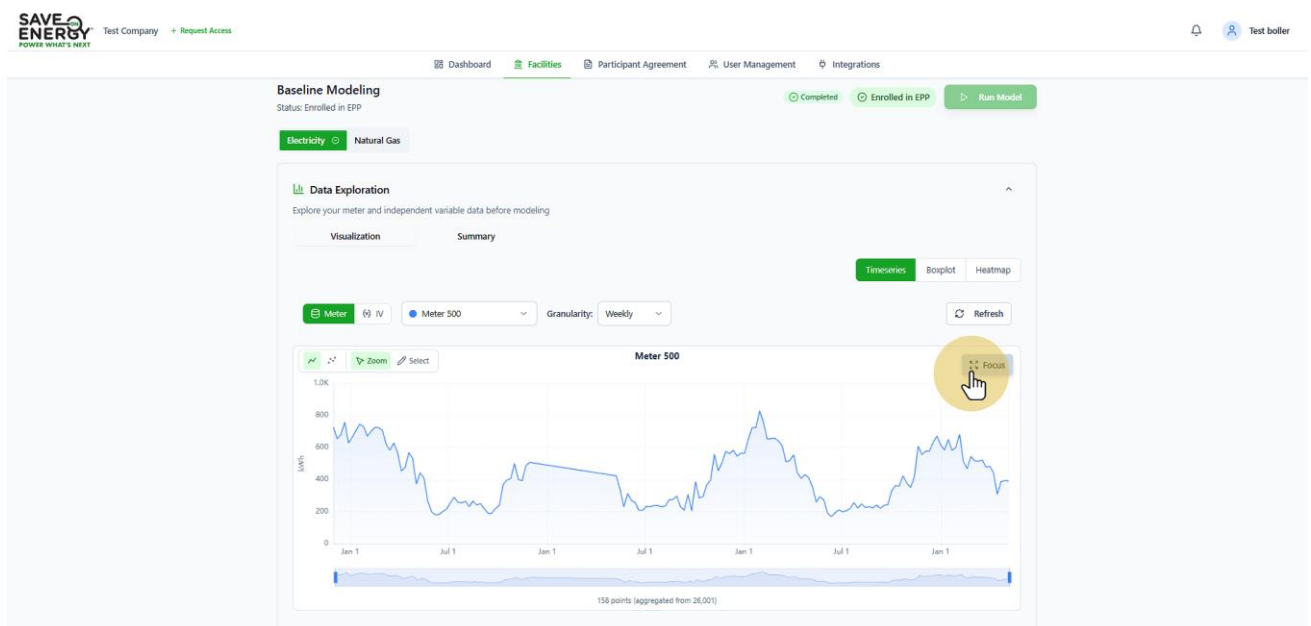
- Heatmap

The heatmap visualizes how energy usage changes across the **days of the week** and **hours of the day**. Each cell represents average energy consumption for a specific hour on a specific day.



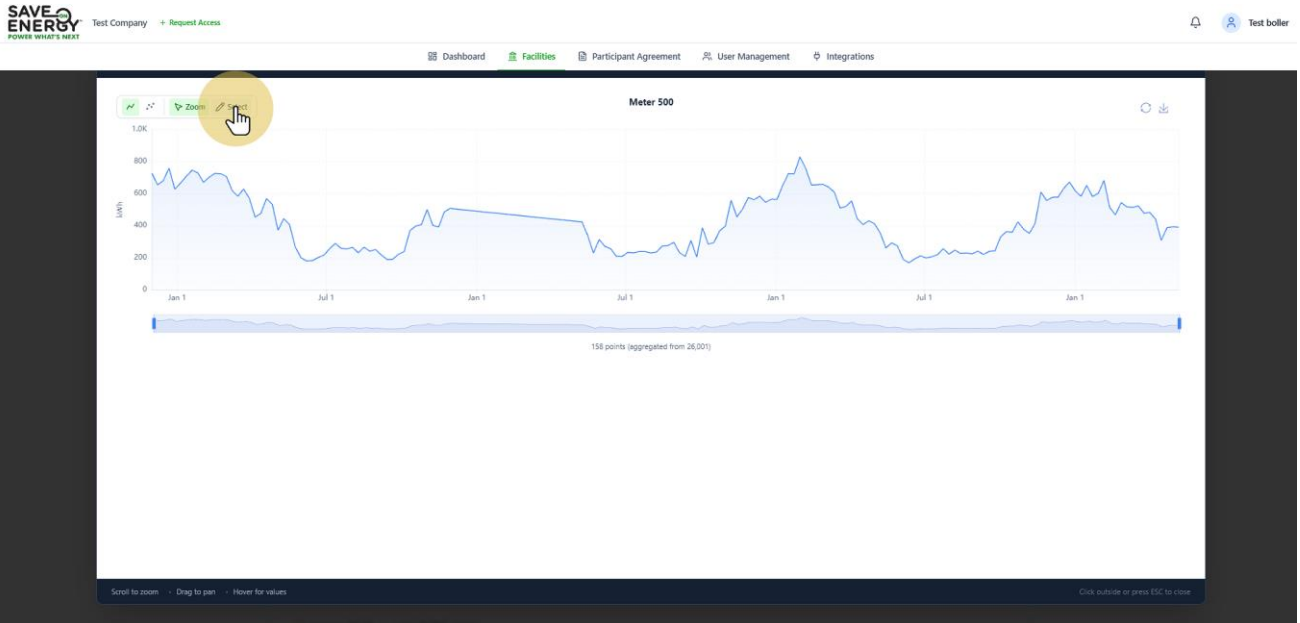
- View Chart in Focus Mode

On hover, a **Focus** button appears on the chart. Clicking this button opens a **larger, expanded view of the chart**, allowing you to examine trends and details more clearly without other UI distractions.



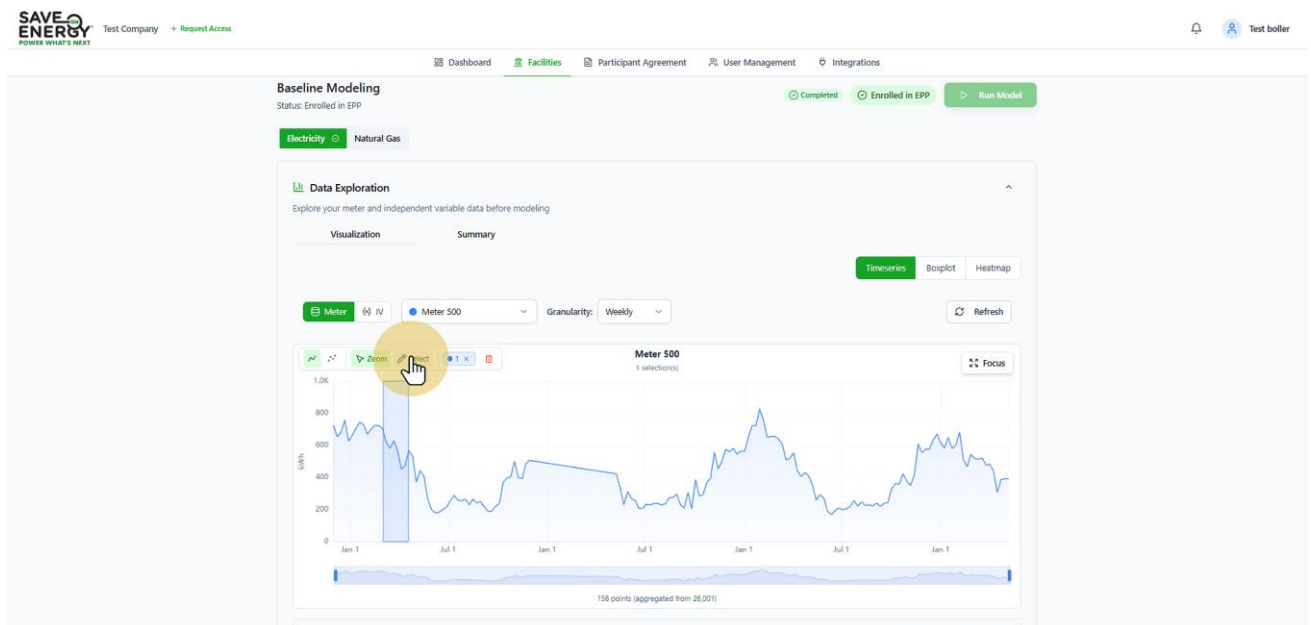
- Focus mode

This view displays the selected chart in Focus Mode, allowing you to analyze meter data in a larger, distraction-free layout. You can zoom, pan, and hover over data points to inspect values in more detail, making it easier to identify trends, peaks, and anomalies over time.



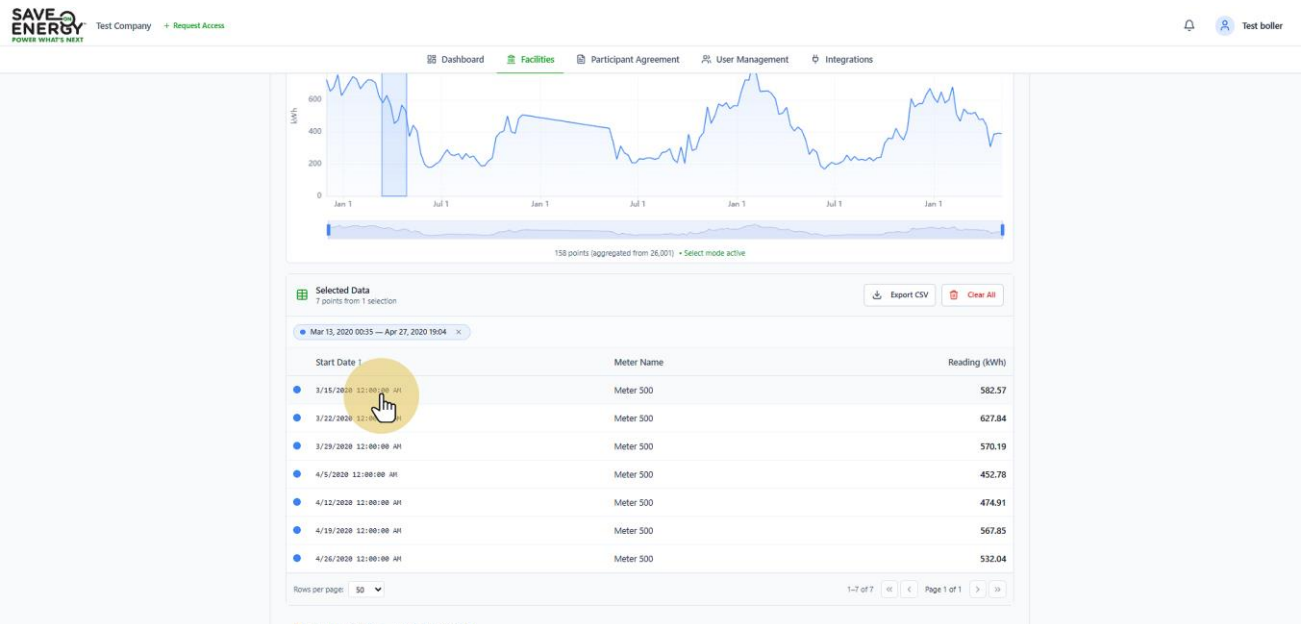
- Select Functionality

Use Select to highlight and focus on a specific range of data within the chart. Drag across the chart to isolate a time, allowing you to closely analyze trends, patterns, or anomalies for that selected segment only.



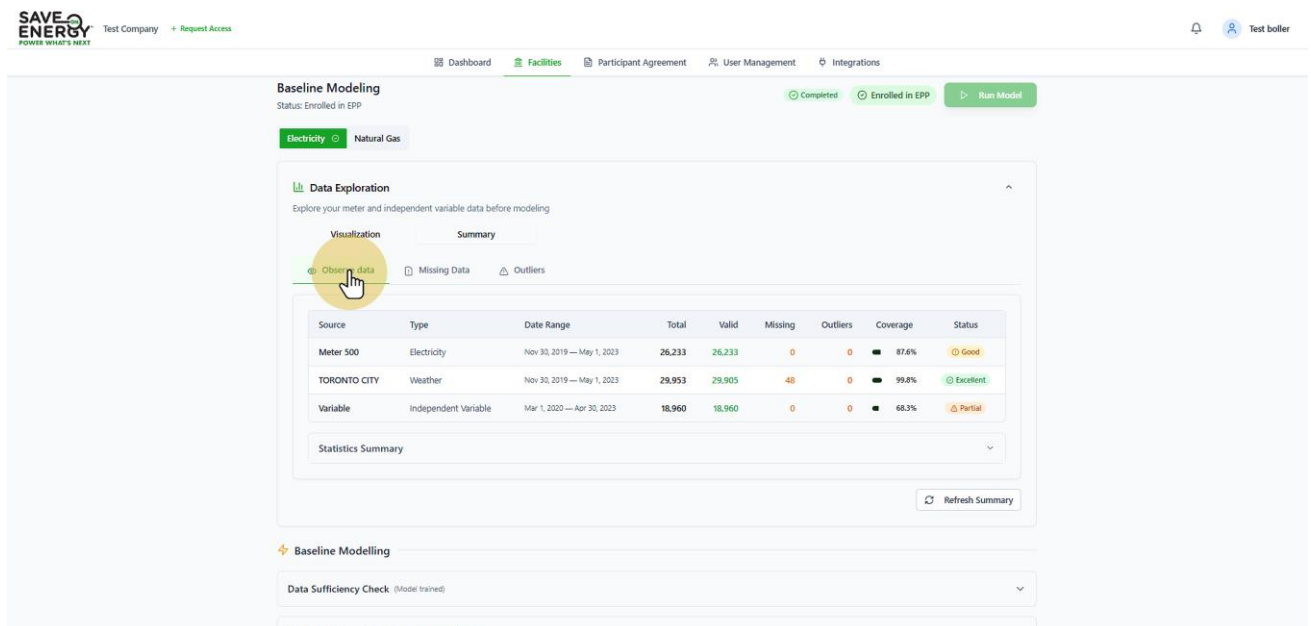
- Selected Data

After a range is selected on the chart, the corresponding data points automatically appear in the table below. This section shows the exact start dates, meter values, and readings for the selected period, making it easy to review, export, or clear the selection.



- Observe Data

After the baseline model is run, this section provides a clear summary of the data used in modeling. You can review electricity meter data, weather data, and independent variables, including total records, valid data points, missing values, outliers, overall coverage, and data quality status.



- Missing Data

This section highlights gaps and anomalies in the dataset, including null values, zero values, negative values, and missing timestamps. It identifies affected parameters, the time ranges impacted, and the duration of each gap, helping verify data completeness and identify issues that may affect baseline modeling accuracy.

Baseline Modeling
Status: Enrolled in EPP

Electricity Natural Gas

Data Exploration
Explore your meter and independent variable data before modeling

Visualization Summary

Observe data Missing Data Outliers

Missing data includes NULL values, negative values, and zero values for electricity meters. (1 timeline gaps detected)

Index	Parameter	Timestamp start	Timestamp end	Count
1	TEMPERATURE, TORONTO CITY	2019/12/24 12:00	2022/10/27 14:00	48

Timeline Gaps (Missing Timestamps)

Index	Gap Start	Gap End	Duration	Missing Hours
1	2020/11/29 23:00	2021/05/04 00:00	155 days	3,720

Refresh Summary

Baseline Modelling

Data Sufficiency Check (Model trained)

- Outliers

This section checks the dataset for abnormal or extreme values that fall outside expected ranges. Outliers can indicate data quality issues, meter faults, or unusual operating conditions that may impact baseline modeling.

Baseline Modeling
Status: Enrolled in EPP

Electricity Natural Gas

Data Exploration
Explore your meter and independent variable data before modeling

Visualization Summary

Observe data Missing Data Outliers

No outliers detected in the data

Refresh Summary

Baseline Modelling

Data Sufficiency Check (Model trained)

Model Configuration & Results completed

CREATED	SUBMITTED	MODEL STATUS	ADMIN STATUS
1/15/2026	1/15/2026	completed	enrolled

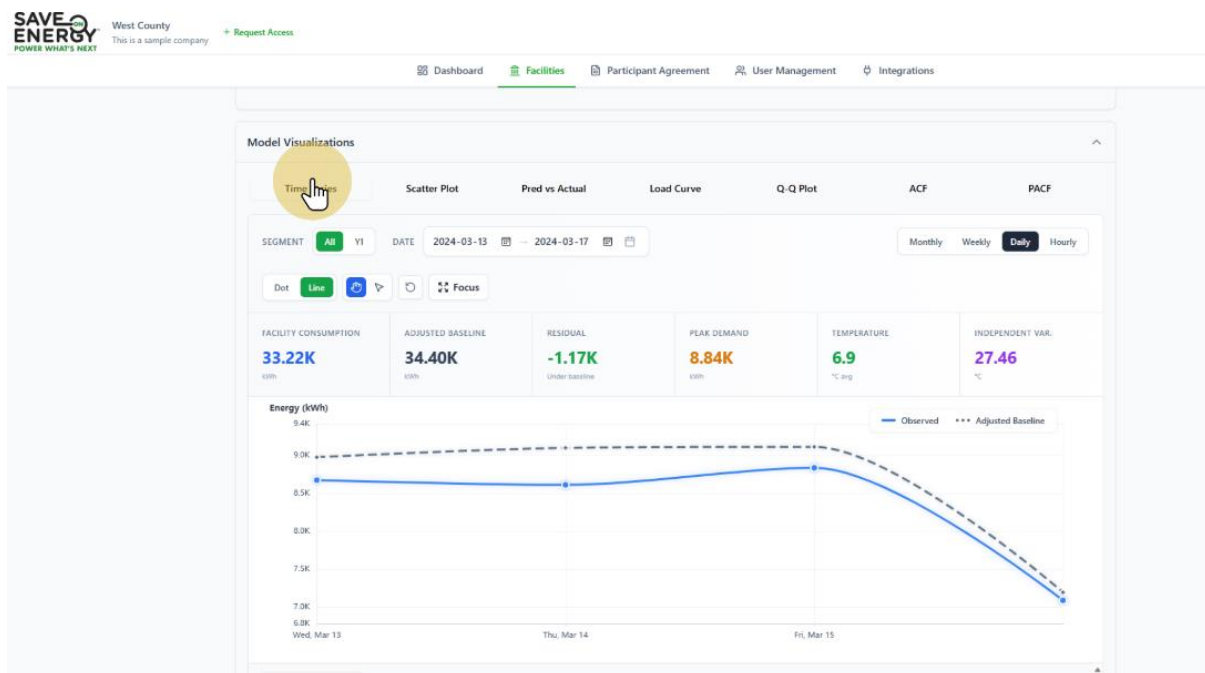
- Time Series View

The Time Series chart shows how your facility's energy usage changes over time and compares actual consumption against the modeled baseline. The solid line represents observed energy consumption, while the dashed line represents the adjusted baseline generated by the model.

You can use this view to:

- Visually compare real energy use versus expected baseline performance over a selected date range.
- Identify trends, patterns, and seasonal behavior in consumption.
- Spot periods where usage is above or below the baseline, which helps indicate overperformance or savings.
- Switch between Daily, Weekly, Monthly, or Hourly views to analyze the data at different levels of detail.
- Toggle segments, adjust the date range, and use focus mode to closely inspect specific time periods.

This chart is especially useful after the baseline is run, as it provides a clear, time-based validation of how well the model aligns with actual facility performance.



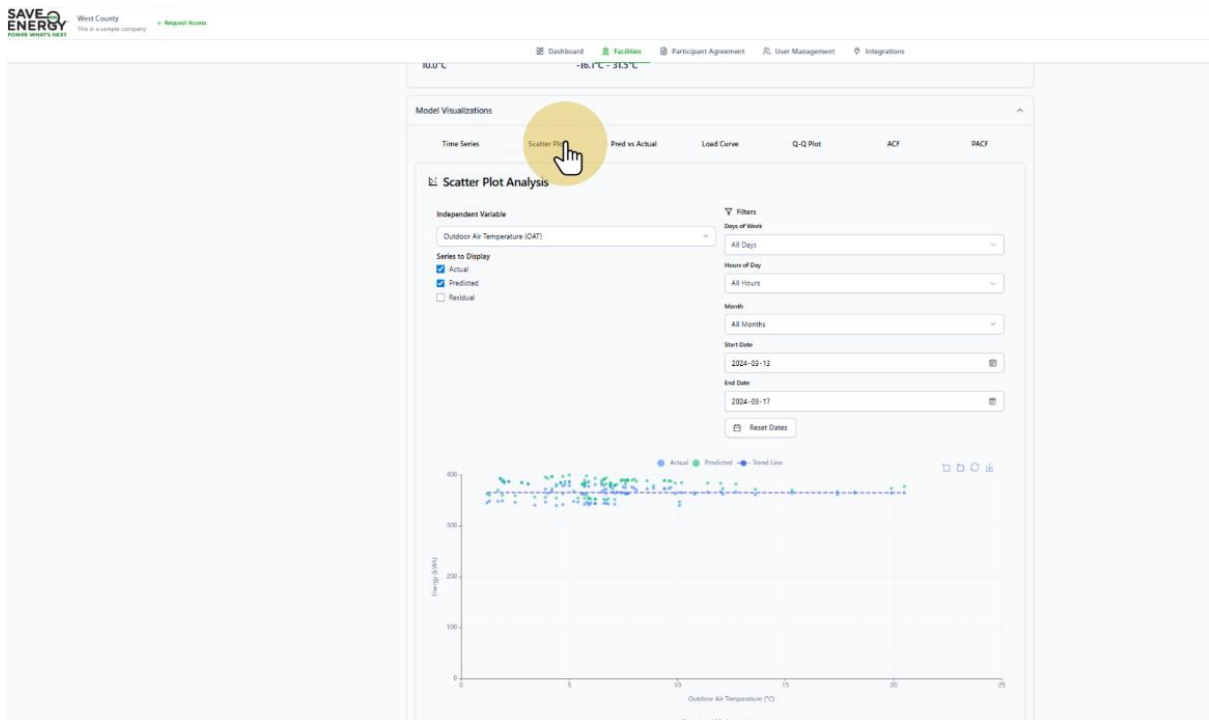
- Scatter Plot Analysis

The Scatter Plot view shows the relationship between your facility's energy consumption and an independent variable, such as Outdoor Air Temperature (OAT). Each point on the chart represents an observed or predicted energy value at a specific condition, helping you understand how external factors influence energy use.

In this view, you can:

- Compare Actual versus Predicted energy values to see how closely the model fits real-world behavior.
- View the trend line, which highlights the overall relationship between the independent variable and energy consumption.
- Identify patterns such as linear trends, plateaus, or changes in slope that indicate heating, cooling, or base-load behavior.
- Detect anomalies or outliers where actual usage deviates significantly from predicted values.
- Apply filters for days of the week, hours of the day, months, and custom date ranges to isolate specific operating conditions.

This chart is useful for validating model assumptions and understanding how strongly independent variables (like temperature) drive energy usage across different conditions and time periods.

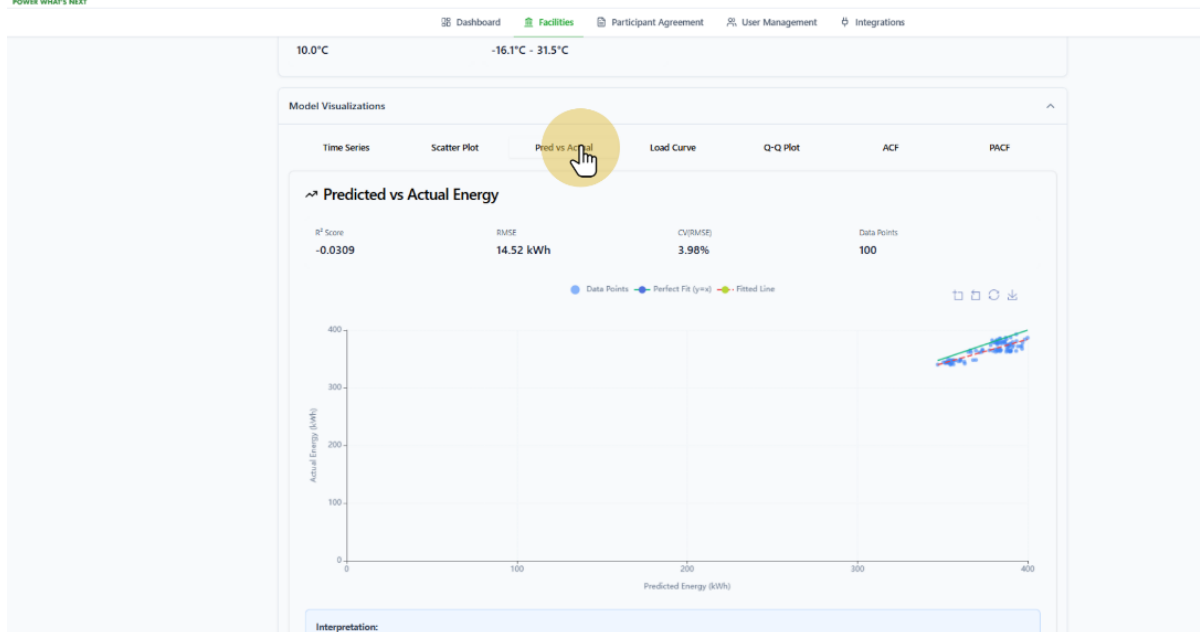


- Predicted vs Actual Energy

The Predicted vs Actual chart compares the energy values generated by the baseline model against the facility's measured (actual) energy consumption. Each point on the chart represents a data point where the x-axis shows predicted energy and the y-axis shows actual energy for the same time period.

Key elements of this view include:

- **Data points:** Each dot shows how closely the model's prediction matches the actual observed energy use.
- **Perfect fit line ($y = x$):** This diagonal reference line represents an ideal model where predicted and actual values are identical. Points closer to this line indicate higher model accuracy.
- **Fitted line:** This line shows the overall trend of the data, helping you see whether the model tends to over-predict or under-predict energy usage.
- **R^2 score:** Indicates how well the model explains the variation in actual energy consumption. Higher values mean a stronger model fit.
- **RMSE (kWh):** Shows the average magnitude of prediction error in energy units, helping quantify how far predictions typically deviate from actual values.
- **CV(RMSE):** Expresses the prediction error as a percentage, making it easier to compare model performance across facilities or time periods.
- **Data points count:** Indicates how many observations were used in this comparison.

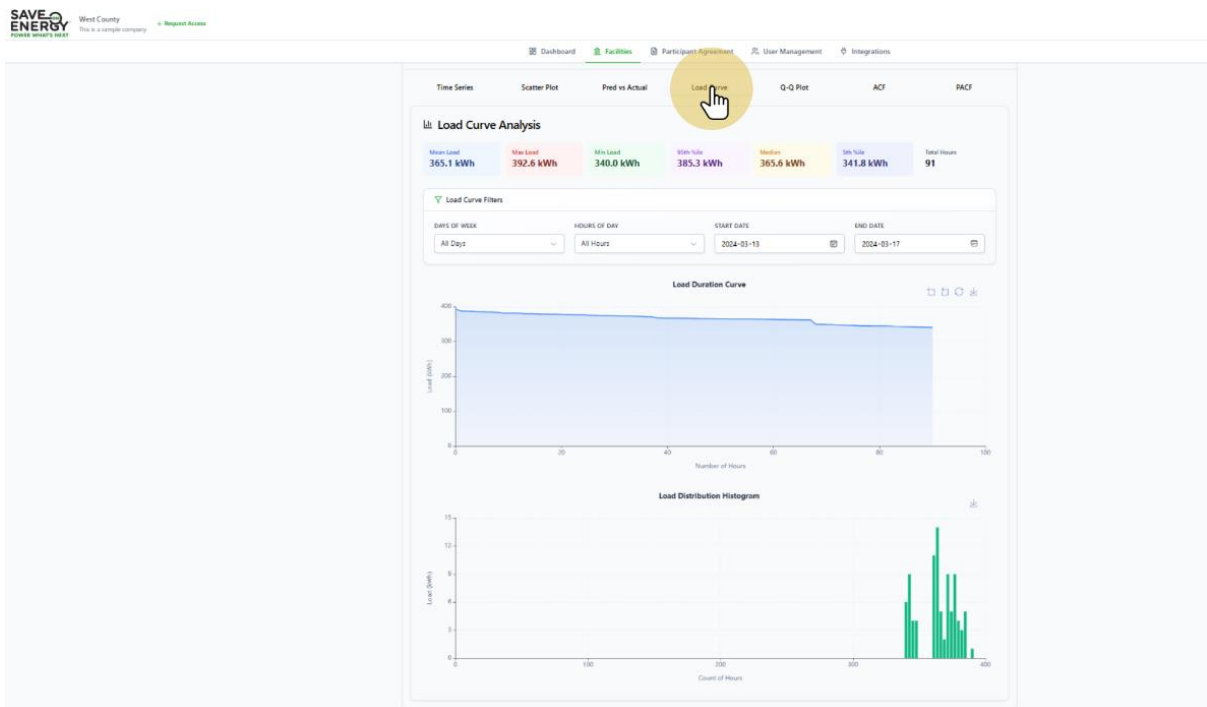


- Load Curve Analysis

The **Load Curve Analysis** view explains how your facility's energy demand is distributed over time and how often specific load levels occur. This section is useful for understanding demand behavior, identifying peak loads, and assessing opportunities for load shifting or demand reduction.

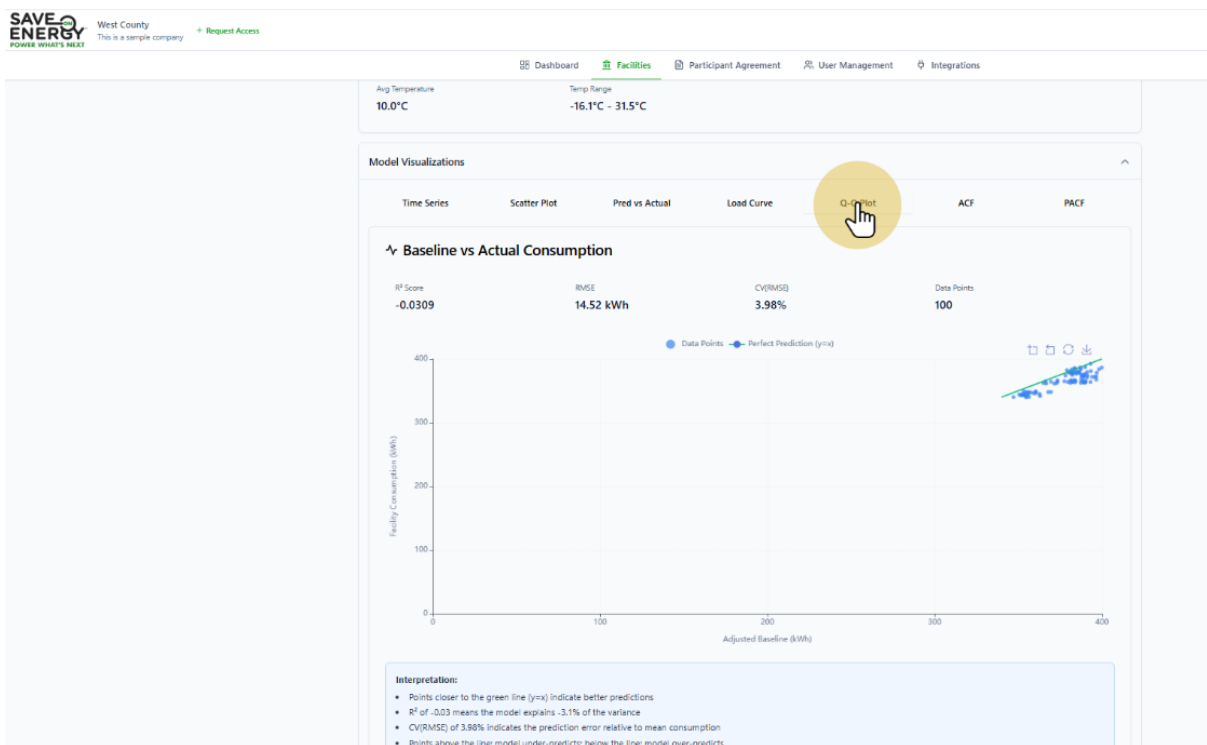
Key metrics (top summary):

- **Mean Load:** The average load across the selected time range.
- **Max Load:** The highest demand recorded, representing peak load conditions.
- **Min Load:** The lowest observed demand.
- **95th Percentile Load:** A high-load threshold showing demand levels that are exceeded only 5% of the time, often used for demand management planning.
- **Median Load:** The midpoint load value, where half of the hours are above and half are below.
- **5th Percentile Load:** A low-load threshold showing base-load behavior.
- **Total Hours:** The number of hours included in the analysis.



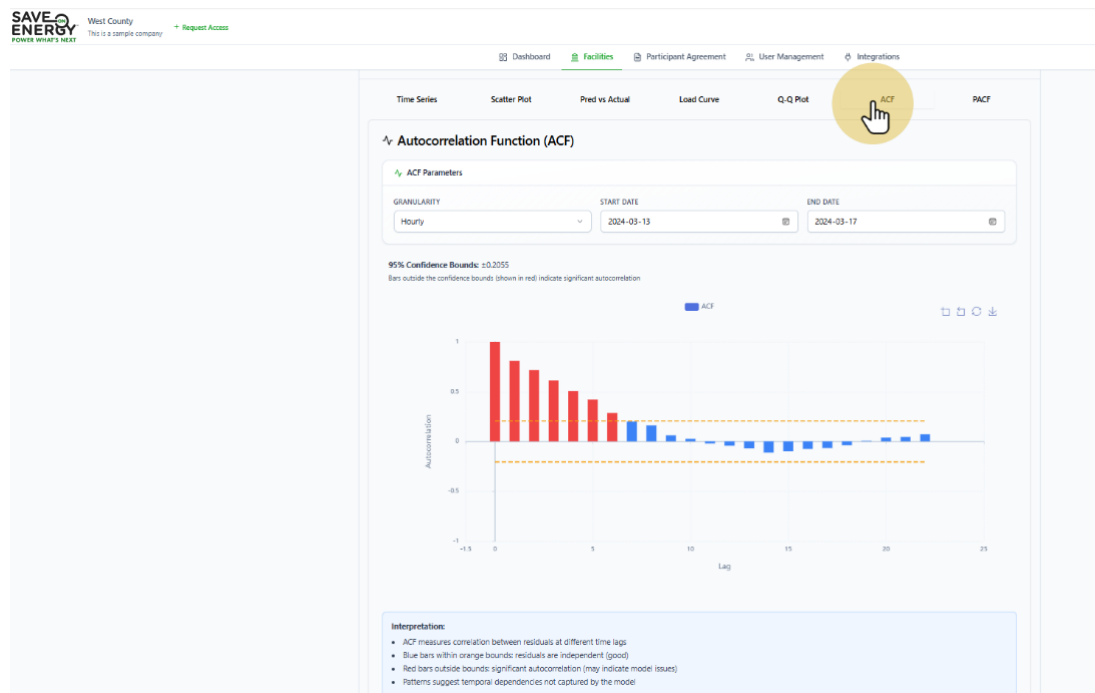
- Q-Q Plot

The **Q-Q Plot** (Quantile–Quantile plot) is used to check whether the model's **residuals** (the difference between actual and predicted values) follow a normal distribution



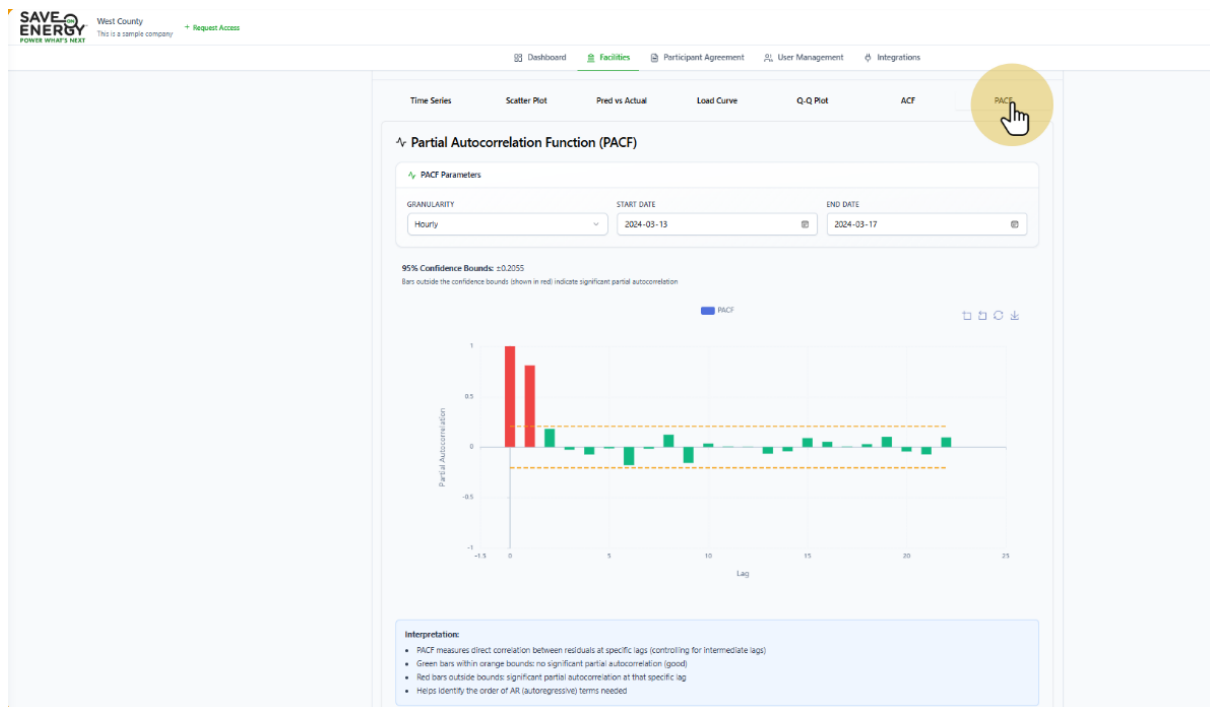
- Autocorrelation Function (ACF)

The Autocorrelation Function (ACF) chart helps you understand whether the model's residuals (actual minus predicted values) are still correlated over time. Ideally, residuals should behave like random noise—meaning today's error shouldn't predict tomorrow's error. If strong autocorrelation remains, it can indicate that the model is missing time-based patterns (like daily cycles or operational schedules).



- Partial Autocorrelation Function (PACF)

The **Partial Autocorrelation Function (PACF)** chart shows how the model's **residuals** are directly correlated with specific past time steps **after removing the influence of all shorter lags**. Unlike ACF, which includes both direct and indirect effects, PACF isolates the *true* relationship at each lag. This makes it especially useful for diagnosing whether the baseline model has captured the right time-dependent structure.

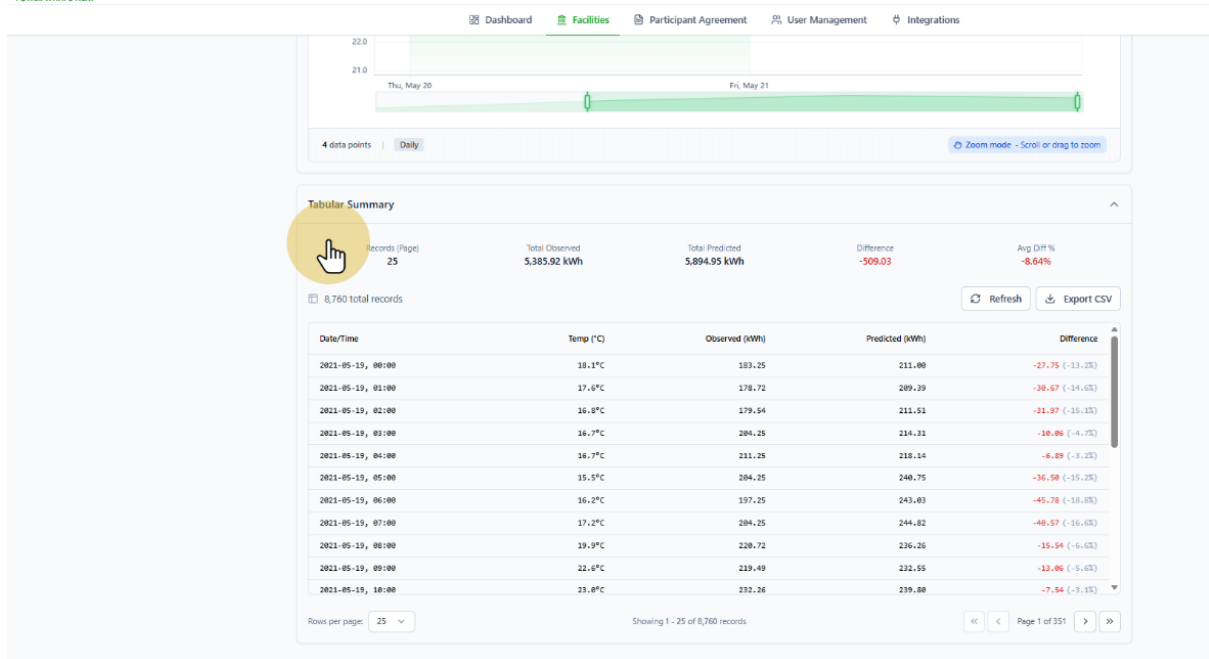


8.9 Tabular Summary

The tabular summary provides a detailed, record-level view of how your **actual (observed)** energy consumption compares against the **baseline model's predicted** energy use over the selected period.

At the top of the table, you'll see aggregated statistics for the selected date range:

- **Records (Page):** Number of data points currently displayed on the page
- **Total Observed (kWh):** Total actual energy consumption recorded
- **Total Predicted (kWh):** Total energy consumption predicted by the baseline model
- **Difference (kWh):** The total variance between predicted and observed values
- **Avg Diff (%):** Average percentage difference across all displayed records



9. Performance

This section shows how your facility is performing against its approved baseline and savings targets under the pay-for-performance program.

9.1 Baseline Summary

This section summarizes the baseline used to measure savings:

- Baseline Period**
 The approved historical date range used to establish normal energy usage (e.g., one full year).
- Baseline Energy Consumption (kWh)**
 Total electricity consumption during the baseline period.
- Baseline Peak Demand (kW)**
 The highest recorded demand during the baseline period.
- Pre-Project Incentive / Incentive Cap**
 Displays applicable incentive values tied to the baseline. These baseline values are used as the reference point to calculate actual savings during

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Summary Details Energy & Water Weather & IVs Baseline **Performance** Savings Plan

Performance Tracking
Pay-for-performance results and savings verification

Electricity Natural Gas

TARGET **20.00%** MIN SAVINGS **5000.0%** PRE-PROJECT **\$30,000.00** INCENTIVE CAP **\$3,000.00**

Baseline summary

Baseline Energy Model

Baseline Periods 8736 (31st January 2023 to 29th January 2024)

Baseline Energy Consumption (kWh)	1,558,165.36 kWh
Baseline Peak Demand (kW)	106.37 kW
Pre-Project Incentive (\$)	\$30,000.00
Incentive cap (\$)	\$3,000.00

Performance period data summary

Observe data Missing Data 13 Outliers

9.2 Performance Period Data Summary

The Performance Period Data Summary section helps you review the quality and completeness of your data used during the performance (pay-for-performance) period. This section is divided into three key views that allow you to quickly identify issues before savings are calculated or reported.

- Observed Data

This view gives you a high-level summary of all data sources used during the performance period, such as:

- Electricity meter data
- Weather data
- Independent variables (IVs)

For each data source, you can see:

- The date range covered
- Total records collected
- Valid records
- Missing records
- Outliers
- Overall data coverage percentage
- A status indicator

Test Company
+ Request Access

Test boiler

Dashboard
Facilities
Participant Agreement
User Management
Integrations

Baseline Peak Demand (kW)
106.37 kW

Pre-Project Incentive (\$)
\$30,000.00

Incentive cap (\$)
\$3,000.00

Performance period data summary

Observe data

Missing Data 13

Outliers

Source	Type	Date Range	Total	Valid	Missing	Outliers	Coverage	Status
Meter 213	Electricity	May 4, 2023 — Apr 23, 2025	15,264	15,264	0	0	88.2%	Good
TORONTO CITY	Weather	May 4, 2023 — Mar 31, 2025	16,752	16,739	13	0	99.9%	Excellent
IV	Independent Variable	May 4, 2023 — May 25, 2025	18,072	18,072	0	0	100.0%	Excellent

Statistics Summary

Refresh Summary

Performance period reporting Information

FIRST PAY-FOR-PERFORMANCE

SECOND PAY-FOR-PERFORMANCE

THIRD PAY-FOR-PERFORMANCE

Showing saved results

- Missing Data

The Missing Data tab highlights any gaps found in your performance period data. Here, you can:

- See the number of missing data points
- Identify which parameter is affected (for example, temperature)
- Review the start and end timestamps where data is missing

Test Company
+ Request Access

Test boiler

Dashboard
Facilities
Participant Agreement
User Management
Integrations

Baseline Peak Demand (kW)
106.37 kW

Pre-Project Incentive (\$)
\$30,000.00

Incentive cap (\$)
\$3,000.00

Performance period data summary

Observe data

Missing Data 13

Outliers

Missing data includes NULL values, negative values, and zero values for electricity meters.

Index	Parameter	Timestamp start	Timestamp end	Count
1	TEMPERATURE	2023/11/07 10:00	2024/09/10 08:00	13

Refresh Summary

Performance period reporting Information

FIRST PAY-FOR-PERFORMANCE

SECOND PAY-FOR-PERFORMANCE

THIRD PAY-FOR-PERFORMANCE

Showing saved results

Pay-for-performance period

From 2023-05-03, to 2025-06-21

Adjusted baseline electricity consumption (kWh)

1,030,248

Estimated

- Outliers

The Outliers tab shows whether any abnormal data points were detected during the performance period.

SAVE ENERGY Test Company + Request Access

Dashboard Facilities Participant Agreement User Management Integrations

Baseline Peak Demand (kW) 106.37 kW

Pre-Project Incentive (\$) \$30,000.00

Incentive cap (\$) \$3,000.00

Performance period data summary

Observe data Missing Data 13 **Outliers**

Outliers are detected using the IQR (Interquartile Range) method with a 3x threshold.

No outliers detected in the data

Refresh Summary

Performance period reporting information

FIRST PAY-FOR-PERFORMANCE SECOND PAY-FOR-PERFORMANCE THIRD PAY-FOR-PERFORMANCE

Showing saved results

Pay-for-performance period From 2023-05-03, to 2025-06-21

- **Statistics Summary**

The Statistics Summary section provides a high-level statistical overview of the data used during the performance period. It helps you understand the range, central tendency, and variability of each data source.

SAVE ENERGY Test Company + Request Access

Dashboard Facilities Participant Agreement User Management Integrations

Baseline Peak Demand (kW) 106.37 kW

Pre-Project Incentive (\$) \$30,000.00

Incentive cap (\$) \$3,000.00

Performance period data summary

Observe data Missing Data 13 Outliers

Source	Type	Date Range	Total	Valid	Missing	Outliers	Coverage	Status
Meter 213	Electricity	May 4, 2023 — Apr 23, 2025	15,264	15,264	0	0	88.2%	Good
TORONTO CITY	Weather	May 4, 2023 — Mar 31, 2025	16,752	16,739	13	0	99.9%	Excellent
IV	Independent Variable	May 4, 2023 — May 25, 2025	18,072	18,072	0	0	100.0%	Excellent

Statistics Summary

Source	Min	Max	Mean	Median	Std Dev
Meter 213	62.04	465.24	171.88	126.96	91.36
TORONTO CITY	-16.20	32.80	10.84	11.30	9.84
IV	0.00	1.00	0.02	0.00	0.16

Refresh Summary

9.3 Performance Period Reporting Information

The Performance Period Reporting Information section summarizes electricity savings and incentive calculations for each pay-for-performance period. This section is used to review, submit, and track verified savings results.

- Reporting Details

Within each pay-for-performance period, the following information is displayed:

Pay-for-Performance Period: The start and end dates used for savings calculations.

Adjusted Baseline Electricity Consumption (kWh): The baseline energy consumption after applying approved adjustments.

Reporting Period Electricity Consumption (kWh): The actual measured electricity consumption during the reporting period.

Non-Routine Adjustment (kWh): Adjustments applied to account for non-routine changes.

On-Peak and Off-Peak Electricity Savings (kWh): Calculated energy savings segmented by time-of-use.

Total Electricity Savings (kWh): The sum of on-peak and off-peak electricity savings.

Peak Demand Savings (kW): The reduction in peak electrical demand achieved during the period.

Performance period reporting information		
FIRST PAY-FOR-PERFORMANCE	SECOND PAY-FOR-PERFORMANCE	THIRD PAY-FOR-PERFORMANCE
Showing saved results		
Pay-for-performance period	From 2023-05-03, to	2025-06-21
Adjusted baseline electricity consumption (kWh)	1,030,248	Estimated
Reporting period electricity consumption (kWh)	1,027,314	Estimated
Non-routine adjustment (kWh)	0	Estimated
On-peak electricity savings (kWh)	503	Submitted
Off-peak electricity savings (kWh)	2432	Submitted
Total electricity savings (kWh)	2,935	Estimated
Peak demand savings (kW)	1	Estimated
Electricity savings as percentage of adjusted baseline electricity consumption and non-routine adjustment	0%	Estimated
Off-peak electricity savings incentive (\$)	195	Submitted
On-peak electricity savings incentive (\$)	151	Submitted
Performance incentive (\$)	345	Submitted
Performance incentive payment status	Select status	

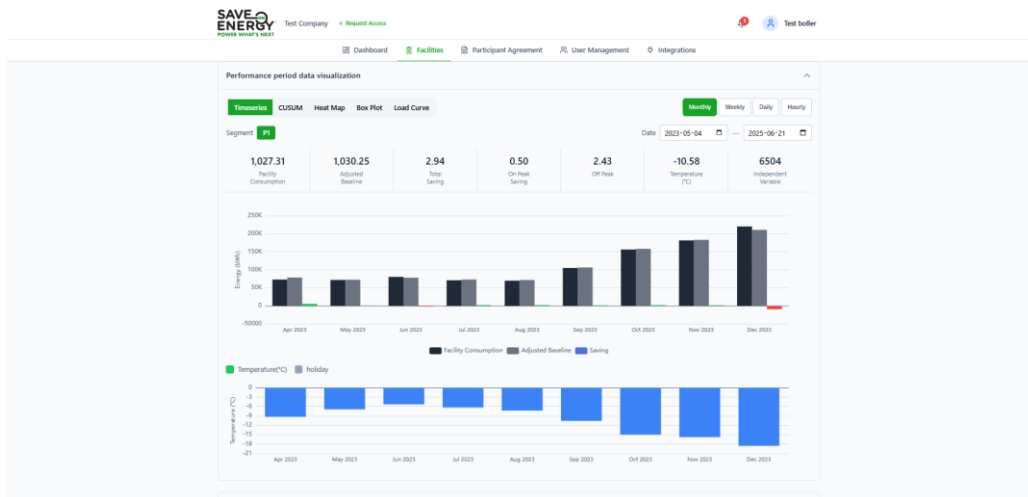
9.4 Performance Period Data Visualization

The **Performance Period Data Visualization** section provides a visual breakdown of energy consumption, baseline usage, and verified savings during the selected pay-for-performance period. This view helps you understand how actual performance compares to the adjusted baseline over time.

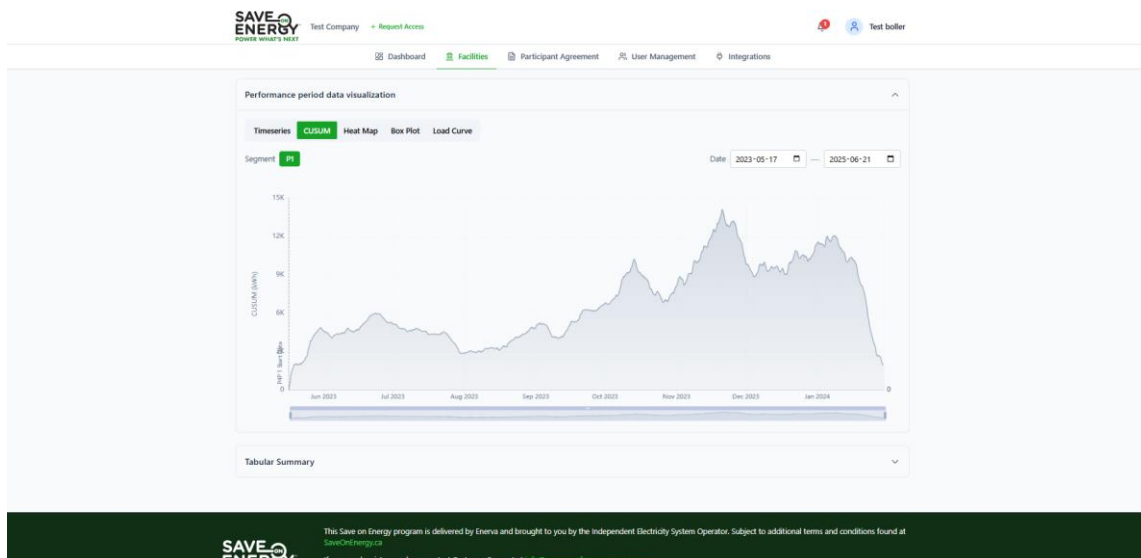
- Visualization Tabs

You can switch between multiple chart views to analyze performance from different perspectives:

Time Series: Displays trends in energy consumption, adjusted baseline, and savings across the selected time range.



CUSUM: Shows cumulative savings over time to highlight long-term performance trends.



- Heat Map:

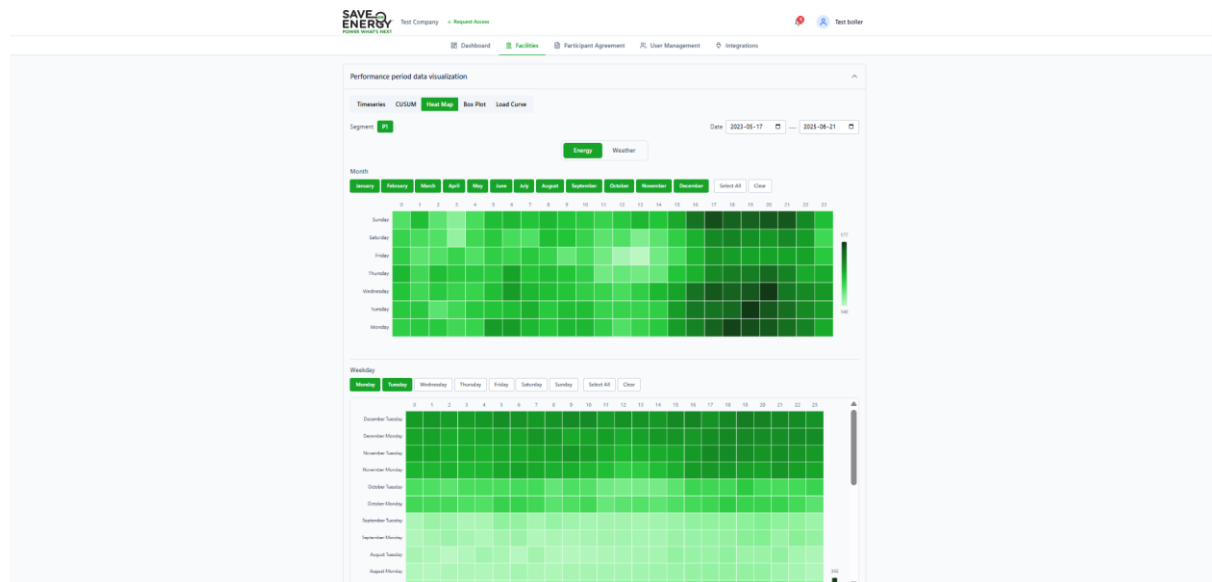
The Heat Map chart provides a visual way to understand when energy usage is highest and lowest across time during the selected performance period.

Here's how to read and use it:

- Rows represent days (such as Monday–Sunday), while columns represent hours of the day (0–23).
- Each cell is color-coded to show the relative level of energy consumption for that specific day and hour.
- Darker green shades indicate higher energy use, while lighter shades indicate lower usage.

Key controls and features:

- Energy / Weather toggle lets you switch between viewing energy consumption patterns and weather-related patterns.
- Month filters allow you to focus on specific months or compare seasonal behavior.
- Weekday filters let you isolate weekdays or weekends to spot operational differences.
- Date range selection narrows the analysis to a specific period within the pay-for-performance window.



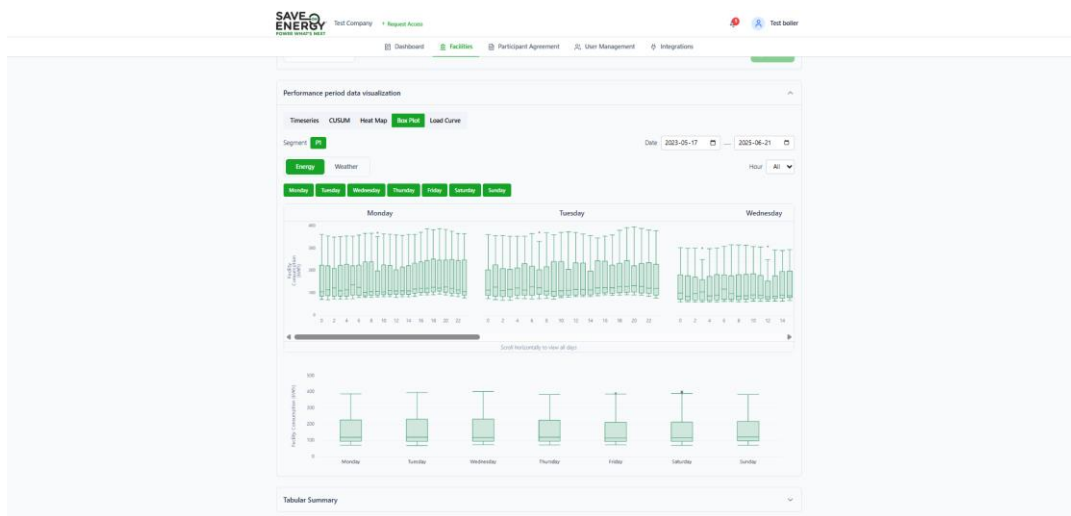
- Box Plot

The Box Plot view helps you understand how your facility's energy consumption varies across different days of the week and hours of the day. It summarizes large amounts of data into an easy-to-compare visual, making it easier to spot patterns, variability, and unusual behavior.

What you're looking at

Each box plot represents the distribution of electricity consumption (kWh) for a specific day of the week, broken down by hour:

- The box shows the typical range of energy use:
 - The middle line is the median (typical usage).
 - The top and bottom of the box represent the middle 50% of values.
- The lines extending above and below the box (whiskers) show the normal high and low ranges.



- Load Curve

The Load Curve view helps you understand how your facility's electricity demand behaves over time. It shows when energy use is highest, how often those high-load periods occur, and what your typical (base) load looks like. This information is useful for identifying peak demand issues and opportunities to reduce energy costs.

Load Duration Curve

The chart at the top displays a load duration curve, which orders electricity consumption from the highest to the lowest over the selected time period.

- The left side of the curve represents the highest electricity demand (peak load).
- The right side represents the lowest and most consistent demand (base load).
- A steep drop in the curve indicates short periods of very high demand, while a gradual slope indicates more stable energy use.

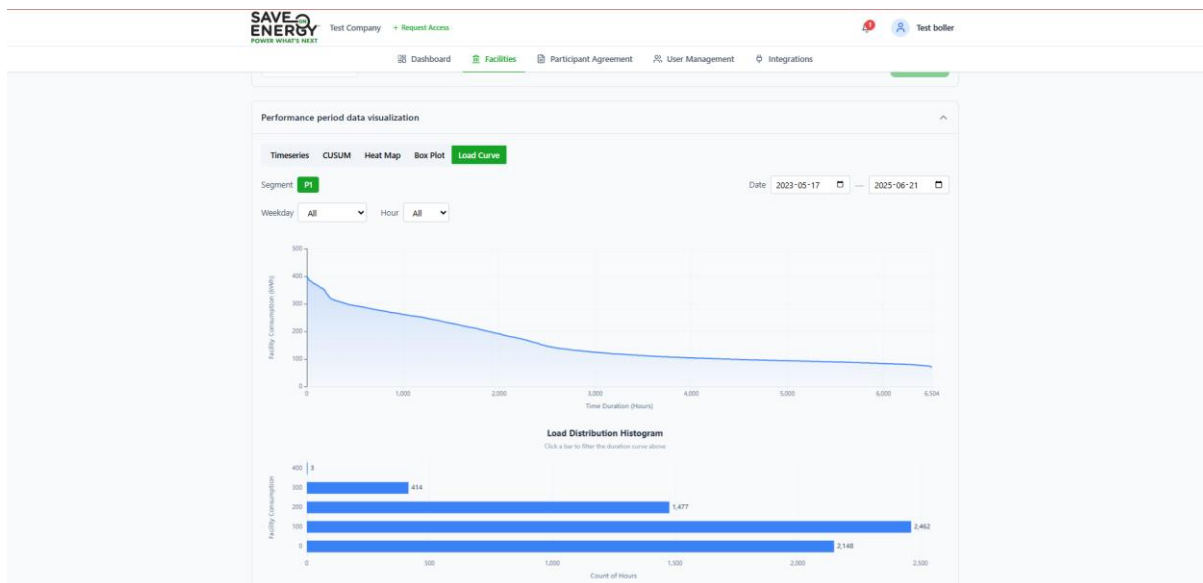
Use this chart to:

- Identify peak demand levels
- Understand how frequently peak loads occur
- Assess whether high demand is occasional or sustained

Load Distribution Histogram

The chart at the bottom shows a histogram of electricity consumption, grouped into load ranges.

- Each bar represents a range of electricity usage.
- The length of the bar shows how many hours the facility operated within that range.
- You can click on a bar to filter and highlight the corresponding portion of the load duration curve above.



9.5 Tabular Summary

You can find the Tabular Summary as the last section of the Performance screen. This section provides a detailed, row-by-row view of the data used to calculate savings during each pay-for-performance (P4P) period.

The tabs at the top of the table (for example, 1st P4P, 2nd P4P, 3rd P4P) allow you to switch between different pay-for-performance periods. Each tab updates the table to show data specific to the selected period and its corresponding date range.

Within the table:

- Start Date / End Date show the time interval for each record.
- Temperature (°C) displays the outdoor air temperature associated with that time period.
- Observed represents the actual measured electricity consumption.
- Predicted represents the baseline-adjusted consumption calculated by the model.

The screenshot shows the "Tabular Summary" section of the EPP Portal. It includes tabs for "1st P4P", "2nd P4P", and "3rd P4P", with the "1st P4P" tab selected. The table displays performance data for the period from 2023-05-03 to 2023-06-20. The table has five columns: Start Date, End Date, Temperature, Observed, and Predicted. The data is as follows:

Start Date	End Date	Temperature	Observed	Predicted
2023-05-03	2023-05-03	-13.1°C	195.2	158.08
2023-05-03	2023-05-03	-13.0°C	148.84	142.57
2023-05-03	2023-05-03	-13.4°C	184.2	159.94
2023-05-03	2023-05-03	-13.6°C	198.72	161.92
2023-05-03	2023-05-03	-13.5°C	175.36	162.12
2023-05-03	2023-05-03	-13.6°C	158.12	154.05
2023-05-03	2023-05-03	-13.4°C	207.96	159.76
2023-05-03	2023-05-03	-13.1°C	168.4	158.72
2023-05-03	2023-05-03	-12.7°C	153.44	153.06
2023-05-03	2023-05-03	-12.5°C	149.24	141.19

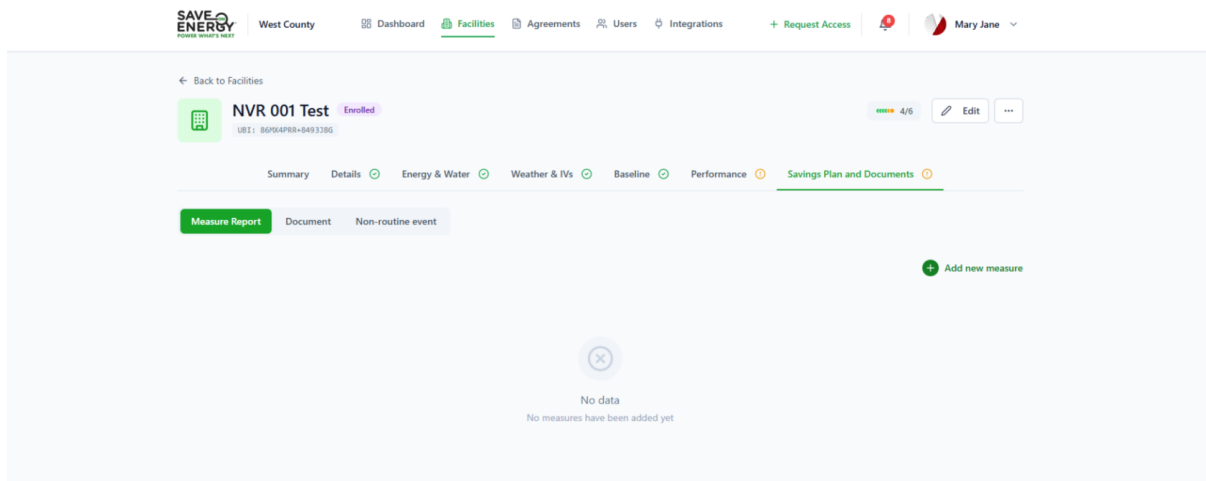
Below the table, there is a "Rows per page" dropdown set to 10 and a "Page 1 of 651 (6504 rows)" indicator. An "Export" button is also visible in the top right corner of the table area.

10. Savings Plan & Documents

The **Savings Plan** section is where you define, track, and document the energy conservation measures that contribute to your facility's overall savings target under the Energy Performance Program.

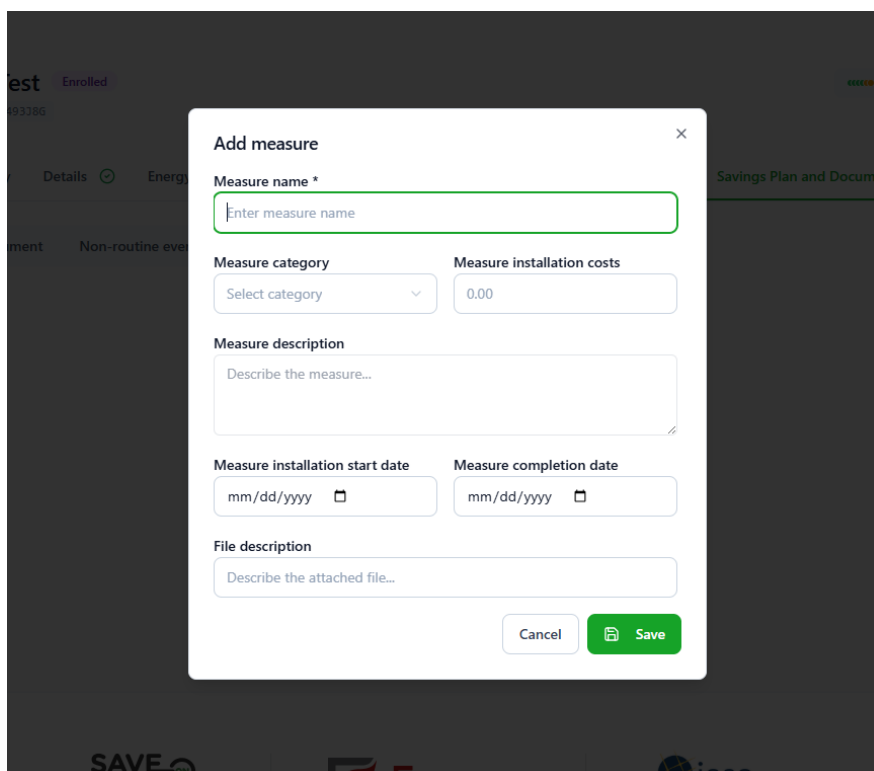
10.1 Measure reports section

The Measure Reports section is where users create and manage individual energy-saving measures for a facility. This area is used to document each efficiency measure, including its scope, implementation details, and expected or verified energy savings.



10.2 Add measure report

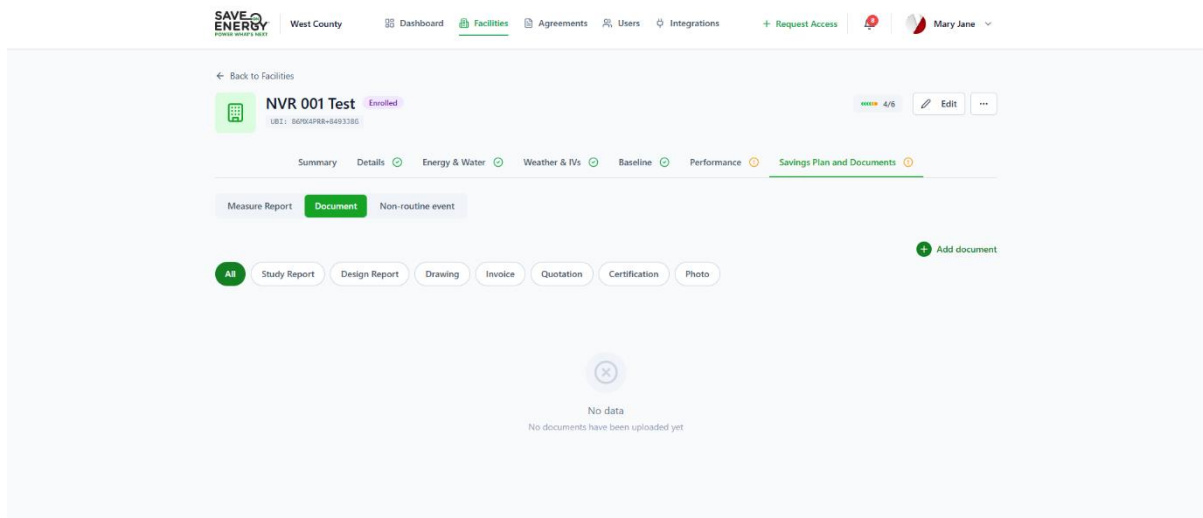
The Add Measure Report screen is used to create a new energy efficiency measure for a facility. Users must enter a Measure Name and can define the measure category, installation cost, and a clear measure description to explain the scope of the improvement.



10.3 Document section

The Document section allows users to upload, organize, and manage all supporting documentation related to a facility's savings plan and implemented measures.

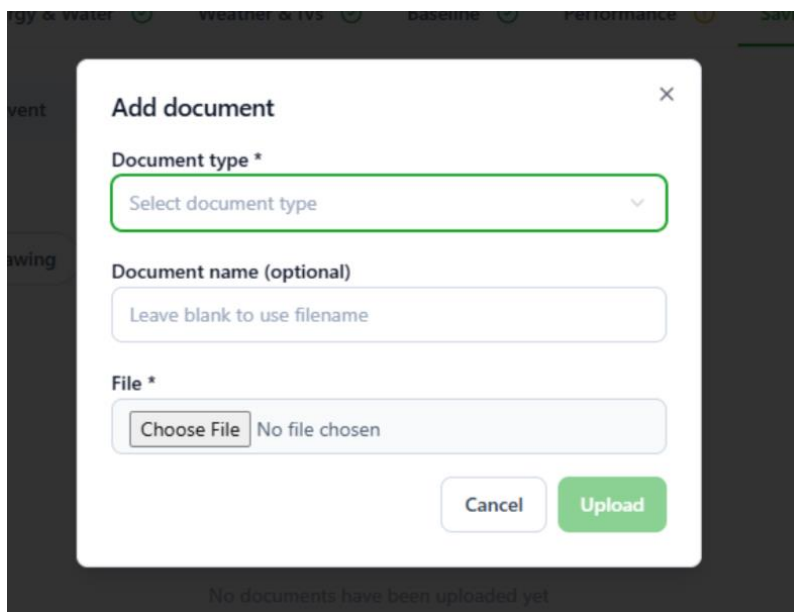
Users can select Add document to upload files such as Study Reports, Design Reports, Drawings, Invoices, Quotations, Certifications, and Photos. Uploaded documents can be filtered by category using the available document type tags for easier navigation and review.



10.4 Add Document Modal

The Add Document screen is used to upload supporting files related to a facility's savings plan and implemented measures. Users must select a Document Type (e.g., Study Report, Design Report, Invoice, Certification, Photo, etc.) to properly categorize the file. An optional Document Name can be entered to provide a custom title; if left blank, the system will automatically use the uploaded file's name.

To complete the process, users must select a file under File and click Upload. Once uploaded, the document becomes part of the facility's official record and can be filtered and accessed within the Document section for review and validation purposes.



10.5 Non-Routine Event

The Non-Routine Event section is used to record events that may impact a facility's energy consumption but are not part of normal operations. Examples include equipment failures, renovations, operational changes, weather-related disruptions, or other temporary conditions that could influence energy performance results.

The screenshot shows the 'Non-routine event' form within the EPP Portal. The top navigation bar includes the 'SAVE ENERGY' logo, 'West County', and various menu items like 'Dashboard', 'Facilities', 'Agreements', 'Users', 'Integrations', 'Request Access', and a user profile for 'Mary Jane'. Below the navigation, there's a breadcrumb trail: 'Back to Facilities' > 'NVR 001 Test' (Enrolled). The main content area has tabs for 'Summary', 'Details', 'Energy & Water', 'Weather & IVs', 'Baseline', 'Performance', and 'Savings Plan and Documents'. The 'Non-routine event' tab is active. The form itself is titled 'New Non-Routine Event' and contains fields for 'Event Name *' (with a hint: 'e.g., Equipment Failure, Renovation, Weather Event'), 'Start Date' (mm/dd/yyyy), 'End Date' (mm/dd/yyyy), and a 'Description' field (with a hint: 'Describe the event and its impact on energy consumption...'). At the bottom of the form are 'Save' and 'Cancel' buttons. A '+ Add non-routine event' button is also visible in the top right corner of the form area.

10.6 Add Non-Routine Event

The Add New Non-Routine Event screen allows users to formally document an event that has impacted facility energy use. Users must enter an Event Name, along with the applicable Start Date and End Date. A detailed Description should explain the nature of the event and its impact on energy consumption.

This screenshot is identical to the one in 10.5, showing the 'Non-routine event' form. It displays the same navigation bar, breadcrumb trail, and form fields: 'Event Name *', 'Start Date', 'End Date', and 'Description'. The 'Save' and 'Cancel' buttons are at the bottom. The '+ Add non-routine event' button is also present.

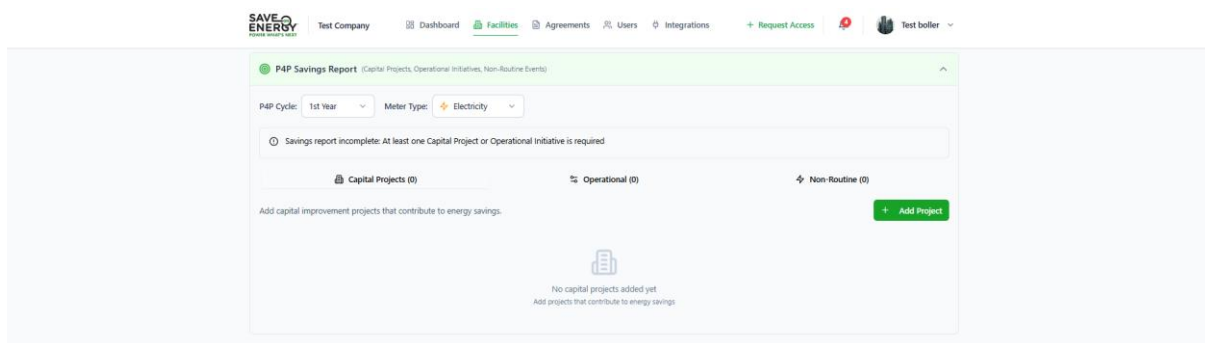
10.7 P4P Savings Report

The P4P (Pay-for-Performance) Savings Report section is used to track and report energy savings from Capital Projects, Operational Initiatives, and Non-Routine Events for a selected performance cycle.

Users can select the applicable P4P Cycle (e.g., 1st Year) and Meter Type (e.g., Electricity) to view and manage savings data. The system will indicate if the savings report is incomplete and requires at least one Capital Project or Operational Initiative to proceed.

Within this section, projects are organized into three categories:

- Capital Projects – Infrastructure or equipment upgrades that result in measurable energy savings.
- Operational Initiatives – Process or operational changes that improve efficiency without major capital investment.
- Non-Routine Events – Events that impact energy consumption and may require adjustments in reporting.



11. User Management

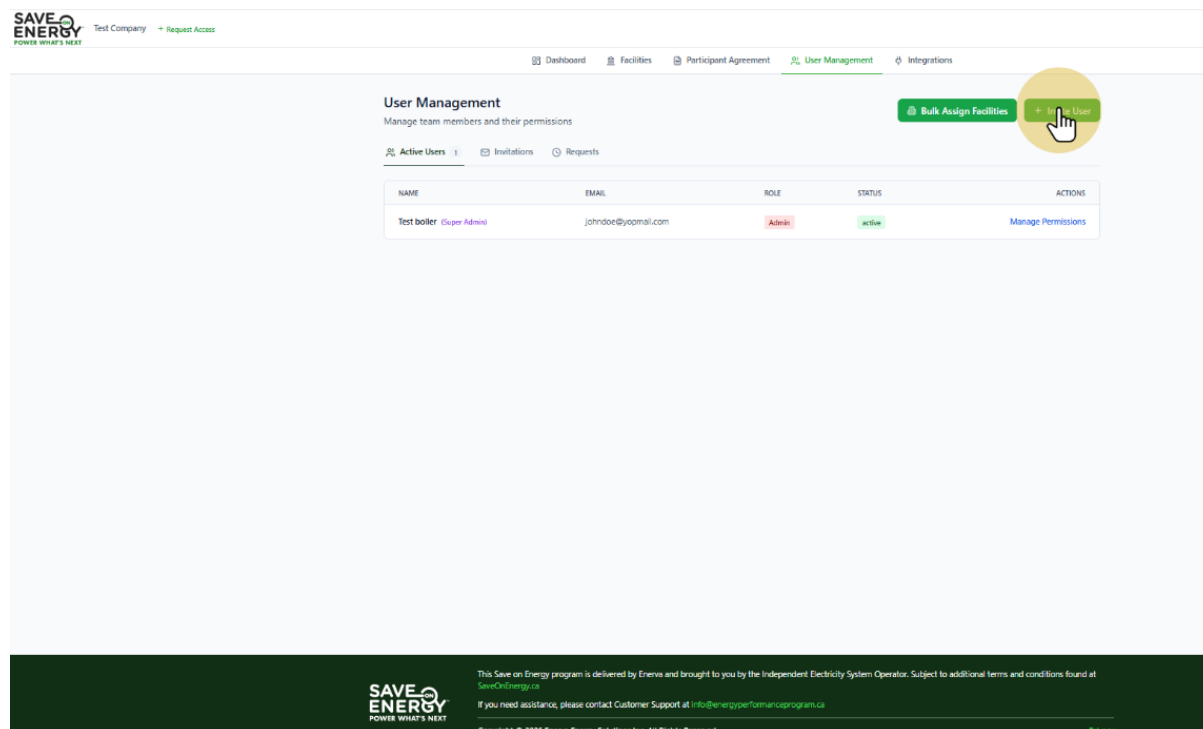
The User Management section is where you manage team members and control their access within the Portal. From this page, you can view all users associated with your company, understand their roles, and manage permissions to ensure the right people have the right level of access.

In this section, you can:

- View active users, including their name, email, role, and current status.
- See who is assigned Super Admin or Admin roles and who has standard user access.
- Manage individual user permissions by selecting Manage Permissions, allowing you to control what each user can view or modify.
- Monitor user status (for example, active users) to maintain proper access control.

11.1 Invite User

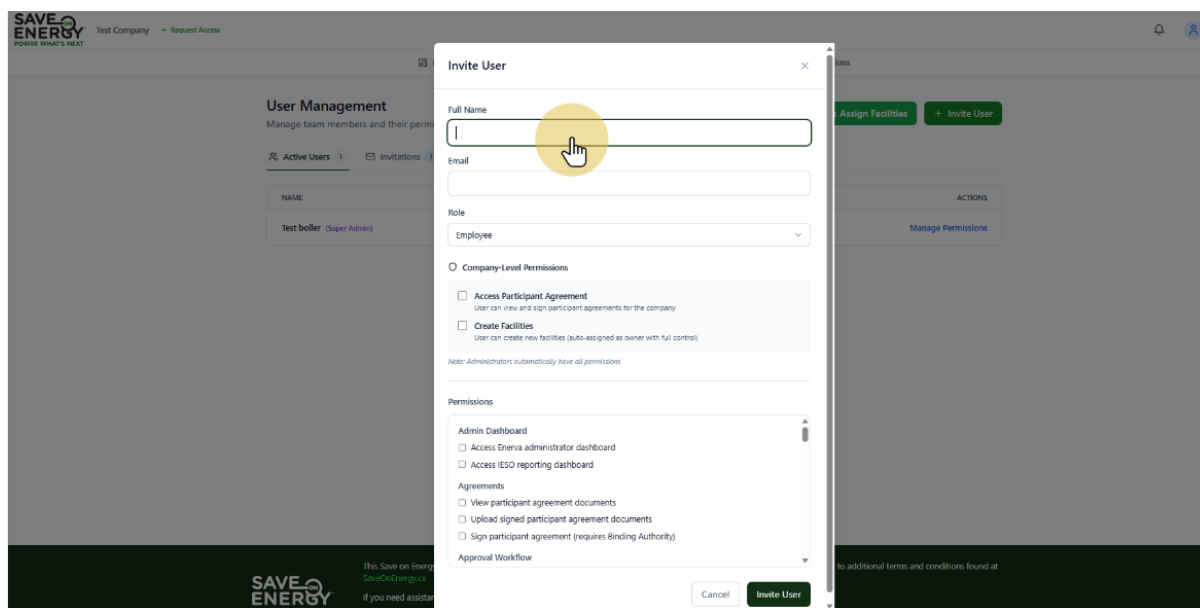
The Invite User button allows you to add new team members to your company. When you click this button, you can send an invitation to a user by email and assign them a role and permissions.



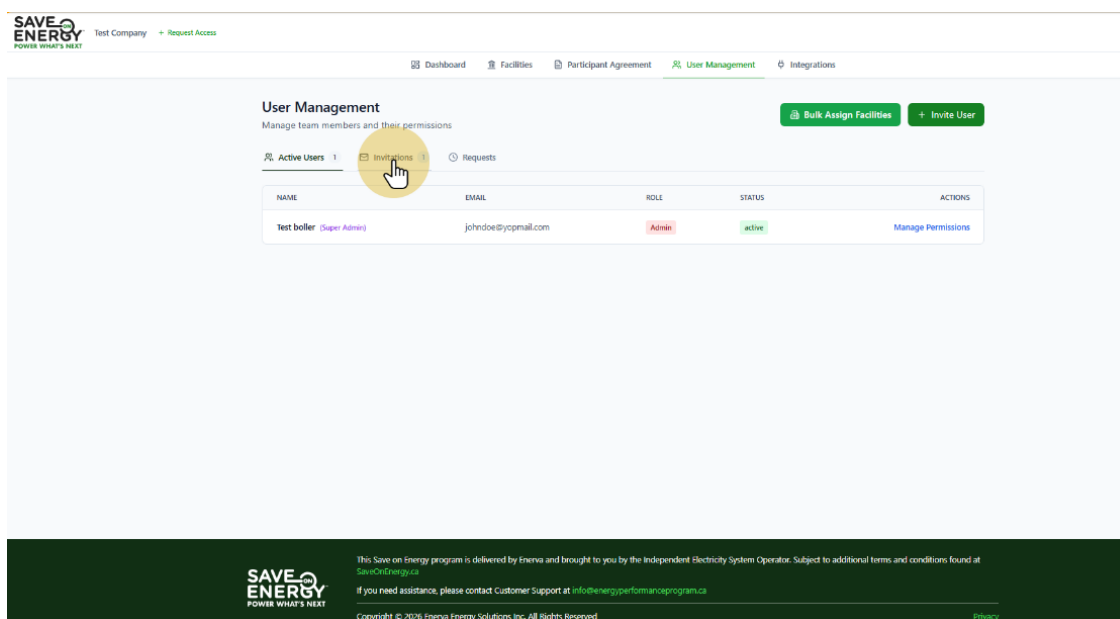
The **Invite User** modal is used to add a new team member to your company in the EPP Portal and define their access level before they join.

In this modal, you can:

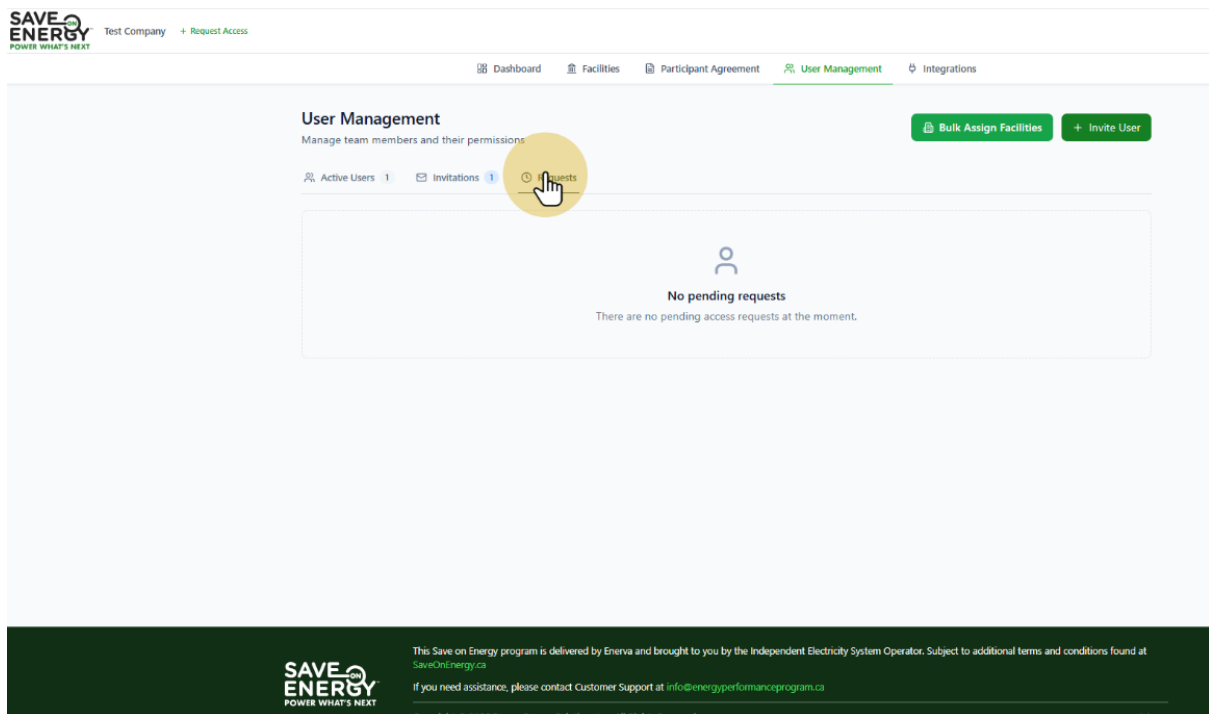
- **Enter the user's full name and email address**, which will be used to send the invitation.
- **Select a role** (for example, Employee or Admin). The selected role determines the user's default level of access.
- **Assign company-level permissions**, such as allowing the user to access Participant Agreements or create and manage facilities.
- **Configure detailed permissions** across different areas of the portal, including:
 - Admin and reporting dashboards
 - Participant agreement actions (viewing, uploading, or signing agreements)
 - Approval workflows and other operational controls



The **Invitations** tab shows all users who have been invited to join your company but have not yet accepted the invitation. This section helps you track the status of pending invites and manage onboarding progress.



The **Requests** tab in User Management is where you review and manage access requests submitted by users who want to join your company in the EPP Portal.



11.2 Bulk Assign Facilities

The Bulk Assign Facilities feature allows you to quickly grant a user access to multiple facilities at once, instead of assigning facilities individually.

In this section, you can:

- Select a user from your company who needs access to facilities.
- Choose an access level (for example, View or Edit) that will apply to all selected facilities.
- Search and select one or more facilities from the list, or use Select All to assign access in bulk.
- Confirm your selection and click Assign Facilities to apply the permissions.

SAVE ENERGY POWER WHAT'S NEXT Test Company + Request Access

Dashboard Facilities Participant Agreement **User Management** Integrations

← Back to User Management

Bulk Assign Facilities

Assign multiple facilities to a user at once

Select User

User Access Level

Select user... View

Select Facilities 0 of 1 selected

Search facilities...

Select All

☐ Facility Kosy
Toronto, Ontario

Cancel Assign 0 Facilities

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Privacy

12 Integrations – Energy Star Portfolio Manager (ESPM)

The Integrations section allows you to sync your Energy Star Portfolio Manager (ESPM) facilities directly into the EPP Portal without having to upload data manually.

12.1 Connect to Energy Star Portfolio Manager (ESPM)

To connect your Energy Star Portfolio Manager (ESPM) account, you must enter your **ESPM username and password** in the fields provided. These credentials are used to authenticate your account and establish a secure connection between ESPM and the EPP Portal.

Once your login details are entered, click **Connect & Preview** to verify the connection. After a successful connection, the portal can access your ESPM facilities and energy data, allowing you to sync them automatically without manual uploads.

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POWER WHAT'S NEXT

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Facilities

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Integrations

Connect external services to sync data automatically

Energy Star Portfolio Manager

Import buildings and sync energy metrics

Back to Overview

1 Connect

2 Preview

3 Import

1

Connect to ESPM

Enter your ESPM Web Services credentials to import buildings.

Request ESPM Web Services Access C?

ESPM Username

Etest

ESPM Password

.....

Connect & Preview

Your credentials are encrypted and stored securely. They are only used to authenticate with the Energy Star Portfolio Manager API.

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12.2 Preview and Select Buildings to Import

Once a connection to Energy Star Portfolio Manager (ESPM) is successfully established, you can **preview the list of buildings** available in your ESPM account.

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Integrations

Connect external services to sync data automatically

Energy Star Portfolio Manager

Import buildings and sync energy metrics

Back to Overview

1 Connect

2 Preview

3 Import

Preview Import

Found 21 properties. Select which ones to import.

New Buildings (20)

Select All Deselect All

☐ EPA Sample Laboratory

(ID: 19546460)

☐ EPA Sample University (including one child building)

(ID: 19546461)

☒ EPA Sample Laboratory

(ID: 19546462)

☐ EPA Sample University (including one child building)

(ID: 19546463)

☐ EPA Sample Laboratory

(ID: 19546464)

Already Imported (1)

EPA Sample University (including one child building) (ID: 19546465)

Back

Importing...

Save your password?

Your password will autofill the next time and will be saved to your Microsoft account

Username

Etest

Password

.....

Save

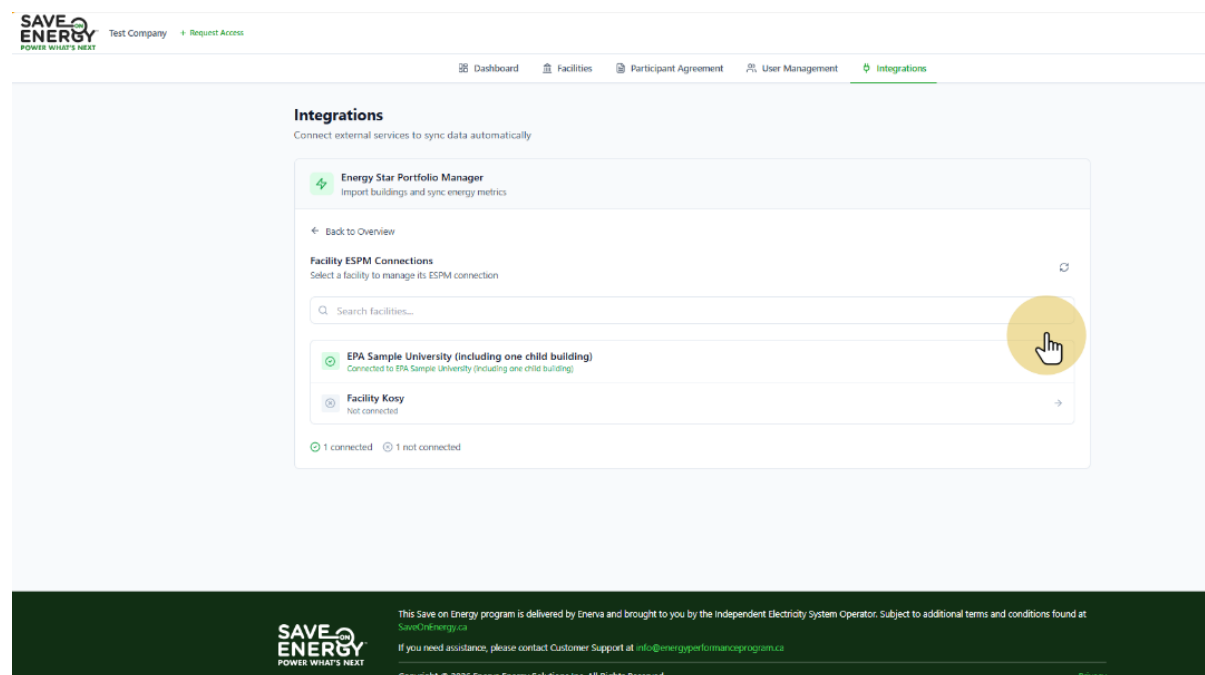
Not now

12.3 Facility ESPM Connections Overview

This section shows you a list of all your facilities and their current connection status with Energy Star Portfolio Manager (ESPM).

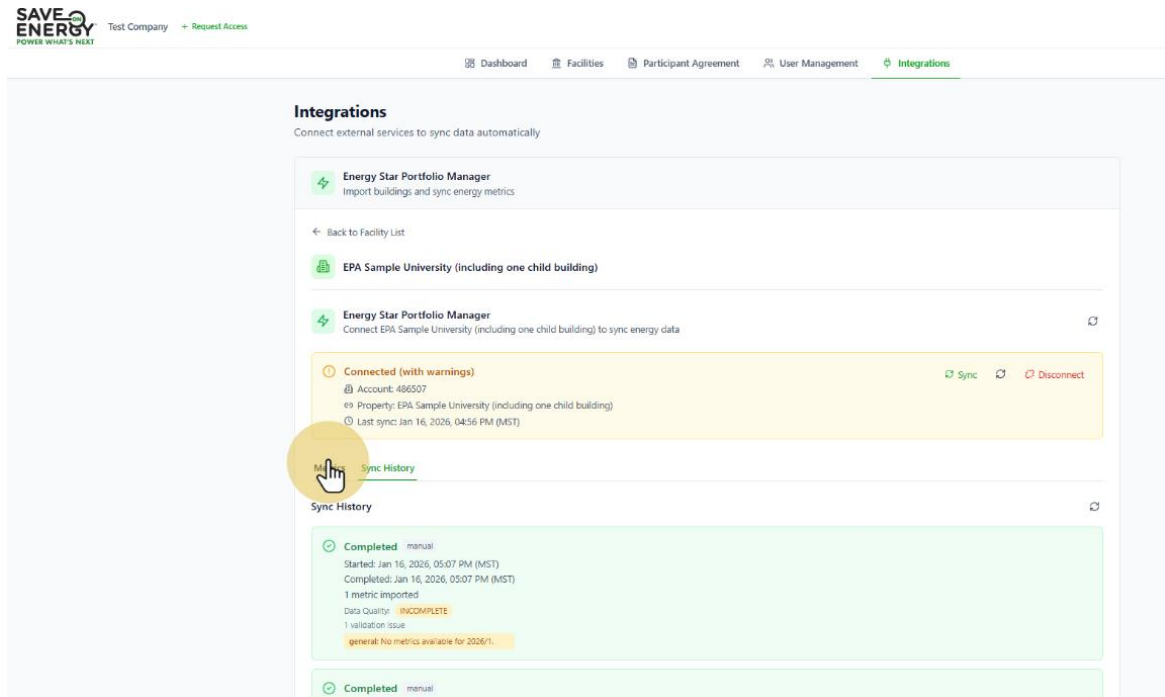
Here, you can:

- View facilities that are **connected** to ESPM
- See facilities that are **not connected yet** and require setup
- Use the search bar to quickly find a specific facility



12.4 Facility ESPM Connection Status & Sync History

This section shows you the detailed connection status between a specific facility and Energy Star Portfolio Manager (ESPM), along with a record of past sync activity.



13. Request Company Access Form

This part of the platform allows you to **request access to join a company** on the portal. Here's how it works

- **Select Company:** You choose the company you want to join from the dropdown list.
- **Requested Role:** You pick the role you're requesting—like Employee, Consultant, or Member. Each role has different levels of access.
- **Optional Message:** You can add a message explaining why you'd like to join the company if you want to give a bit more context.
- **Submit Request:** Once you fill this out and hit submit, the company administrator will review your request and decide on your access.

SAVE ENERGY

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Request Company Access

Request to join a company on the platform. A company administrator will review your request.

Submit New Request

Select Company *

Choose a company...

Requested Role *

Employee
Company employee with facility-specific access

Member
Basic company member with view access

Consultant
External consultant with facility-specific access

Message (Optional)
Explain why you'd like to join this company...

Submit Request

My Requests

You haven't submitted any requests yet.

14. Customer Support

If you need any help, please contact us at EPP Support at info@energyperformanceprogram.ca or 1-888-852-2440 (Monday to Friday 9am-5pm EST).

Energy Performance Program (EPP) Portal User Guide Version 1 January 15th 2026

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