

REQUIREMENT DOCUMENTATION FOR UTILITY BILLS

Low Carbon Pathways



Projects must submit utility documentation at Milestone 1 and update it to reflect installed conditions at Milestone 3. A checklist is provided, but please read the full details before submitting documentation.

QUICK CHECKLIST

Meter/Fuel Type	Required Submission	Notes
All Master Meters (Electricity & Gas) & Common Area Meters	Complete the JotForm Data Release Authorization	Covers all natural gas and electricity master/house meters. Link: https://nyserda.jotform.com/team/operations/MPPLCPDRAF
Bulk Fuels (Oil, etc.)	Two years of complete delivery records	Acceptable submissions include electronic or scanned documents such as individual delivery tickets, invoices, or account summaries including the following: • Records must include delivery date, amount of fuel delivered on each delivery date, Units of measure (e.g., gallons, pounds, MMBtu, etc.), and service address.
District Steam	Two years of billing records	
Apartment Direct-Meters (Except for Cooking Gas)	<ul style="list-style-type: none"> Con Ed territory: Building Energy Use Portal All other utilities: JotForm Data Release Authorization 	<ul style="list-style-type: none"> Con Ed territory – establish a connection with NYSERDA in Con Ed’s Building Energy Use Portal (see specifics below) All other utilities - at least 10% of each size (e.g. 1- bedroom, 2- bedroom, etc.) of direct metered apartments with a minimum of 7 total for each building (https://nyserda.jotform.com/team/operations/MPPLCPDRAF)

FULL DETAILS FOR ITEMS IN QUICK CHECKLIST

Master meters and other “house” meters

A person who has the authority over the building’s utility bills should fill out the Data Release Authorization here: <https://nyserda.jotform.com/team/operations/MPPLCPDRAF> All master meter and “house” meter accounts must be included. Note that the link provides a way to upload multiple account numbers at once, so that the applicant only needs to fill out the form one time regardless of how many meters there are in the building.

When filling out JotForm, include the account number for every natural gas master meter and every electricity master meter, including meters serving the following areas of the property:

- Residential common areas.
- Laundry facilities intended for the residences.
- Offices for staff that serve the residential property, such as rental offices, management offices, or maintenance offices and maintenance shops, including stand-alone buildings for these purposes.
- Stand-alone buildings that provide amenities intended for use by the residents.
- Swimming pools intended for residential use.
- Any other residentially associated spaces or loads.

Individual apartment utility accounts for all utilities EXCEPT Con Ed

Every direct-metered project must also arrange for a sample of tenants to fill out the JotForm Data Release Authorization. The minimum sample is at least 10% of each size of apartment (minimum of 7 total).

Specifically, the minimum sample requirements are as follows:

1. A separate minimum sample must be provided for each of the following five categories of residential units:

- Studio units
- 1-bedroom units
- 2-bedroom units
- 3-bedroom units
- 4-bedroom units and larger

2. For each category above, the minimum required sample is 10% of the total units of that category on site, up to a minimum sample of eight (8) units per category. For example, if there are more than 80 two-bedroom units at the property, then the minimum required sample of two-bedroom units is 8 units.
3. If there are 5 to 10 units of a given category on site, the minimum required sample is 1 unit of that category. If there are 1 to 4 units of a given category on site, please still attempt to obtain a Data Release Authorization for at least one unit from this category.
4. For small projects: All requirements stated above still apply. Additionally, the total number of Data Release Authorizations for direct-metered residential units shall not be less than 7 for the entire project site. This may require the sample to be larger than 10% for some or all residential unit categories in a small project. See “Project B” in the table below for an example.

The following table shows the minimum sample requirements for two example buildings:

Unit Category	Project A		Project B	
	Total Units on Site	Minimum Sample	Total Units on Site	Minimum Sample
Studio	3	0 or 1	0	0
1-Bedroom	120	8	15	4
2-Bedroom	78	8	10	3
3-Bedroom	13	1	0	0
4-Bedroom	5	1	0	0
TOTAL:	219	18 or 19	25	7

Larger sample sizes typically increase the accuracy of the measurable savings achieved at a property. Therefore, as many Data Release Authorizations should be submitted as possible.

Note on submetered tenant accounts: For projects that have a master meter that is also submetered for individual residential unit usage, submitting the submetering records is not required, but a Data Release Authorization for the primary electricity master meter is required.

Aggregate data files (for buildings in Consolidated Edison territory)

In Con Ed territory for properties with direct-metered residential units, NYSERDA prefers that in lieu of providing Data Release Authorizations for individual residential unit accounts, projects share their data with NYSERDA via ConEd’s Building Energy Use Portal (BEUP). This will reduce the burden on management to find tenants willing to fill out JotForm to release their data to NYSERDA. It will also increase accuracy of the analysis.

If it is not feasible to share data via the BEUP, then Data Release Authorizations must be submitted for a 10% sample of individual residential unit meters as outlined above.

In order to share data via the BEUP, the building must have an Energy Star Portfolio Manager account, and that account must have been shared with Con Ed. Mahmud Burton (mahmud.burton@nyserdera.ny.gov) will contact the authorized person to finalize the sharing of data.

Please note: Even if data is shared via the BEUP, Data Release Authorizations (via JotForm) are required for all common area meters and master meters as outlined above.

Gas meters that serve only residential unit cooking appliances

If the gas meters serve only the cooking equipment in the residential units, then it is not necessary to submit Data Release Authorizations or share aggregated data via Con Ed’s BEUP for the direct-metered gas.

Temporary Additional Requirement for NYC Buildings using National Grid Gas

As of October 2024 and until further notice, please submit Downstate National Grid gas data for buildings located in Brooklyn and Queens via Energy Star Portfolio manager. Please share your building with NYSERDA’s Portfolio Manager account by searching for user name mahmud_burton.