

# Welcome!

Mass Energy Insight – Training Session 7:  
**Troubleshooting (2 of 2)**



# Introductions

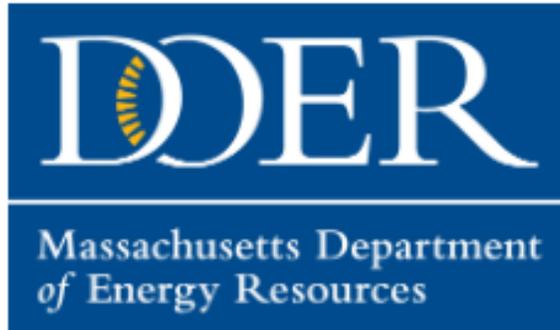
## Presenters:

- Dugan Becker – Clean Energy Extension (CEE)
- Mary Kraus – CEE

## Additional Facilitators / Resource People:

- John Snell – CEE Consultant
- Gamaliel Lodge – Optimiser
- Joanne Bissetta – Department of Energy Resources (DOER)
- Chelsea Kehne – DOER

# Who We Are



UMassAmherst

# What you will learn:

- Correction Bills – What they are, and how to deal with them
- Common Questions about Municipal Building Stock
- How to rectify “Null” items/accounts

**First Topic:**  
Correction Bills

# What is a Correction Bill, and why do they occur?

- A correction bill is essentially a bill issued by a utility company, to account for an error in a previous bill
  - These can be errors in the usage values, cost values, demand values, etc.
- Correction bills can occur for a wide variety of reasons, including:
  - Miscalibrated meters
  - Infrequent meter reading
  - Miscategorized billing rates
  - Etc.
- Some corrections are relatively minor, and some are quite significant

# Why do Correction Bills matter in MEI?

- When a correction bill is issued, they cause double counting in MEI, resulting in artificially high usage totals for the affected account.
- How do Correction Bills cause double counting?
  - When a correction bill arrives to “correct” a previously supplied record, that original record is not automatically removed/overwritten, so you end up with two bills for the affected months.
- Lets take a look at some examples...

Add Use

Displaying usages 41 - 60 of 179 in total

« Previous 1 2 3 4 5 6 7 8 9 Next »

From Date	To Date	Use (Therms)	Use (ccf)	Cost - Utility	Cost - Competitive supplier	Price ↕ Competitive Supply	Read Type	Days	Rate Class		
2017-03-10	2017-04-11	217	211	142.93				32	951		
2017-02-09	2017-03-10	195	189	128.57				29	951		
2017-01-11	2017-02-09	198	192	130.30				29	951		
2016-12-12	2017-01-11	212	206	138.94				30	951		
2016-11-09	2016-12-12	207	201	137.71				33	951		
2016-10-12	2016-11-09	154	150	99.30				28	951		
2016-09-12	2016-10-12	147	143	94.45				30	951		
2016-08-11	2016-09-12	145	141	94.62				32	951		
2016-07-13	2016-08-11	132	128	86.06				29	951		
2016-06-30	2016-07-13	60	58	39.00				13	951		
2016-05-06	2016-06-30	268	261	172.39				55	951		
2016-05-06	2016-06-10	176	171	112.54				35	951		
2015-11-04	2016-05-06	444	431	323.01				184	951		
2016-03-11	2016-04-13	213	207	124.13				33	951		
2016-02-10	2016-03-11	215	208	123.47				30	951		
2016-01-12	2016-02-10	212	206	121.43				29	951		
2015-12-10	2016-01-12	217	211	126.12				33	951		
2015-11-04	2015-12-10	220	214	129.28				36	951		
2015-04-13	2015-11-04	842	819	553.19				205	951		
2015-09-11	2015-10-09	137	133	87.39				28	951		



From Date	To Date	Use (Therms)	Use (ccf)	Cost - Utility	Cost - Competitive supplier	Price ↕ Competitive Supply	Read Type	Days	Rate Class		
2018-11-05	2018-12-07	159	154	114.23				32	951		
2018-10-08	2018-11-05	138	134	97.40				28	951		
2018-09-06	2018-10-08	135	131	97.66				32	951		
2018-08-07	2018-09-06	72	70	59.85				30	951		
2018-07-09	2018-08-07	8	8	24.42				29	951		
2018-06-08	2018-07-09	142	138	101.12				31	951		
2018-05-29	2018-06-08	50	49	35.06				10	951		
2016-05-06	2018-05-29	3190	3101	2,227.88				753	951		
2018-03-12	2018-04-11	202	196	136.24				30	951		
2018-02-09	2018-03-12	201	196	136.19				31	951		
2018-01-11	2018-02-09	205	199	137.46				29	951		
2017-12-12	2018-01-11	234	227	155.20				30	951		
2017-11-09	2017-12-12	213	207	144.41				33	951		
2017-10-11	2017-11-09	149	145	101.64				29	951		
2017-09-12	2017-10-11	135	131	92.63				29	951		
2017-08-10	2017-09-12	151	147	103.96				33	951		
2017-07-13	2017-08-10	128	125	88.14				28	951		
2017-06-12	2017-07-13	141	137	97.18				31	951		
2017-05-11	2017-06-12	164	160	110.60				32	951		
2017-04-11	2017-05-11	164	160	108.65				30	951		

# Correction Bills – An Example:

From Date	To Date	Use (Therms)	Use (ccf)	Cost - Utility	Cost - Competitive supplier	Price ↕ Competitive Supply	Read Type	Days	Rate Class		
2015-11-04	2016-05-06	444	431	323.01				184	951		
2016-03-11	2016-04-13	213	207	124.13				33	951		
2016-02-10	2016-03-11	215	208	123.47				30	951		
2016-01-12	2016-02-10	212	206	121.43				29	951		
2015-12-10	2016-01-12	217	211	126.12				33	951		
2015-11-04	2015-12-10	220	214	129.28				36	951		

Usages  
being  
double  
counted

Actual usage for 11/04/15 – 05/06/16 period: **444 Therms**

Current usage for 11/04/15 – 05/06/16 period reported in MEI: **1,521 Therms**

Excess of **1,077 Therms** reported in MEI!

## How do you fix this error?

# Correction Accounts (“C- Accounts”):

- A correction account (also known as a C- Account), is a secondary utility account that can be used to modify flawed values reported in your primary utility account
  - Since users can't edit data loaded into MEI by utility companies, C- accounts serve as an opportunity to make revisions without messing with the original data.
- C- accounts are created by adding a new account, formatted with a prefix of “C-” and then the original account number
  - For example, if you are addressing a correction bill in account #1234, create a new account with the number: C-1234
  - Provider should be “Other”

# How are C- Accounts used?:

C- Accounts can serve many purposes:

- Adding usages that were not reported in MEI
- Distributing lumped usages
- Removing erroneous/double counted usages, by inserting negative values

However...

- **C- Accounts aren't always the answer!**
- Data in C- accounts gets counted just as any other account in MEI, so please **be careful to ensure that any data you enter is accurate!**
- If you aren't sure, or need help – Reach out to MEI Support

# Fixing Correction Bills in MEI

There are multiple approaches to fixing correction bills, dependent on the context of the correction...

# Fixing Correction Bills in MEI

Ask yourself the following questions:

- Does the correction bill fall within one fiscal year, or does it have days in multiple fiscal years?
- Is the difference between the correction amount and the original bills large or small?
- Does the account in question have significant heating or cooling loads?

Is the difference between the correction amount and the original bills large or small?

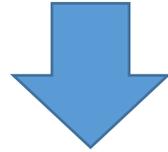
**Small**

- 1) Copy and paste the correction bill and the original bills that it replaces into a spreadsheet.
- 2) Replace the correction bill usage and cost values with the sum of the original bills, as **negative** values.
- 3) Create a C- account, and upload this spreadsheet to that account.
- 4) Contact Support to delete your original bills.

Sum =  
618 Therms

From Date	To Date	Use (Therms)	Use (ccf)	Cost - Utility	Cost - Competitive supplier	Price ↕ Competitive Supply	Read Type	Days	Rate Class
2019-11-30	2020-03-29	827		7,873.04			A	123	<a href="#">Click to edit</a>
2020-01-30	2020-02-29	212		2,018.24			E	30	<a href="#">Click to edit</a>
2019-12-30	2020-01-29	205		1,951.60			E	31	<a href="#">Click to edit</a>
2019-11-30	2019-12-29	201		1,913.52			E	31	<a href="#">Click to edit</a>

Sum =  
\$5883.36



	A	B	C	D	E	F	G	H	I	J
1	Account Number	From Date	To Date	Use (Therms)	Use (ccf)	Cost - Utility	Cost - Competitive supplier	Price ↕ Competitive Supply	Read Type	Days
2	C-12345	11/30/2019	3/29/2020	-618		-5,883.36			A	123
3	C-12345	1/30/2020	2/29/2020	212		2,018.24			E	30
4	C-12345	12/30/2019	1/29/2020	205		1,951.60			E	31
5	C-12345	11/30/2019	12/29/2019	201		1,913.52			E	31

Is the difference between the correction amount and the original bills large or small?

**Large**

**Small**

Does the correction bill fall within one fiscal year, or does it have days in multiple fiscal years?

- 1) Copy and paste the correction bill and the original bills that it replaces into a spreadsheet.
- 2) Replace the correction bill usage and cost values with the sum of the original bills, as a **negative** value
- 3) Create a C- account, and upload this spreadsheet to that account.
- 4) Contact Support to delete your original bills

**Multi. FY**

**1 FY**

Does the account in question have significant heating or cooling loads?

Reach out to support, who will delete original bills, leaving an accurate total but a gap in your data (unless you have a means of distributing the lumped sum).

**Yes**

**No**

Reach out to support, we will calculate how to distribute the correction bill.

- 1) Divide the corrected usage into one record for each FY, according to the # of days in each FY.
- 2) Create a C- account, and enter those values.
- 3) Reach out to Support, who will delete original bills.

# How do I determine if a Correction is “Small” or “Large”?

1. Subtract the sum of your original bills from the correction bill:

From Date	To Date	Use (Therms)	Use (ccf)	Cost - Utility	Cost - Competitive supplier	Price ↕ Competitive Supply	Read Type	Days	Rate Class
2019-11-30	2020-03-29	827		7,873.04			A	123	<a href="#">Click to edit</a>
2020-01-30	2020-02-29	212		2,018.24			E	30	<a href="#">Click to edit</a>
2019-12-30	2020-01-29	205		1,951.60			E	31	<a href="#">Click to edit</a>
2019-11-30	2019-12-29	201		1,913.52			E	31	<a href="#">Click to edit</a>

Sum =  
618 Therms

827 Therms  
- 618 Therms  
209 Therms

2. Does the remaining balance seem to be a reasonable total for the final month?

- Use your best judgement, or compare to a record for that month in a previous year

Is the difference between the correction amount and the original bills large or small?

**Small**

- 1) Copy and paste the correction bill and the original bills that it replaces into a spreadsheet.
- 2) Replace the correction bill usage and cost values with the sum of the original bills, as a **negative** value
- 3) Create a C- account, and upload this spreadsheet to that account.
- 4) Contact Support to delete your original bills

# Correction Bills – An Example:

From Date	To Date	Use (Therms)	Use (ccf)	Cost - Utility	Cost - Competitive supplier	Price ↕ Competitive Supply	Read Type	Days	Rate Class		
2015-11-04	2016-05-06	444	431	323.01				184	951		
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2016-02-10	2016-03-11	215	208	123.47				30	951		
2016-01-12	2016-02-10	212	206	121.43				29	951		
2015-12-10	2016-01-12	217	211	126.12				33	951		
2015-11-04	2015-12-10	220	214	129.28				36	951		

Usages  
being  
double  
counted

Actual usage for 11/04/15 – 05/06/16 period: 444 Therms

Sum of original bills: 1077 Therms

444 Therms  
- 1077 Therms

-633 Therms = Not a realistic usage for the final month

Is the difference between the correction amount and the original bills large or small?

**Large**

Does the correction bill fall within one fiscal year, or does it have days in multiple fiscal years?

**Multi. FY**

**1 FY**

Does the account in question have significant heating or cooling loads?

**Yes**

**No**

Reach out to support, we will calculate how to distribute the correction bill.

Reach out to support, who will delete original bills, leaving an accurate total but a gap in your data (unless you have a means of distributing the lumped sum).

- 1) Divide the corrected usage into one record for each FY, according to the # of days in each FY.
- 2) Enter those values in a C- account.
- 3) Reach out to Support, who will delete original bills.

# Recap: Fixing Correction Bills in MEI

## Identifying Correction Bills:

- Keep an eye out for values greater than ~1 month in the “Days” column
- Look for From Date / To Date combinations that span more than 1 month, and cover periods already reported in MEI.
- Verify usages listed in MEI with your hardcopy bills

## Fixing Correction Bills:

- Refer to the Decision Tree
- Reach out to MEI Support for Guidance

**Next Topic:**

Common Questions about Building Stock

# Common Questions about Building Stock

Common themes:

- Recently Acquired Buildings
- Recently Constructed Buildings
- Recently Closed Buildings
- Recently Renovated Buildings

# Building Stock – Recently Acquired Buildings

Scenario: Your town recently acquired a new building, after your baseline year.

Key questions:

- Is the new building replacing an old building that was included in your baseline year usage?
  - If Yes – This building needs to be entered in MEI, and included in your annual report (AR). You will also want to mention this replacement in your AR narrative.
  - If No – The building should be entered into MEI, and usage should be recorded, but it does not need to be included in your AR. You can exclude a building from reports in MEI by utilizing the “Exclude from Baseline” option.

## Information

To add or edit information on this screen, click on the text in the boxes below, or on blue link below the text. Your additions and edits will be saved automatically. No need to click a Save button.

Type	Facility
Address 1	<a href="#">Click to edit</a>
City	<a href="#">Click to edit</a>
Zip	<a href="#">Click to edit</a>

Address 2	<a href="#">Click to edit</a>
State	<a href="#">Click to edit</a>

* Gross Floor Area (Sq ft)	<a href="#">Add, edit, or view detailed history</a>
Notes	<a href="#">Add, edit, or view notes</a>

Occupants	<a href="#">Add, edit, or view detailed history</a>
Interventions	<a href="#">Add, edit, or view detailed history</a>

* Category	<a href="#">Click to edit</a>
* Subcategory	<a href="#">Click to edit</a>
* School Type	<a href="#">Click to edit</a>
Portfolio Manager Sync	<a href="#">Click to edit</a>
WWTP Nutrient Removal	<a href="#">Click to edit</a>
DWTP Water Source	<a href="#">Click to edit</a>
Exclude from Baseline?	<a href="#">-N/A-</a>
Exclude from ESCO?	<a href="#">-N/A-</a>
Year Built	<a href="#">Click to edit</a>
PM Primary Function Type	<a href="#">Click to edit</a>

# Building Stock – Recently Acquired Buildings

Scenario: Your town recently acquired a new building, after your baseline year.

Key questions:

- Is the new building replacing an old building that was included in your baseline year usage?
  - If Yes – This building needs to be entered in MEI, and included in your annual report (AR). You will also want to mention this replacement in your AR narrative.
  - If No – The building should be entered into MEI, and usage should be recorded, but it does not need to be included in your AR. You can exclude a building from reports in MEI by utilizing the “Exclude from Baseline” option.
- Do you hope to obtain Green Communities grant funding to make alterations to this building?
  - If Yes - This building needs to be entered in MEI, and included in your annual report (AR).
  - If No – The building should be entered into MEI, and usage should be recorded, but it does not need to be included in your AR. You can exclude a building from reports in MEI by utilizing the “Exclude from Baseline” option.

# Building Stock – Recently Constructed Buildings

Scenario: Your town recently built a new building, after your baseline year.

Solution:

- The building should be entered into MEI, and usage should be recorded, but it should not be included in your annual usage totals. You can exclude a building from reports in MEI by utilizing the “Exclude from Baseline” option.
- New construction is not eligible for Green Communities grant funding
- Usage associated with new construction needs to be reported in a separate section of your Annual Report.

# Building Stock – Recently Closed Buildings

Scenario: Your town recently closed/sold a building, after your baseline year.

Solution:

- Step 1 - Mark the accounts for this facility as “Inactive”.

Show accounts within the tree

- Sampleville(City, Town, or Reg. Entity)
  - Administration(Department)
    - Administrative Complex(Complex)
      - Administrative Vehicles(Facility)
      - Town Clerk(Facility)
      - Town Hall(Facility)
        - 1246571068(Account)
        - 1461354020(Account)
        - 53467(Account)

CREATE NEW  
CREATE NEW  
CREATE NEW  
CREATE NEW  
CREATE NEW  
CREATE NEW

**INFO** | **ASSIGN/REASSIGN** | **COMPETITIVE SUPPLY** | **USE**

To add or edit account information, click on the text in the boxes below.  
Some editing features are deactivated for account data received directly from the utility.

### Account Info

Account Nickname	<i>Click to edit</i>	Fuel Type	Electric
Provider	Sampleville Municipal Electric	Notes	<i>Click to e</i>
Account Num	1246571068	Rate Code	
Active?	<input type="text"/> <input type="text"/> <input type="text"/>	Service Street1	<i>Click to e</i>
Meter	<i>Click to edit</i>	Service Street2	<i>Click to e</i>
		City	<i>Click to e</i>

# Building Stock – Recently Closed Buildings

Scenario: Your town recently closed/sold a building, after your baseline year.

Solution:

- Step 1 - Mark the accounts for this facility as “Inactive”.
  - Do not remove this facility from your organizational tree, or exclude from baseline. Your historical data is accurate and valuable.
- Step 2 - Was this building replaced by a new building?
  - If Yes - That new building needs to be entered into MEI, and included in your annual report.
  - If the employees were relocated to an existing municipal building - Continue recording usage in that building, you will be credited with a reduction in energy & more efficient use of space.
  - If none of the above – Move on to Step 3
- Step 3 - Include a comment in your AR narrative, explaining that this building is no longer a part of your town’s building stock.

# Building Stock – Recently Renovated Buildings

Scenario: Your town recently expanded a building through renovations.

Solution:

- If this building was included in your baseline year reporting, it should continue to be reported on.
- In MEI, navigate to this facility's Info tab, and modify the square footage to reflect the building's updated footprint.

**INFO** **ASSIGN/REASSIGN** **ITEMS** **ACCOUNTS**

### Information

To add or edit information on this screen, click on the text in the boxes below, or on blue link below the text. Your additions and edits will be saved automatically. No need to click a Save button.

Type	Facility	Address 2	Click to edit
Address 1	Click to edit	State	Click to edit
City	Click to edit		
Zip	Click to edit		
* Gross Floor Area (Sq ft)	461 <a href="#">Add, edit, or view detailed history</a>	Occupants	<a href="#">Add, edit, or view detailed history</a>
Notes	<a href="#">Add, edit, or view notes</a>	Interventions	<a href="#">Add, edit, or view detailed history</a>

### Areas history

To add building floor area for a given period, click "Update floor area."  
To edit existing floor area information, click the number in the Floor Area column.  
Enter numbers only, no commas.

Areas	Effective from	Effective until	Notes
461	original	current	

[Create New](#)

### Edit Area

Change the area here if the value is incorrect. Then press 'Save'

**Area**  
461

**Effective on**  
 (Leave blank if original)

**Effective until**  
10/15/2020 (Leave blank if current)

**Notes**

[Save](#) [Cancel](#)

### Areas history

To add building floor area for a given period, click "Update floor area."  
To edit existing floor area information, click the number in the Floor Area column.  
Enter numbers only, no commas.

Areas	Effective from	Effective until	Notes
461	original	10/15/2020	

[Create New](#)

### Add new area

Enter information here for a change in area.

**Area**  
620

**Effective on**  
10/15/2020 (Leave blank if original)

**Effective until**  
 (Leave blank if current)

**Notes**

[Save](#) [Cancel](#)

# Building Stock – Recently Renovated Buildings

Scenario: Your town recently expanded a building through renovations.

Solution:

- If this building was included in your baseline year usage report, it should continue to be reported on.
- In MEI, navigate to this facility's Info tab, and modify the square footage to reflect the building's updated footprint.
- Make sure to report this renovation in your Building Stock Narrative

**Next Topic:**

How to rectify “Null” Items in MEI

# What does “Null” mean?

“Null” simply means there is a lack of data.

There are multiple occurrences of “Null” in MEI:

## **UNACCEPTABLE** cases of “Null”:

- Accounts with no usage data
- Accounts not associated with a Department or Facility
- Facilities not assigned a Category/Subcategory

## **ACCEPTABLE** cases of “Null”:

- Accounts not associated with a Complex or Unit
- Accounts without meter numbers \*
- Bill Alerts Report

\* Meter numbers are required for multi-meter accounts only.

# How to Identify and Fix Null Items

To recap:

## **UNACCEPTABLE** cases of “Null”:

- Accounts with no usage data
  - Identify using the Data Loaded Reports
  - If delivered fuel, enter usage data. If IOU, double-check acct number or reach out to Support.



# How to Identify and Fix Null Items

To recap:

## **UNACCEPTABLE** cases of “Null”:

- Accounts with no usage data
  - Identify using the Data Loaded Reports
  - If delivered fuel, enter usage data. If IOU, double-check acct number or reach out to Support.
- Accounts not associated with a Department or Facility
  - Identify using the Data Loaded Reports
  - Relocate accounts to appropriate facility/department



# How to Identify and Fix Null Items

To recap:

## **UNACCEPTABLE** cases of “Null”:

- Accounts with no usage data
  - Identify using the Data Loaded Reports
  - If delivered fuel, enter usage data. If IOU, double-check acct number or reach out to Support.
- Accounts not associated with a Department or Facility
  - Identify using the Data Loaded Reports
  - Relocate accounts to appropriate facility/department
- Facilities not assigned a Category/Sub-category
  - Identify with the Setup Completeness Report
  - Select appropriate category/subcategory on the Facility’s Info Tab

## Setup Completeness Dashboard

These tables show you work you still need to do to set up your city, town or district. Click on an item name to go directly to that item and update it. The item will open in another browser window or tab. You can then make edits which will appear in the reports the next business day. If there's nothing in a table, then you've completed that task!

### Assign these accounts

These accounts have not been assigned to a department, complex, building or unit. Assign these accounts to ensure their data is reported properly.

1	Baltimore Ga..	Electric	
21-45	BWSC	Water	
2009 Town H..	Other	Oil	

### Assign a category to these items

Administrative Office
Fire Station 6
oreilly building
Doiron Hall of Wisdom
College Department
Town Hall
new stuff noot in baseline
Street Lights
Jim B Facility - Fire Station
Vehicles
Vehicles

### Assign a subcategory to these items

Elementary Building
Administrative Office
Ames Juvenile Detention Facility
Fire Station 6
oreilly building
Doiron Hall of Wisdom
cushing
College Department
building 1
Town Hall
new stuff noot in baseline
Wood Pellett Shed

### Enter a square footage for these buildings

Elementary Building
Ames Juvenile Detention Facility
Oreilly Building
cushing
building 1
Wood Pellett Shed
test
Jim B Facility - Police Station
Maynard High
Kennedy Service Building
Broccoli Building
Neals Police Station

This table shows you how many facilities you have created, by facility Category and Subcategory. To expand or collapse click the plus (+) or minus (-) symbols.

### Facility Counts by Type

Facility Category	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	FY 2020
Building	1	2	3	3	3	2
<b>Grand Total</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>2</b>



Thank you for coming!

Any Questions?