

My ENERGY STAR Account Reference Guide

Buildings & Plants Partners

This guide provides instructions to ENERGY STAR® partners and program support organizations on completing common tasks using My ENERGY STAR Account.



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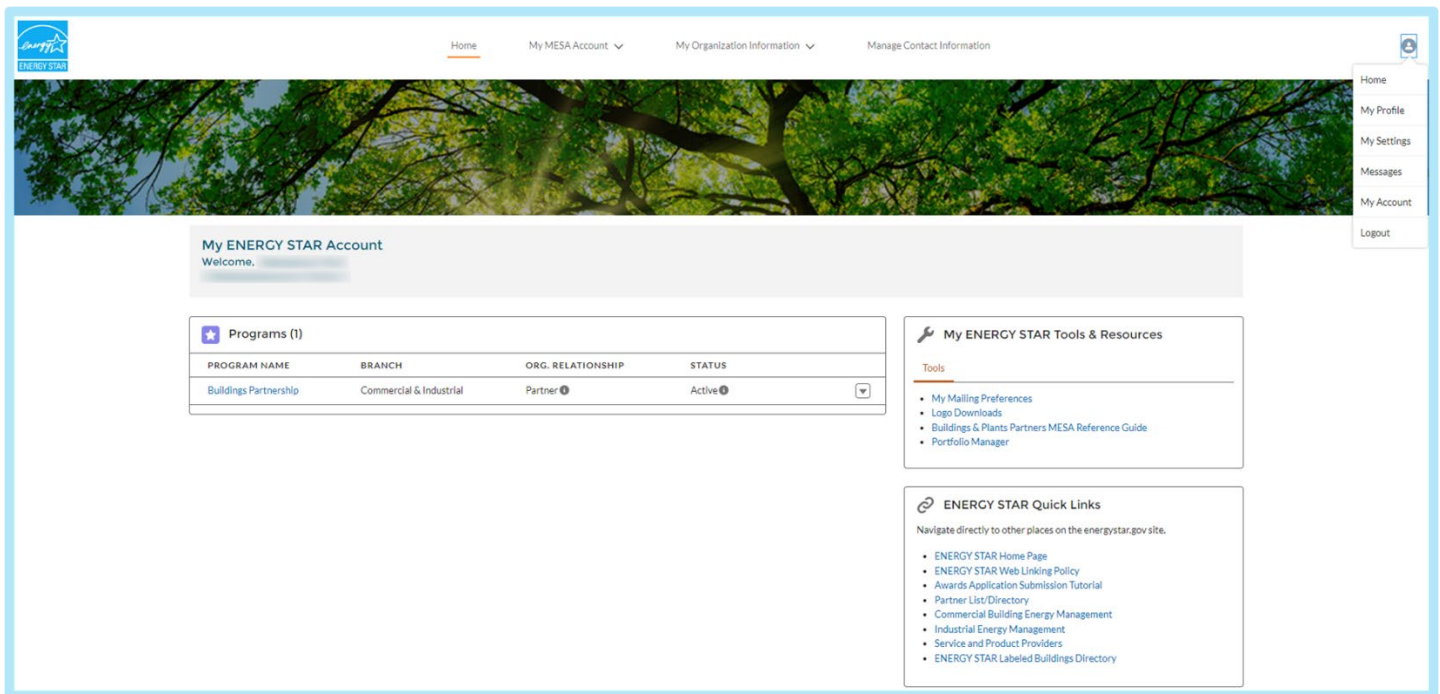
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LOGGING IN

Go to www.energystar.gov/mesa and enter the My ENERGY STAR Account (MESA) username and password you received by email. If you did not receive an email, select the “Forgot your password?” link on the landing page.

You will see a home page similar to this:



PROGRAMS

The Programs section of the MESA home page lists your organization’s involvement in ENERGY STAR programs. It includes details such as the program name, the ENERGY STAR branch that oversees the program, your organization’s relationship with the program, and your organization’s status with the program. An organization can be involved in one or more ENERGY STAR programs.

CONTACTS

The Manage Contact Information section of MESA lists all contacts within your organization. Details are provided for each contact, such as the email address and phone number. Each of your organization’s programs can have one or more contacts associated with it, and you can associate the same contact with one or more programs. To associate a contact with a program, you must assign a program role for the contact. See the following for instructions for this, as well as how to add a new contact, reassign an existing contact to a new program, and remove a contact from a program or from your organization altogether.

MY ENERGY STAR TOOLS & RESOURCES

The My ENERGY STAR Tools & Resources section provides your organization with links to program-specific tools and resources.

ENERGY STAR QUICK LINKS

The ENERGY STAR Quick Links section provides links to relevant program participation information and other places on the energystar.gov site.

YOUR MESA USER PROFILE

Access your MESA user profile information by selecting the user icon in the upper-right corner of the screen. Here you can edit your personal profile, contact information, and other account settings.

My ENERGY STAR Account Reference Guide

Buildings & Plants Partners



ADD A NEW CONTACT

Step 1: From the top menu, select **“Manage Contact Information.”** Click the **“New Contact”** button (on the top right of the list).

The screenshot shows the 'Manage Contact Information' page. At the top, there is a navigation bar with 'Home', 'My MESA Account', 'My Organization Information', and 'Manage Contact Information'. Below the navigation bar, there is a header for 'My ENERGY STAR Account' and 'Manage Contact Information'. The main content area shows a table with 5 contacts. The table has columns for NAME, ORGANIZATION NAME, TITLE, PHONE, EMAIL, MAILING STATE, and CONTACT ROLLUP STA... Each row has a dropdown arrow on the right. A 'New Contact' button is located in the top right corner of the table area.

Step 2: Fill out the **“Create Contact”** page. If the contact should not have access to MESA, uncheck the **“Give contact access to My ENERGY STAR?”** checkbox. Select the program this contact should be added to using the dropdown.

The screenshot shows the 'Create Contact' form. The form is titled 'My ENERGY STAR Account Create Contact'. It has two main sections: 'Contact Information' and 'Contact Role in Program'. The 'Contact Information' section includes fields for Name (Salutation, First Name, Last Name), *Email, Title, Phone (Phone, Phone Ext, Phone Type), Mailing Address (Mailing Country Code, Mailing Street, Mailing City, Mailing State/Province Code, Mailing Zip/Postal Code), and a checkbox for 'Give contact access to My ENERGY STAR?'. The 'Contact Role in Program' section includes a dropdown for 'Select the program this contact should be added to:'. The 'Give contact access to My ENERGY STAR?' checkbox and the 'Select Program' dropdown are highlighted with a yellow circle.

My ENERGY STAR Account Reference Guide

Buildings & Plants Partners



Step 3: Additional fields will automatically populate based on the program selected. Fill out the “**Role in ENERGY STAR Program**”, “**Role in Company**”, and “**Contact Status in Program**”. Add “**Energy-Related Professional Certificates**” if applicable. To select multiple roles or deselect a role, press **Ctrl** and **left-click** simultaneously. Press “**Save.**”

▼ Contact Role in Program

In order to make sure this contact receives relevant information from ENERGY STAR, you must associate them with the appropriate program. If you need to associate them with more than one program, you can do so after saving this form. For more help, refer to https://www.energystar.gov/partner_resources/mesa.

* Select the program this contact should be added to:

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* Role in ENERGY STAR Program

Primary
Communications
Applicant
Signatory

Role in Company

Accounting/Finance
Administrative
Architect
Communications/Marketing/PR

Energy-Related Professional Certificates

Certified Energy Manager (CEM)
Leadership in Energy and Environmental Design (LEED) Certification Pro
Professional Engineer (PE)
Registered Architect (RA)

* Contact Status in Program

Please Select...

Cancel Save Contact

Note: Contacts must have a contact role to receive ENERGY STAR communications.

My ENERGY STAR Account Reference Guide

Buildings & Plants Partners



UPDATING INFORMATION

Viewing and editing organization information

Step 1: Select “My Organization Information” from the top menu, and then “Manage My Organization.”

Step 2: From the “All Organizations” list, select your organization name.

Step 3: On the page for your organization, select “Edit” (at the top right of the screen).

Step 4: Edit your organization’s information (such as address, website, or phone). Press “Save.”

Note: The organization name cannot be edited in MESA. To request a change to your organization’s name, select “My Organization Information” from the top menu, then select “Org Name Change Request.” Complete and submit the form provided. The organization name will be changed once the request has been reviewed and approved by ENERGY STAR.

Edit information for an existing contact

Step 1: Select “Manage Contact Information” from the top menu.

Step 2: Select the relevant contact name from the list to reach the contact page.

Step 3: Press “Edit,” at the top right of the page, to change the contact information.

To change the email address for a MESA user account, the contact will be required to verify the updated email address via email.

Inactivate a contact

MESA does not allow you to delete a contact from the system, but you may inactivate a contact within a program using the following steps:

Step 1: Select the relevant program from the “Home” menu.

Step 2: On the program page, in the “Program Contacts” list, click the arrow on the right side and select “Edit Contact Role” from the drop-down menu.

Step 3: Change the Contact Status to “Inactive” and indicate the reason in the “Inactive Status in Program Explanation – Manual” box. Press “Save.”



Adding or Updating C&I Organization and Plant Types

ENERGY STAR uses organization and plant types to make partners aware of opportunities that are unique to companies that are sector specific.

To add a new C&I Organization Type

Step 1: Go to the Program page (Buildings, Association, or Service & Product Providers programs). In the C&I Organization Types box, click the NEW button on the far right.

Step 2: Complete the information form for C&I Organization Type – Please carefully review the selections available in the Org Type lists.

Step 3: Click Save.

Step 4: Repeat steps 1-3 for each additional organization or plant type that is relevant to your organization

To update an existing C&I Organization or Plant Type

Step 1: In the C&I Organization Types box, click the drop-down arrow to the right of organization type.

Step 2: Select “Edit C&I Organization Type.”

Step 3: Complete the information form for C&I Organization Type– Please review carefully the selections available in the Org type lists.

Step 4: Click Save.

To delete an existing C&I Organization Type

Step 1: In the C&I Organization Types box, click the drop-down arrow to the right of organization type.

Step 2: Select “Delete C&I Organization Type.”

Step 3: Click “Delete” when prompted to confirm.

Note: EPA will provide further guidance as additional features are released in MESA.

For more help, please submit a question at <http://energystar-mesa.force.com/PortfolioManager/s/contactssupport>

Make sure to reference MESA.

My ENERGY STAR Account Reference Guide

Buildings & Plants Partners



Adding or Updating Property Types

To add a new Property Type

Step 1: Go to the Buildings Program page, in the Property Types box and click the NEW button on the far right.

Step 2: Complete the information form for the Property Type— Please review carefully the selections available in the Categories lists.

Step 3: Click “Save.”

Step 4: Repeat steps 1-3 for each additional property type that is relevant to your organization.

To update an existing Property Type

Step 1: In the Property Type box, click the drop-down arrow to the right of a property type.

Step 2: Select “Edit Property Type.”

Step 3: Complete the information form for Property-Type— Please review carefully the sections available in the category’s lists.

Step 4: Click “Save.”

To delete an existing Property Type

Step 1: In the Property Type box, click the drop-down arrow to the right of a property type.

Step 2: Select “Delete Property Type.”

Step 3: Click “Delete” when prompted to confirm.

Adding or Updating C&I SPP Services Offered

To add a new SPP Services Offered

Step 1: Go to the Service & Product Providers Program page, in the C&I SPP Services Offered box and click the NEW button on the far right.

Step 2: Complete the information form for Services Offered – Please review carefully the selections available in the Levels lists.

Step 3: Click “Save.”

Step 4: Repeat steps 1-3 for each additional service your organization offers.

To update an existing SPP Service Offered

Step 1: In the C&I SPP Services Offered box, click the drop-down arrow to the right of a service.

Step 2: Select “Edit C&I SPP Services Offered.”

Step 3: Complete the information form for Services Offered – Please review carefully the selections available in the Levels lists.

Step 4: Click “Save.”

To delete an existing SPP Service Offered

Step 1: In the C&I SPP Services Offered box, click the drop-down arrow to the right of a service.

Step 2: Select “Delete C&I SPP Services Offered.”

Step 3: Click “Delete” when prompted to confirm.

Note: EPA will provide further guidance as additional features are released in MESA.

For more help, please submit a question at <http://energystar-mesa.force.com/PortfolioManager/s/contactsupport>

Make sure to reference MESA.