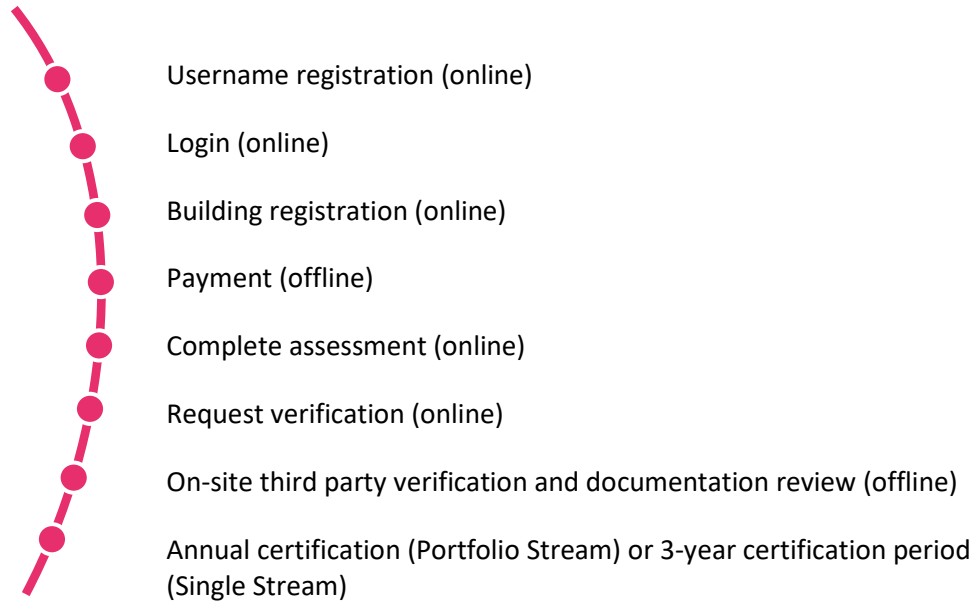




1. Step-by-Step Guide for Users of the BOMA BEST Online Portal

1.1. Process overview

The BOMA BEST process is very use friendly. Simply follow the steps below.



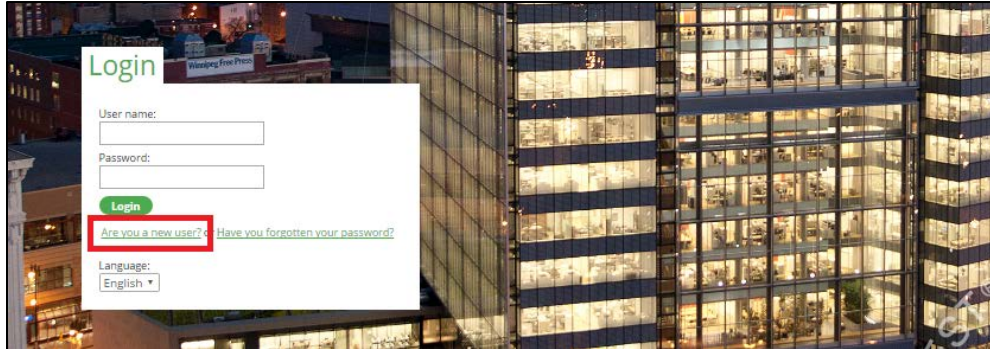


1.2. From Registration to Certification

Step 1: Create a username

Note: Your V2 username and password will **not** work in the 3.0 Online Portal.

- Visit: <https://boma.credit360.com>
- Click on “Are you a new user?” to create your username



- Complete the information requested regarding your company and contact information.

NOTE: For your company name, enter “Company Name-Your Name” (e.g. Management Company A-Jane Smith)

Register your company

Enter your details to register your company on the BOMA BEST Online Portal. NOTE: For your company name, enter “Company Name – Your Name” (e.g. Management Company A – Jane Smith)

Company details

Company name:

this field is required

Country:

- You will receive an email with a link. Click on this link to finalize the registration process. The link is valid for 60 minutes. **Your username is your email address.**
- You can now log in.



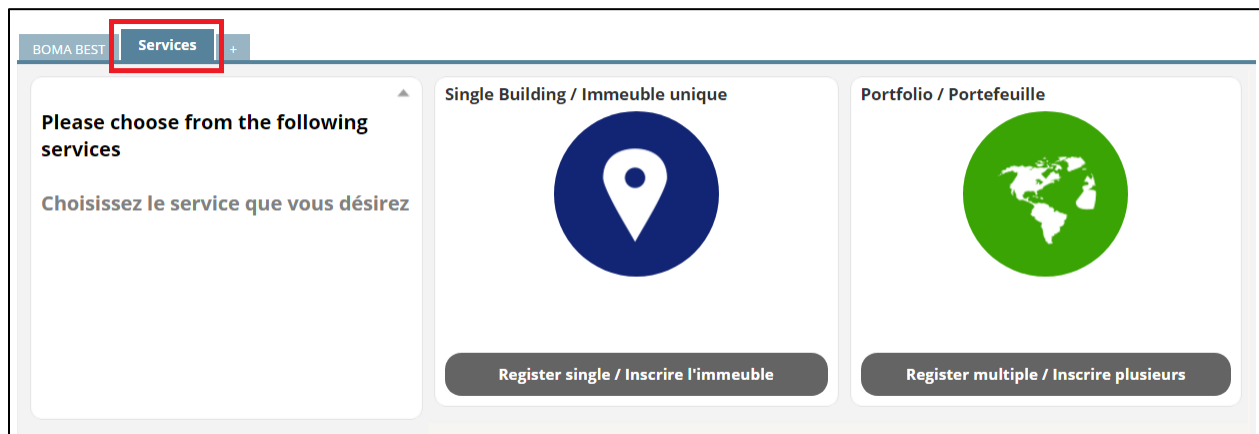
Step 2: Create a building

From the dashboard, click on the Services tab; select whether you would like to register a “Single” building or a “Portfolio” of buildings.

Single Building Stream: Designed for those who prefer to pay a one-time fee for a three year certification. Upon expiry of the building, applicants must pay a new fee for recertification and be verified again. Multiple buildings can be registered (one at a time) via this method.

Portfolio Stream: Designed for applicants who prefer to pay an annual fee for ongoing certification. Certification never expires provided verification is successful and the annual fee is received. A different sample of the portfolio is verified every year.

Depending on your selection, follow the instructions directed to your stream in the remainder of this document.



1. Single Building Stream:

- a. From the Services tab, click on “**Register single**”.
- b. You will be redirected to the “**Create new property**” page.
- c. Complete all required fields in the Summary section

NOTE: See the Tip box on the following page for details on how to complete your information.

- a. Click “**Save**”. Multiple buildings can be created this way, one at a time.

NOTE: Fees for certification do not appear automatically in this step nor is it possible to create an invoice using the Online Portal. Your Local Association will be in touch with your invoice. Fees are based on the building size and asset type. Please visit the [Fee section of the website](#) for exact fees.

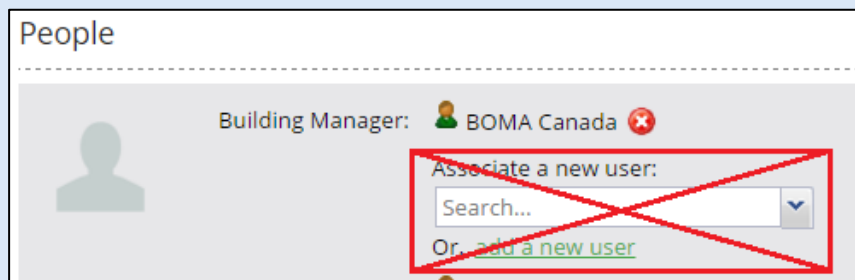
2. Portfolio Stream:

- a. From the Services tab, click on “**Register multiple**”
- b. You will be brought to the “**Documents**” folder where instructions are provided. You will be asked to provide BOMA Canada with a list of your buildings in the specified template.



Tips on creating a new building

- **Property Type:** Refers to the Energy Star Property Type of your building. Pick the descriptor that most closely resembles your building.
- **Questionnaire Type:** Refers to the BOMA BEST questionnaire you will be using to certify. Select the one that most closely fits your building's description. Building descriptions are available in section 2 of this *BOMA BEST Application Guide 3.0*. Select Universal if your building does not match any other asset class.
- **"As of":** This question allows you to track when you make changes to your new building entry. Select "Today" the first time through.
- **Local BOMA Association where the building is located:** Select the Local BOMA Association that is responsible for the region where your building is located. They will be responsible for payment and administration of your certification.
- **BOMA Membership Status where building is located:** If you are a BOMA member in another region, you may not qualify as a member where your building is located. Contact the Local BOMA Association where the building is located to confirm your membership status. This will have an impact on the registration fees.
- **Invoice Details:** Provide the contact information of the person who should receive the registration payment invoice.
- **Energy Star Section:** Return to this section later once you have reviewed the instructions in the BOMA BEST questionnaire pertaining to entering energy and water consumption.
- **People section:** Cannot be modified. If you wish to grant permissions to others to see your building, see section 1.3 of this Guide for instructions on how to proceed.



- Click on **"Fill in more details"** to enter more information about the building.
- **Location section:** Enter your building's address here.



Step 3: Completing information for an imported building

Some buildings have been imported to the Online Portal. Please proceed to Step 4 if this is not the case.

If your building already exists in the system you do not need to register it again, simply provide some of the missing information:

- Log in at <https://boma.credit360.com>
- Click on the “Property”
- Find the property in question (you can use the Search function)

The screenshot shows the 'PROPERTY' tab selected in the navigation menu. Below the navigation bar, there are links for 'My Properties', 'Status', 'Create new', and 'Benchmarking'. The main heading is 'Properties', followed by action links: 'Add property', 'Export to Excel', 'Load/Save report', and 'Clear filter'. A search bar is highlighted with a red box, containing the text 'Search...'. Below the search bar, there are links for 'Add filter criteria', 'Results per page', and 'Select columns'. A table of properties is displayed below, with the following data:

Building Name	ID	Street Address	Town or city	Gross Floor Ar...	Asset type	Status
05. Property D - Test (Regina)	35245776	Property D	Winnipeg	695,241	Office	New

- Click the property’s name
- You are now on the “Property Characteristics” page for this building. This is the building’s homepage.
- Click on “Change”

The screenshot shows the 'Property characteristics' page for 'TEST Office Building #5'. The page title is 'TEST Office Building #5'. Below the title, there is a dashed line. At the bottom of the page, there is a 'Property characteristics' label and a 'Change...' button, which is highlighted with a red box.

- Complete the information that appears in this section. Ensure you have selected the correct questionnaire type. See the Tip box on the previous page for details on how to complete your information.
- Click “Save”

NOTE: Fees for certification do not appear automatically in this step nor is it possible to create an invoice using the Online Portal. Your Local Association will be in touch with your invoice. Fees are based on the building size and asset type. Please visit the [Fee section of the website](#) for exact fees.




Step 4: Payment


NOTE: Payment always occurs offline via your Local Association or BOMA Canada. The “Payment” tab is for administrative purposes only (only BOMA Canada and the Local Association may add/remove entries).

Single Building Stream:

- a. On the building’s Property Characteristics page, click on “**Register building**”.

Property characteristics Change...

	Address:	Canada
	Property Type:	Light Industrial - Distribution
	Gross Floor Area (for ENERGY STAR):	-
	ENERGY STAR Score:	-
	Total GHG emissions:	-
	Water Use Intensity :	-
	Energy Use Intensity:	-

Register building / Inscrire l'immeuble 

- b. Your Local BOMA Association will now receive a notification that you are registering your building for certification. They will be in touch regarding payment. You may be contacted to confirm your building’s details. You will be granted access to the BOMA BEST questionnaire for 60 days while payment is still pending. If payment has not been received after this period, access to your BOMA BEST questionnaire will be removed.
- c. Submit payment to the Local BOMA Association.
- d. Fees are available [here](#) and are invoiced every three years (per certification cycle).

Portfolio Stream:

- a. Once you have submitted the list of buildings to BOMA Canada, you will be contacted directly with information regarding fees for each building as well next steps.
- b. **Do not** click on “**Register building**” (if you are able to see it).
- c. Invoices will be sent based on your preferences (individual building invoicing or group invoicing). Portfolios are invoiced annually.



Step 5: Accessing and completing the BOMA BEST Questionnaire

- From the building's Property Characteristics page, click on the "Questionnaire" tab.
- Click on the questionnaire for your building. A new tab will open.

TEST Office Building #5

Property characteristics [Change...](#)

Address:	Canada
Property Type:	Office - Office
Gross Floor Area (for ENERGY STAR):	-
ENERGY STAR Score:	-
Total GHG emissions:	-
Water Use Intensity:	-
Weather-normalized Site Energy Use Intensity:	-

Certifications **Questionnaire** Payment Spaces Energy Consumed Energy Produced Water

[BOMA BEST 3.0 - Office/Immeuble de bureaux - Submitted](#) -01 to 2021-09-01

TEST Office Building #5

Moved to state Submitted by [Self-registered Building Manager](#) on October 17, 2016

- Once inside the questionnaire, move through each tab, answering each question.
- The "Welcome" tab contains some helpful tips for navigating through the questionnaire.
- The "BEST Practices" tab contains mandatory questions.
- Even if you are not going to answer questions in each tab, click through each tab by clicking "Next". This will allow the system to register all scores so that you are correctly scored.

BOMA BEST 3.0 - Office/Immeuble de bureaux - BOMEX Test Property

[Save answers](#) [Download](#) [Export template](#) [Import](#)

Previous **Welcome** Building Description **BEST Practices** 1.0 Energy 2.0 Water 3.0 Air Quality 4.0 Comfort 5.0 Health and Wellness 6.0 Purchasing 7.0 Custodial 8.0 Waste 9.0 Site 10.0 Stakeholder Engagement Next

- You may leave the questionnaire at any time and return to it by clicking "Save".
- To see your answers, click on the "Submit" button that appears once you are on the last tab. You may do this as often as you like. Don't worry, this does not mean you are ready for verification!

BOMA BEST 3.0 - Office/Immeuble de bureaux - BOMEX Test Property

[Save answers](#) [Download](#) [Export template](#) [Import](#)

Previous Welcome Building Description BEST Practices Energy Water Air Quality Comfort Health and Wellness Purchasing Custodial Waste Site **10.0 Stakeholder Engagement** **Submit**



Step 7: Completing the performance metrics portion of the questionnaire

In BOMA BEST 3.0 you will be asked to report your Energy Use Intensity, ENERGY STAR Score (if applicable) and Water Use Intensity. Depending on the questionnaire you are using, points will be allocated for these values. To obtain these values, it is necessary to enter your consumption data in another part of the site. Calculations are performed automatically via ENERGY STAR Portfolio Manager.

- a. If you have an ENERGY STAR Account for your building already and would like to synchronize it with your BOMA BEST account, follow the instructions provided [here](#).
- b. If you **don't** have an ENERGY STAR account and will be using the BOMA BEST Portal to enter your data, follow the instructions provided [here](#).


Step 8: Requesting and preparing for Verification

Single Building Stream:

- a. Check that you are ready for verification:
 1. All BEST Practices have been answered with “Yes” or “BOMA-Accepted Equivalent”
 2. Documentation demonstrating the BEST Practices has been uploaded for each BEST Practice.
 3. You have clicked through each section of the questionnaire by using the built-in “Next” or “Previous” buttons.
 4. You have submitted your questionnaire by clicking the “Submit” button (only appears when you’ve arrived at the last section of the questionnaire).
- b. From the Property Characteristics page click “**Request Verification**”.

Property characteristics [Change...](#)

Address:	555 Street St. , Calgary
Property Type:	Office - Office
Gross Floor Area (for ENERGY STAR):	357,922 Square Feet
ENERGY STAR Score:	-
Total GHG emissions:	-
Indoor Water Intensity (All Water Sources):	-
Weather normalized Site EUI:	-

[Request Verification / Demande de vérification](#) 

- c. If you clicked this by mistake, you may click “**Cancel Verification**”.
- d. Until the Local BOMA Association has accepted your request you will not have access to your BOMA BEST Questionnaire.
- e. Once the Local BOMA Association has accepted your request you will be able to return to the BOMA BEST Questionnaire and make modifications to your questionnaire. These will not affect the copy that has been made for Verification.
- f. You will be contacted by the Local BOMA Association to schedule the Verification.



- g. A thorough description of the Verification process is available in section 6 of this *BOMA BEST Sustainable Buildings Application Guide 3.0*.

Portfolio Stream:

- a. Contact BOMA Canada to alert them that you are ready for verification.
- b. BOMA Canada will work with you to organize a verification schedule for the buildings eligible for verification.
- c. A thorough description of the Verification process is available in section 6 of this *BOMA BEST Sustainable Buildings Application Guide 3.0*.



Step 9: Certified Buildings

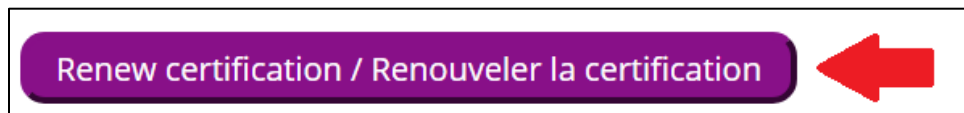
- Once your building has been successfully verified, the Local Association (or BOMA Canada for Portfolio buildings) will update your certification records. A new entry will be entered in the “**Certifications**” tab by an Administrator. Here you will see the certification date, expiry date, level of certification achieved as well as your score.
- Your certification record will also appear in the My Properties List.

Ref	Certification Level	Certification Score	Certification Date	Certification Expiry Date
320725540	Platinum	92	September 25, 2016	September 24, 2019
320725541	Gold	88	August 25, 2013	August 24, 2016

Step 10: Recertification

Single Building Stream:

- Certifications are valid for three 3 years. During this time, you will have ongoing access to the building’s data and BOMA BEST questionnaire. These can continue to be modified during this three-year period.
- You will receive two alerts – 12 months and 4 months from expiry – reminding you of your building’s upcoming expiry. You can recertify at any time by clicking on “**Renew certification**”. The process will begin anew starting at Step 4.



Portfolio Stream:

- Certification is ongoing, unless a building cannot meet the verification requirements or if fees are outstanding.
- There is no need to indicate that you want to renew your certification. BOMA Canada will be in touch regarding Verification at regular intervals.



1.3. Additional functionalities

1.3.1. Adding users to a building

The person who created a building is automatically granted permission to see and modify that building, all its data and applicable BOMA BEST questionnaire.

Any number of users can be added to a particular building. These users will be granted full permission to the building (i.e. can modify the questionnaire, the data entry forms, etc.). Users can be located across the country; they do not need to be in the same region as the building.

If you wish to add another user to a building, email bomabest@bomacanada.ca with the following information:

- The username (these must already exist in the 3.0 Online Portal)
- The name of the building

Depending on the number of buildings and usernames, please allow 2-3 weeks for this to be completed. Let us know in the email if any are more urgent than others.

1.3.2. Creating an overview of all buildings in your account:

It is possible to see all buildings, their status (Certified, Expired, New, etc.), Asset type, location, etc. in one place.

- Click on **“Property”**
- Click on **“My Properties”**
- From here, you will see a Table of all buildings in your account, or all buildings for which you have permission (if you have been manually added to other buildings).
- You can sort your buildings by clicking on **“Add filter criteria”**
- You can export all the results to a PDF by clicking on **“Export to Excel”**

Building Name	ID	Street Address	Town or city	Gross Floor Ar...	Asset type	Status	Management C
05_Property D - Test (Regina)	35245776	Property D	Winnipeg	695,241	Office	New	BOMA Fake Company
06_Test Office Building	41684612	555 Street St.	Calgary	100,000	Office	Not certified / Non certifié	To be assigned users/correct company
07_Test BOMA building (Ottawa)	42801886			1	Health Care	Payment due / En attente de paiement	



1.3.3. Understanding your “BOMA BEST” dashboard

When you first log in, click on “BOMA BEST” to see your dashboard.

The screenshot shows the BOMA BEST dashboard interface. At the top, there is a navigation bar with three tabs: 'DATA ENTRY' (highlighted in green), 'PROPERTY', and 'ADMIN'. Below this, there are links for 'Home', 'Documents', and 'Calendar'. A large heading reads 'Welcome to your home page'. Below the heading, there is a row of buttons: 'BOMA BEST' (highlighted with a red box), 'Services', and a '+' icon. The main content area is divided into two sections. On the left, there is a 'Notes' section with a text input field labeled 'Enter note'. On the right, there is a 'Message from BOMA - Un message de BOMA' section. The message reads: 'Welcome to BOMA BEST 3.0! Bienvenue à BOMA BEST 3.0! This is your homepage. Maybe you'd like to start by creating a new building Step by step instructions are provide [here](#). Voici votre tableau de bord. Peut-être aimeriez-vous commencer par inscrire un nouvel immeuble? Des instructions étape par étape sont disponibles [ici](#).'

This dashboard provides you with an overview of your buildings. It has been created as a template for all users. Some of its features include:

- “Notes”: A place on which to write yourself reminders.
- “My Messages”: Shows all the messages and alerts sent to you via the system, for example in regards to payment or verification.
- “Interactive Map”: Shows all the geographic location of all buildings in your account – provided the location has been specified for each building.
- “Building Types”: This chart provides a summary of all the different buildings types that have been entered in your account.
- “Property Status”: This chart provides a summary of the different status for each building in your account. Through this table you can track which ones are overdue for payment, which ones are in the process of being verified, which ones are certified, etc.
- “My Surveys”: Provides a direct link to all the surveys being completed by your buildings.



1.3.4. Understanding your building' status

Your building' status is visible in many places, on your dashboard. It is also a filter category in the “My Properties” list.

DATA ENTRY		PROPERTY		ADMIN		
My Properties Status Create new Benchmarking						
Properties						
Add property Export to Excel Load/Save report Clear filter						
Search...			Add filter criteria		Results per page Select columns	
Building Name	ID	Street Address	Town or city	Gross Floor Ar...	Asset type	Status
05. Property D - Test (Regina)	35245776	Property D	Winnipeg	695,241	Office	New
06. Test Office Building	41684612	555 Street St.	Calgary	100,000	Office	Not certified / Non certifié
07. Test BOMA building (Ottawa)	42801886			1	Health Care	Payment due / En attente de paiement

Below is a description of what each status means:

- **New:** Your building has just been created. You must now click on “**Register Building**” in order to finalize your registration for a BOMA BEST Sustainable Buildings Certification.
- **Pending:** Single Building stream only. The Local BOMA Association has acknowledged your building’s registration and is reviewing the details.
- **Payment due:** Single Building stream only. The Local BOMA Association has sent you an invoice for your building’s registration. You have 60 days to submit payment. If payment is not received in this time, you will no longer be able to make changes to your online questionnaire.
- **Payment overdue:** Single Building stream only. The Local BOMA Association has not yet received your payment. You no longer have the ability to make changes to the online questionnaire.
- **Full access:** Single Building stream only. Payment has been accepted. Your building has full access to the questionnaire. It is now possible to request verification.
- **Ongoing:** Portfolio Building stream only. Your building has full access to the questionnaire.
- **Verification requested:** Single Building stream only. You have clicked on “**Request Verification**”. The Local BOMA Association has been automatically notified.
- **Awaiting verification:** Both streams. Your verification is being scheduled.
- **Certified:** Both streams. Your building’s verification was successful. The building is now certified for three (3) years. You will continue to have access to the online questionnaire during this time.
- **Not certified:** Both streams. Your building’s verification was unsuccessful. You will have to “**Register Building**” in order to restart the process. You will not lose the answers saved in your questionnaire.
- **Certified (+24 mos):** Single Building stream only. Your building has been certified for over two years and is 12 months away from expiry. You will receive an automatic notification to this effect. You can begin the recertification process at any time; simply click on “**Renew certification**”.



- **Certified (+32 mos):** Single Building stream only. Your building has been certified for nearly three years and is 4 months away from expiry. You will receive an automatic notification to this effect. You can begin the recertification process at any time; simply click on “**Renew certification**”.
- **Expired:** Both streams. Your building’s certification is expired. You will no longer be able to make any changes to your online questionnaire. If you wish to recertify your building, simply click on “**Renew certification**”.