

Portfolio Manager 101 for Senior Communities

Version 1.6

Chapter 1 Overview

Portfolio Manager (PM) is a **free** program from the US Department of Energy. From their website: “Portfolio Manager is an interactive resource management tool that enables you to **benchmark** [track] the energy use of any type of building.....” <https://www.energystar.gov/buildings/benchmark> PM runs in your browser.

PM is a useful planning tool for any senior living community wanting to reduce its **carbon footprint**. It can generate a number of important and useful metrics, including Greenhouse Gas Emissions (GHG) for your community’s campus or a single building. From their website: “Benchmarking turns the information on your utility bill into knowledge you can act on.”

This document is intended to be a quick start user guide. Its focus is to provide the reader with an easy way to use PM to compute the **carbon footprint** of your campus. The document uses the setup and data of a fictitious community, “USALifeCare”, entering in most cases only the required information (noted by an * in the information field). This approach allows one to become familiar with PM before expanding its use. The Figures shown are screenshots taken from the creation and use of USALifeCare.

You may choose to benchmark your **entire campus** or **individual buildings**, or both. You need to decide at the outset what approach to take. The campus approach is probably the easiest way, at least at the outset. Then, if you want, you can benchmark individual buildings as separate projects. It is recommended that you set as a benchmark a year prior to Covid, such as 2019, and then include all the energy usage data for each year from that point

- In order to benchmark your campus, you include all buildings, all uses, and all utility data in the same property file. You will need to have, or be able to aggregate, utility data for **all** your buildings.
- In order to benchmark some or all of your individual buildings you will need utility data for them individually.
- You will need to collect utility **usage** data for each type of energy used, for at least one year. We recommend you decide which year you want to benchmark against, which may require collecting and entering multiple years of usage data. Undoubtedly you will have to talk with your management and possibly your utility about how to get data. Check with your energy providers to determine if they have resources/applications to easily collect the data. Many utilities have an on-line tool that can be used to quickly access usage and billing data. They may not be willing to make the tool available to anyone except the account holder, that is management, or individual residents in the case of separate meters.

- If you are benchmarking a campus and there is **one meter**, it should be relatively easy to collect **usage** data. As a minimum you will need **usage** data on each energy source, such as electricity, natural gas, propane, or fuel oil.
- If your campus has numerous meters for any energy source you will have to find a way to aggregate the data.
- If residents are billed separately, it may be difficult to get aggregate data due to privacy concerns. Usually, the utility will be willing to release aggregate data, without customer names, to management.
- If you have utility **cost** data you may include that if you wish, but PM **does not** require costs to generate its most important metrics.

This document assumes that you, the reader, will be benchmarking your campus, at least to start.

The party who sets up the account automatically has full read/write access. Shared access to the account can be given to anyone, giving read/write access, or with read only access. However, read/write access should be quite restricted so that random changes are not made.

Within PM there are about 75 building types. We recommend using two building types when getting started: **multi-family housing and senior living community**. See the PM glossary for exact definitions.

<https://portfoliomanager.energystar.gov/pm/glossary>

- **Multifamily housing** means your apartment buildings including incidental uses such as lounges, meeting rooms, etc. If you have several apartment buildings, cottages and villas, you may enter them as one building use.
Your common facilities such as dining rooms for IL, exercise rooms, art studios, administrative offices, library, a bank, presentation rooms, conference rooms, gift shop, woodshop, etc. should be included in this category. If you have an indoor heated swimming pool you could list it separately to get a pool size, but we recommend not doing this and include its floor area to be included under multifamily.
- If you have a health facility of some kind, assisted living, memory care, or skilled nursing, it should be included as a **Senior living community**. See the PM glossary for the definition.

Do not be concerned about getting it perfect when you start out. If you want to add or delete or edit a building use you may do so at any time.

We encourage you to use this guide and do a “trial run” to become familiar with Portfolio Manager prior to attempting to create a property based on your actual senior community. Use the data provided in the **Appendix – Self Check**, and then check the results against the **Metrics Summary**, figure 39.

[Chapter 2 Creating an Account](#)

Before you begin: it will be wise to make some important initial decisions. First decide on the User Name and Password you want to access the account. And a decision needs to be made for the organization name.

- The account can be in the name of your community. This is what is generally recommended for senior living communities.
- The account could also be in the name of a residents' association, or even a committee or an individual. PM does not care what the name on the account is.

Creating the account: as a new user of Portfolio Manager (PM), the first step is to create an account. To do this click on the link below to get started, which will provide Figure 1 shown below.

www.portfoliomanager.energystar.gov/pm/login

Figure 1 Getting Started

The screenshot shows the ENERGY STAR Portfolio Manager login page. At the top left is the ENERGY STAR logo and the text 'ENERGY STAR® PortfolioManager®'. At the top right, there is a 'Help' link and language options: 'Language: English | Français | Español'. The main content area is divided into two columns. The left column is titled 'Welcome to Portfolio Manager' and contains the text 'Helping you track and improve energy efficiency across your entire portfolio of properties.' Below this is a login form with 'Username: *' and 'Password: *' labels, each followed by an input field. There are two links: 'I forgot my password.' and 'I forgot my username.' A blue 'Sign In' button is positioned to the right of these links. At the bottom of the form is a blue 'Create a New Account' button. The right column contains three links with icons: 'ENERGY STAR Buildings Homepage' (green building icon), 'Take a Training' (orange computer icon), and 'Learn More About Portfolio Manager' (blue document icon). Below these links is a note: 'These links provide more information from ENERGY STAR and are not available in French.' At the bottom of the page, there is a disclaimer: 'You are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and subject to criminal and civil penalties. Use of the system indicates consent to monitoring and recording.' Below the disclaimer are social media icons for Twitter, Facebook, YouTube, and LinkedIn, followed by links for 'Contact Us', 'Privacy Policy', 'Accessibility Statement', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

Click **Create a New Account** which will display in a window, shown in Figures 2, 3, and 4.

Figure 2 Creating a New Account

ENERGY STAR®
PortfolioManager®

Help | Login
Language: [English](#) | [Français](#) | [Español](#)

Create an Account

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

Accessing Your Account

Username: *

Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

Confirm Password: *

Selecting a Username

You cannot change your username, so choose wisely. For organizations with multiple properties, we recommend you **create a "corporate" account** which "owns" all of the properties and have an administrator share properties with employees' individual accounts as necessary.

.....

Begin by entering the **Username** and **Password**. The username can have upper and lowercase letters, numbers, dashes and underscores only. Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

The form continues; see Figure 3 on the next page.

We recommend that the person creating the login fill out both Figures 3 and 4.

Figure 3 Creating a New Account

The image shows a web form titled "About Yourself" for creating a new account. The form contains the following fields and options:

- First Name: * [Text input]
- Last Name: * [Text input]
- Job Title: * [Text input]
- Email: * [Text input]
- Confirm Email: * [Text input]
- Note: We never share your email address with third parties.
- Phone: * [Text input]
- Country: * [Dropdown menu: Select Country]
- Language: [Dropdown menu: English]
- Reporting Units:
 - Conventional EPA Units (e.g., kBtu/ft²)
 - Metric Units (e.g., GJ/m²)
- Street Address: * [Text input]
- [Text input]
- City/Municipality: * [Text input]
- State/Province: * [Dropdown menu: --- Select ---]
- Postal Code: * [Text input]

On the right side, there is a sidebar note with a yellow icon containing the number 7:

7 First & Last Name for Organizations

If you are creating a corporate account, you can enter your organization's name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

Below the note is a horizontal row of 15 small grey circles, with the first one being slightly larger and darker, indicating the current step in a sequence.

In Figure 3 enter the requested information about yourself.

The form continues; see Figure 4 on the next page.

Figure 4 Creating a New Account

About Your Organization

Organization Name: *

Primary Business or Service of Your Organization: * Select Primary Business or Service

Is your organization an ENERGY STAR Partner? Yes No

Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?

Do you want your username to be searchable by other Portfolio Manager users? You must select "Yes" if you want to connect with other users to allow automatic upload of utility data or to share properties.

Yes No

Confirm Your Identity

Please confirm that you are a human

I'm not a robot

reCAPTCHA Privacy - Terms

Create My Account [Cancel](#)

Primary Business or Service

If you have more than one "primary business," just pick the best option. Portfolio Manager will determine your category for a score based on the information, like square footage, that you enter for each of your property uses.

Connecting with Others in Portfolio Manager

You can connect with other people in Portfolio Manager to easily share information. Your account must be searchable in order for others to send you a connection request.

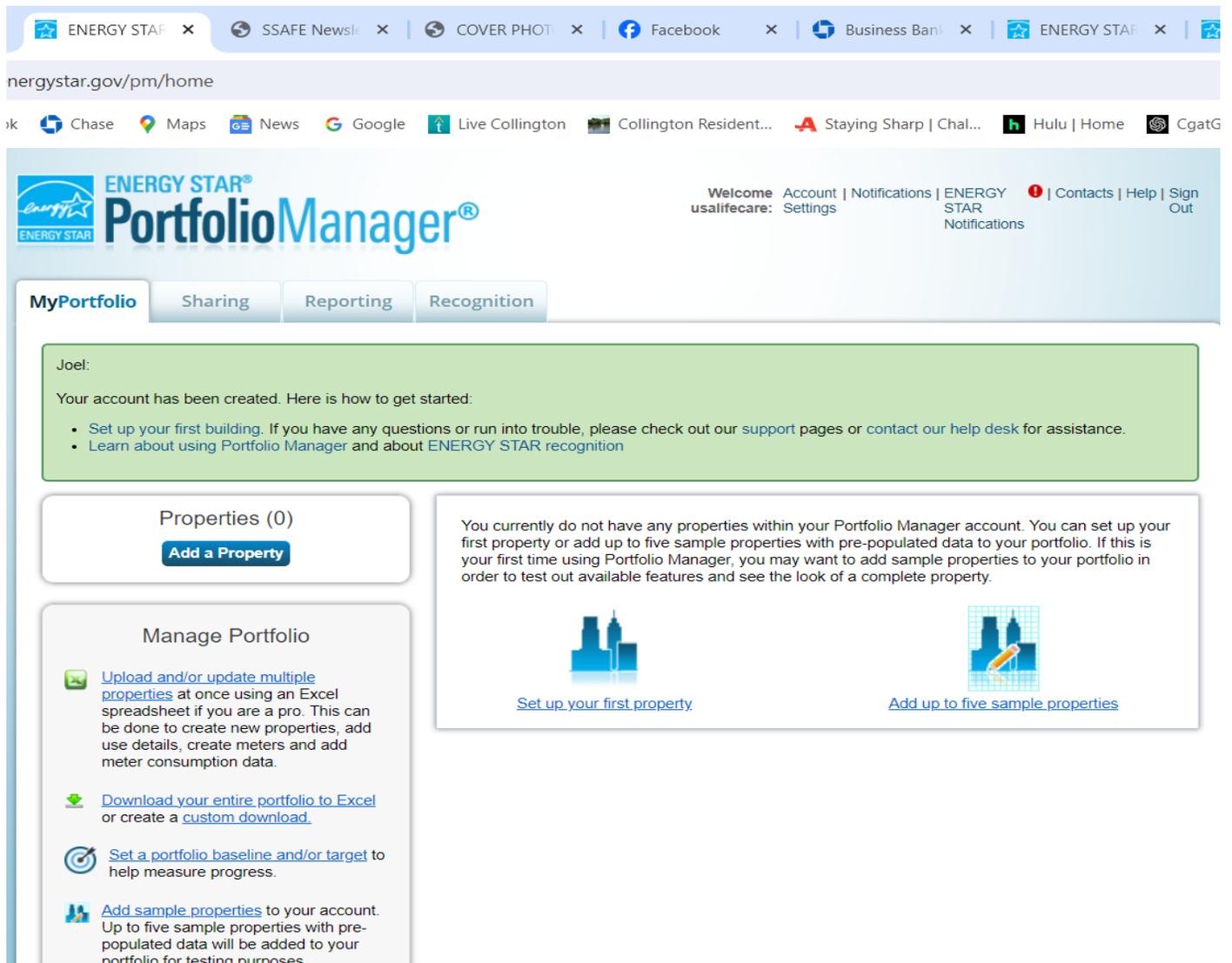
Figure 4 shows where to enter the **Organization Name**. Figure 4 also indicates the recommended selections for the other boxes

When the information has been entered click on **Create My Account**. A link will be sent to the email address provided; the message includes the following:

"You're almost there. The final step in creating your Portfolio Manager account is to click on [this link](#) to verify your email address, then log into Portfolio Manager. **This link will be available for 24 hours.** If you don't click on this link within 24 hours, you'll need to repeat the process of creating a new account."

When you click on the link, PM will take you to the login screen, and after you login, Figure 5, shown on the next page will be displayed indicating that your account has been created.

Figure 5 Your Account Has Been Created



Congratulations! You are now ready to proceed to Chapter 3, Setting Up a Property.

Click on **Setup your first property**. Figure 6, next page will be displayed.

Chapter 3 Setting up a Property

In this chapter we define the characteristics of the property. We start with entering the main use of the property, which for a senior community will normally be Multifamily Housing. Even though your campus may have more than one building, the example shown in this document has one, and construction status as Existing. Then click **Get Started**.

Figure 6 Set up a Property: Let's Get Started!

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!



Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

[Learn more about Property Types.](#)



Your Property's Buildings

How many physical buildings do you consider part of your property?

None: My property is part of a building (e.g., a Tenant Space)

One: My property is a single building

More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?



Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.

Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.

Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

Get Started! [Cancel](#)

Fill in the information as above and then click **Get Started**. A window with Figures 7 and 8, next pages, will be displayed.

In Figure 7 one adds very specific information about the property. Each property that is entered will have a unique name and information. For this document we are setting up one property, USA Life Care Campus. The street address must be an actual address! Since we are first focusing on calculating greenhouse gas emissions, having an exact value for **Gross Floor Area** and **Occupancy** is not that important. (If you want Portfolio Manager to calculate an Energy Star Score you need to enter areas accurately.)

Figure 7 Set up a Property: Let's Get Started!

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name: *

Country: *

Street Address: *

City/Municipality: *

County:

State/Province: *

Postal Code: *

Year Built: *

Gross Floor Area: * Temporary Value
Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. [Details on what to include.](#)

Irrigated Area: Default Value

Occupancy: * %

Property Photo (optional): No file chosen

Tip

The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

Tip

The property photo that you upload here can be used on the [Registry of ENERGY STAR Qualified Buildings](#) if you submit the photo with your application for ENERGY STAR certification. Once a

Fill in the information for your property as shown. Note that the street address must be real address.

The form continues as Figure 8 on the next page.

In Figure 8 it is recommended only adding the **Percentage of units that offer nursing/assisted care**. When completed click **Continue**. However, if you are interested in an accurate Energy Star score, then the applicable boxes should be checked.

Figure 8 Set up a Property: Let's Get Started!

Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

Standard ID - City/Town: ID:

Standard ID - County/District: ID:

Standard ID - State/Province: ID:

Standard ID - Other: ID:

[+ Add Another](#)

Do any of these apply?

- My property's energy consumption includes [parking](#) areas
- My property has a [heated swimming pool](#)
- My property has one or more retail stores ([that are eligible for a Retail score](#))
- My property has one or more restaurants/cafeterias
- My property has nursing/assisted care units

Percentage of units that offer nursing/assisted care
* % (1-100)

[Back](#) [Continue](#) [Cancel](#)

Tip
Answering these simple questions will help us guide you in entering your property correctly.

Usually, it will not be necessary to fill out the ID sections of this form. If you only enter the building area, Portfolio Manager will accurately calculate your carbon footprint. It will use default values for other data and therefore not accurately calculate your energy star score.

Click **Continue**. A window with Figures 9, 10 and 11 is displayed.

Figure 9 allows you to edit basic information about the property if you need to.

Figure 9 Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

[Basic Information](#)

Name:	USA Life Care Campus	Country:	US
Property Type:	Multifamily Housing	Address:	10450 Lottsford Road Mitchellville, MD 20721 Map It
Year Built:	2008		
Property consists of:	1 building with parking		

[Edit](#)

[Add](#)

[Multifamily Housing Use](#) [Edit Name](#) [Delete](#)

Multifamily Housing refers to residential properties that contain two or more residential living units. These properties may include low-rise buildings (1-4 stories), mid-rise buildings (5-9 stories), or high-rise buildings (10+ stories). Multifamily housing may consist of a single building or multiple co-located buildings that act as a single property or [campus](#) (such as a garden apartment community). Occupants of these buildings may include tenants, cooperators, and/or individual owners.

Gross Floor Area should include all space within the building(s), including but not limited to living units (occupied and unoccupied units), interior common areas (e.g. lobbies, offices, community rooms, restrooms, common kitchens, fitness rooms, indoor pools), hallways, stairwells, elevator shafts, connecting corridors between buildings, storage areas, and mechanical space such as a boiler room. GFA should include all buildings that are part of the multifamily property, including any separate management offices or other buildings that may not contain living units. Open air stairwells, breezeways, and other similar areas that are not fully-enclosed should not be included in the GFA.

To be eligible for an ENERGY STAR score and certification in the US:

- 2 units or more per building
- 20 units or more per property/campus
- At least 80% occupancy
- Communities of single-family homes are not eligible. If your property is a mix of multifamily and single-family homes, the property would still be eligible as long as the single-family homes are less than 25% of the total GFA. Combine the single-family home GFA with the Multifamily property use.

This form continues; see Figure 10, next page.

Figure 10 describes the Multifamily Housing Unit portion of the property, and Figure 11 the Senior Living portion. The **only information** required for both is their **Gross Floor Area**. Besides the area, Portfolio Manager asks for additional information on this screen. We recommend that you add it only if you want an accurate Energy Star score. Without it, Portfolio Manager will calculate an Energy Star score using default values, which will not reflect your actual situation, and your score will not be accurate. (However, other metrics, such as GHG emissions **will** be accurate without this additional data.) **Since this document is focused on GHG emissions, we have not added this information.**

Figure 10 Set up a Property: How is it used?

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 500,000 <input type="text"/> Sq. Ft. <input type="text"/>	1/1/2008 <input type="text"/>	<input type="checkbox"/>
★ Total Number of Residential Living Units	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="text"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Low-rise Building (1-4 stories)	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="text"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Mid-rise Building (5-9 stories)	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="text"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a High-rise Building (10 or more stories)	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="text"/>	<input type="checkbox"/>
★ Number of Bedrooms	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="text"/>	<input type="checkbox"/>
Common Entrance	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="text"/>	<input type="checkbox"/>
Resident Population Type	<input type="text"/>	1/1/2008 <input type="text"/>	<input type="checkbox"/>
Government Subsidized Housing	<input type="text"/>	1/1/2008 <input type="text"/>	<input type="checkbox"/>
Number of Laundry Hookups in All Units	<input type="text"/>	1/1/2008 <input type="text"/>	<input type="checkbox"/>
Number of Laundry Hookups in Common Area(s)	<input type="text"/>	1/1/2008 <input type="text"/>	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="text"/>	<input type="checkbox"/>
Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2008 <input type="text"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score and Water Score.

▼ **Senior Living Community Use** [Edit Name](#) Delete

Senior Living Community refers to buildings that house and provide care and assistance for elderly residents, specifically homes (skilled nursing facilities) and

Note that the area on the screen should be for the Multifamily portion of your property. The form continues on Figure 11 on the next page.

Figure 11 Set up a Property: How is it used?

units (e.g. game rooms or restaurants) should be benchmarked with the Multifamily property use.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	<input type="text" value="165,000"/> Sq. Ft. ▾	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Maximum Resident Capacity	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Average Number of Residents	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Total Number of Residential Living Units	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Number of Residential Washing Machines	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Number of Commercial Washing Machines	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Number of Residential Electronic Lift Systems	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Number of Commercial Refrigeration/Freezer Units	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>
Licensed Bed Capacity	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2008"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

[Back](#)

[Add Property](#) [Cancel](#)

When completed click **Add Property**. You may get a screen that says that the areas of different uses do not add up to the property total. If so, go back and edit until the areas are correct. You may have an error for the property total or for one or more of the uses. When correct, Figure 12, next page, will be displayed.

Congratulations! Your property is now set up. You are now ready to proceed to Chapter 4 where you provide energy usage data.

Chapter 4 Entering Energy Use Information

Click on the name of the property, in this example **US Life Care Campus**, to start entering energy usage information.

Figure 12 My Portfolio

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top, the logo and navigation links are visible. The main content area is divided into several sections:

- MyPortfolio** (selected), **Sharing**, **Reporting**, and **Recognition** tabs.
- Properties (1)** section with an **Add a Property** button.
- Refresh to see Source EUI Trend** section with a **Change Metric** link and a line chart showing data from 2013 to 2023.
- Manage Portfolio** section with links for **Transfer ownership** and **Upload and/or update multiple properties**.
- Dashboard** section with a search bar, a **Refresh Metrics** button, and a table of properties.

The table in the Dashboard section contains the following data:

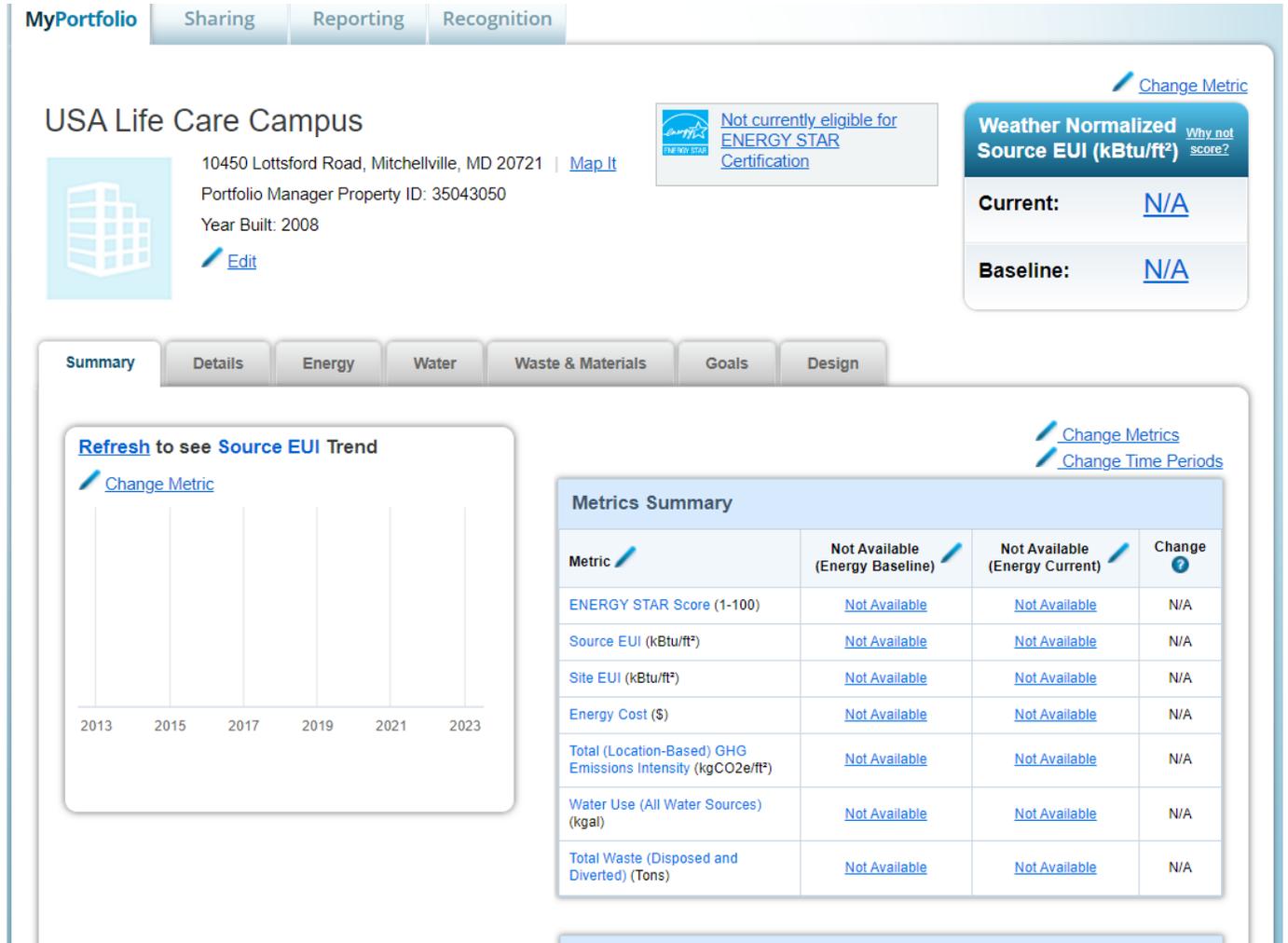
Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft ²)	Source EUI (kBtu/ft ²)
USA Life Care Campus 35043050				

Navigation controls at the bottom of the table include **First**, **Previous**, **Page 1 of 1**, **Next**, **Last**, a page size dropdown set to **100**, and **View 1 - 1 of 1**.

When you click on a property. Figure 13, next page, will be displayed.

Figure 13 is the “Dashboard” for your property. Each property in your portfolio will have its own dashboard. Most senior communities will have only one property, but some might have multiple campuses. You will return to the dashboard from time to time to enable various features within Portfolio Manager.

Figure 13 My Portfolio Summary



Click the **Energy** tab to begin entering energy usage data. A window with Figures 14 and 15 is displayed.

Figure 14 My Portfolio Energy



Welcome **usalifecare** | Account | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out

MyPortfolio | Sharing | Reporting | Recognition

USA Life Care Campus

10450 Lottsford Road, Mitchellville, MD 20721 | [Map It](#)
Portfolio Manager Property ID: 35043050
Year Built: 2008
[Edit](#)

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?
Current: [N/A](#)
Baseline: [N/A](#)

Summary | Details | **Energy** | Water | Waste & Materials | Goals | Design

Meter Summary

0 Energy Meters Total
In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.
[Add A Meter](#)

Current Energy Date
Not Available
[Enter Your Bills](#)

Meters - Used to Compute Metrics (0)

[View as a Diagram](#) [Add A Meter](#)

! There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. [Enter information about your energy meters](#) to begin tracking energy usage. After entering the meter, you will need to [choose to include it in your metrics](#).

For a step-by-step guide to entering meter data, see [How to get Utility Data into Portfolio Manager](#).

Your utility, Pepco, may be able to send energy data directly to this building record, using Portfolio Manager web services. [Click here](#) for additional information and to see if this option is right for you. If this is what you would like to do, you can [connect](#) with Pepco to get the process started.

Five Ways to Enter Bill Data

1. Manual (Instructions here)

Figure 15 My Portfolio Energy

3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)

4. [Hire an organization](#) to electronically enter your data

5. See if your [utility offers this service](#)

Your Property is: [Edit](#)

A Single Building

Part of a Building

A Campus of Multiple Buildings

You Are Tracking: [Edit](#)

Before you can tell us what you are tracking, you must [provide meters](#). You have not entered any meters yet for this property.

Utility & Weather

Electric Distribution Utility (EDU):
Potomac Electric Power Co

Regional Power Grid:
RFCE (Mid Atlantic)

Weather Station:
ANDREWS AFB/CAMP SP (745940)

 Your [electric distribution utility \(EDU\)](#) and [weather station](#) selections affect the calculation of your energy metrics.

[Edit](#)

Confirm that the information in the box at the bottom of Figure 15 is correct, and if not, click **Edit** and update.

You are now ready to add meters. Click **Add A Meter** in Figure 14. Figure 16, next page, will be displayed.

For each energy source your campus uses, you will add a meter and select its energy source. For USA Life Care Campus, we selected two sources: Electric and Natural Gas.

Figure 16 Source of the Property's Energy



Sources of Your Property's Energy

What kind of **energy** do you want to track? Please select all that apply.

- Electric
 - purchased from the grid
How Many Meters?
 - generated from onsite solar panels
 - generated from onsite wind turbines
- Natural Gas
How Many Meters?
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Coal (anthracite)
- Coal (bituminous)
- Coke
- Wood
- Kerosene
- Fuel Oil (No. 1)
- Other:



Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

.....



Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More.](#)

.....



Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. [Learn more.](#)

.....

Get Started! [Cancel](#)

When you have selected your meters, click **Get Started**. Figure 17, next page, will be displayed.

Figure 17 About Your Meters for USA Life Care Campus

ENERGY STAR®
PortfolioManager®

Welcome usalifecare: Account | Notifications | Settings | ENERGY STAR Notifications | Contacts | Help | Sign Out

About Your Meters for USA Life Care Campus

Enter the information below about your new meters. The meter's **Units** and **Date Meter became Active** are required. You can also change the meter's name.

2 Energy Meters for USA Life Care Campus (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Meter ID 1 Name
<input type="checkbox"/>	Natural Gas	Natural Gas				<input checked="" type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		<input type="checkbox"/>	

[Delete Selected Entries](#)
[Add Another Entry](#)

[Cancel](#)

Follow Us
[Contact Us](#) | [Privacy Policy](#) | [Accessibility Statement](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

In the above screen check the two **Meter Names**, and then add the **Units** and **Dates Meter Became Active**, check the **In Use?** box for each meter.

When completed, click **Create Meters**. Figure 18, next page, will be displayed showing one of your meters.

Your meters have been created!

Figure 18 Your Meter Entries for USA Life Care Campus

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later.

Your Meter Entries for USA Life Care Campus

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

2 Energy Meter(s) for USA Life Care Campus

▼ **Natural Gas**

	Start Date	End Date	Usage therms	Total Cost (\$)	Estimation
Click to add an entry					

✖ [Delete Selected Entries](#)
+ [Add Another Entry](#)
📄 [Learn how to copy/paste](#)

Upload data in bulk for this meter:

📌 Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- [Copy and Paste the data into the table above](#)

Choose File No file chosen Upload

▶ **Electric Grid Meter**

Continue [Cancel](#)

Click **Continue**. Figure 19, next page, will be displayed.

Figure 19 Select Meters to Include in Metrics

MyPortfolio | Sharing | Reporting | Recognition

Select Meters to Include in Metrics

Tell us which meters to include when calculating the metrics for [USA Life Care Campus](#) so that we can provide you with the most accurate metrics possible.

Summary

2

Meters representing the **total** energy consumption for [USA Life Care Campus](#) (a single building).

Energy Meters

Select all meters to be included in your metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

<input checked="" type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	Natural Gas 190580391	Natural Gas
<input checked="" type="checkbox"/>	Electric Grid Meter 190580392	Electric - Grid

Total of 2 meter(s). Tell us what this represents:

- These meter(s) account for the total energy consumption for [USA Life Care Campus](#) (a single building).
- These meter(s) do not account for the total energy consumption for [USA Life Care Campus](#) (a single building).

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

.....

Apply Selections [Cancel](#)

Figure 19 asks you to select the meters to include in the energy metrics.

Select each box in the table and what this represents. When done, click **Apply Selections**. Figure 20, next page, will be displayed.

Figure 20, the main Dashboard for your property, is displayed with the **Energy** tab highlighted.

Figure 20 Dashboard

MyPortfolio | Sharing | Reporting | Recognition

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

USA Life Care Campus

10450 Lottsford Road Apt 2204, Mitchellville, MD 20721
[Map It](#)
Portfolio Manager Property ID: 35178187
Year Built: 2008
[Edit](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?
Current: [N/A](#)
Baseline: [N/A](#)

[Change Metric](#)

Not currently eligible for **ENERGY STAR** Certification

Summary | Details | **Energy** | Water | Waste & Materials | Goals | Design

Meter Summary

2 Energy Meters Total
2 - Used to Compute Metrics

[Add A Meter](#)

Current Energy Date
Not Available

[Enter Your Bills](#)

Meters - Used to Compute Metrics (2)

[Change Meter Selections](#)
[View as a Diagram](#)

Meter Name Portfolio Manager Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Natural Gas 191225255	Natural Gas		Yes
Electric Grid Meter 191225256	Electric - Grid		Yes

[Download Annual Totals by Meter](#)

Five Ways to Enter Bill Data

1. Manual ([Instructions here](#))
2. Use our simple spreadsheet (on

Your meters have been created and you can now enter energy meter data. To proceed click **Enter Your Bills**. Figure 21, next page, will be displayed.

Figure 21 Manage Bills (Meter Entries) for USA Life Care campus

ENERGY STAR®
PortfolioManager®

Welcome usalifecare: Account Settings | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out

Manage Bills (Meter Entries) for [USA Life Care Campus](#)

Meter Selection: Natural Gas - 190580391

▶ Basic Meter Information (**click on the arrow to the left to expand this section)

▼ Monthly Entries

Display Year(s): 2019 x

Start Date	End Date	Usage therms	Total Cost (\$)	Estimation	Last Updated
Click to add an entry					

[X Delete Selected Entries](#)
[+ Add Another Entry](#)
[📄 Learn how to copy/paste](#)
[X Delete ****ALL**** Meter data for this meter](#)

Upload data in bulk for this meter:

[📄](#) Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

Choose File No file chosen Upload

In this window one begins to enter the monthly data. The gas meter shows in the Meter Selection Box and you will add data for it.

Click on **Click to Add An Entry**. Figure 22, next page, will be displayed.

In this example for Natural Gas, we are only entering in the first line the **Start Date**, **End Date** and **Usage Therms** from the utility bill(s). The remaining information is optional.

Figure 22 Monthly Entries Natural Gas

Basic Meter Information (**click on the arrow to the left to expand this section)

Monthly Entries

Display Year(s): 2019 x

	Start Date	End Date	Usage therms	Total Cost (\$)	Estimation	Last Updated
<input type="checkbox"/>	1/1/2019	2/1/2019	19,879		<input type="checkbox"/>	

[Delete Selected Entries](#)
[Add Another Entry](#)
[Learn how to copy/paste](#)
[Delete ****ALL**** Meter data for this meter](#)

Upload data in bulk for this meter:

i Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

Choose File No file chosen Upload

Save Bills Cancel

Fill in the necessary fields. When done, click **Add Another Entry** to enter the next month's usage in therms. (For some properties gas usage will be available in CCF.) Figure 23, next page, will be displayed.

Note that **Start Date** and **End Date** will be prefilled (but if necessary can be edited if the billing period varies). Fill in the information for the second line, then click **Add Another Entry** again.

Repeat for each billing period for which you have data; you will need to have at least 12 months of data to enable Portfolio to generate useful information.

When you are done entering data for the meter, or want to save the data already entered, click **Enter** on your keyboard, and click **Save Bills**. Figure 24, next page, will be displayed.

Figure 23 Monthly Entries Natural Gas

Monthly Entries

Display Year(s): 2019 x

	Start Date	End Date	Usage therms	Total Cost (\$)	Estimation	Last Updated
<input type="checkbox"/>	1/1/2019	2/1/2019	19,879		<input type="checkbox"/>	
<input type="checkbox"/>	<input type="text" value="02/01/2019"/>	<input type="text" value="03/01/2019"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	

[X Delete Selected Entries](#)
[+ Add Another Entry](#)
[📄 Learn how to copy/paste](#)
[X Delete ****ALL**** Meter data for this meter](#)

Upload data in bulk for this meter:

i Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

No file chosen

[Cancel](#)

You can click **Save Bills** at any time. It is wise to save frequently and certainly when you have finished adding data for a meter.

You have successfully updated your bills (i.e. consumption information for Natural Gas). Note the **Display Year(s)** box. You can select one or all the years for which you have entered data to display the information.

Figure 24 Successfully Updated Your Bills

Congratulations! You have successfully updated your bills (i.e., consumption information) to Natural Gas.

Meter Selection:

▶ **Basic Meter Information** (**click on the arrow to the left to expand this section)

▼ **Monthly Entries**

Display Year(s):

	Start Date	End Date	Usage therms	Total Cost (\$)	Estimation	Last Updated
<input type="checkbox"/>	12/1/2023	1/1/2024	19,000.7		<input type="checkbox"/>	7/8/2024 usalifecare

[X Delete Selected Entries](#) [+ Add Another Entry](#) [Download to Excel](#)
[📄 Learn how to copy/paste](#)
[X Delete ****ALL**** Meter data for this meter](#)

Upload data in bulk for this meter:

Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

No file chosen

[Cancel](#)

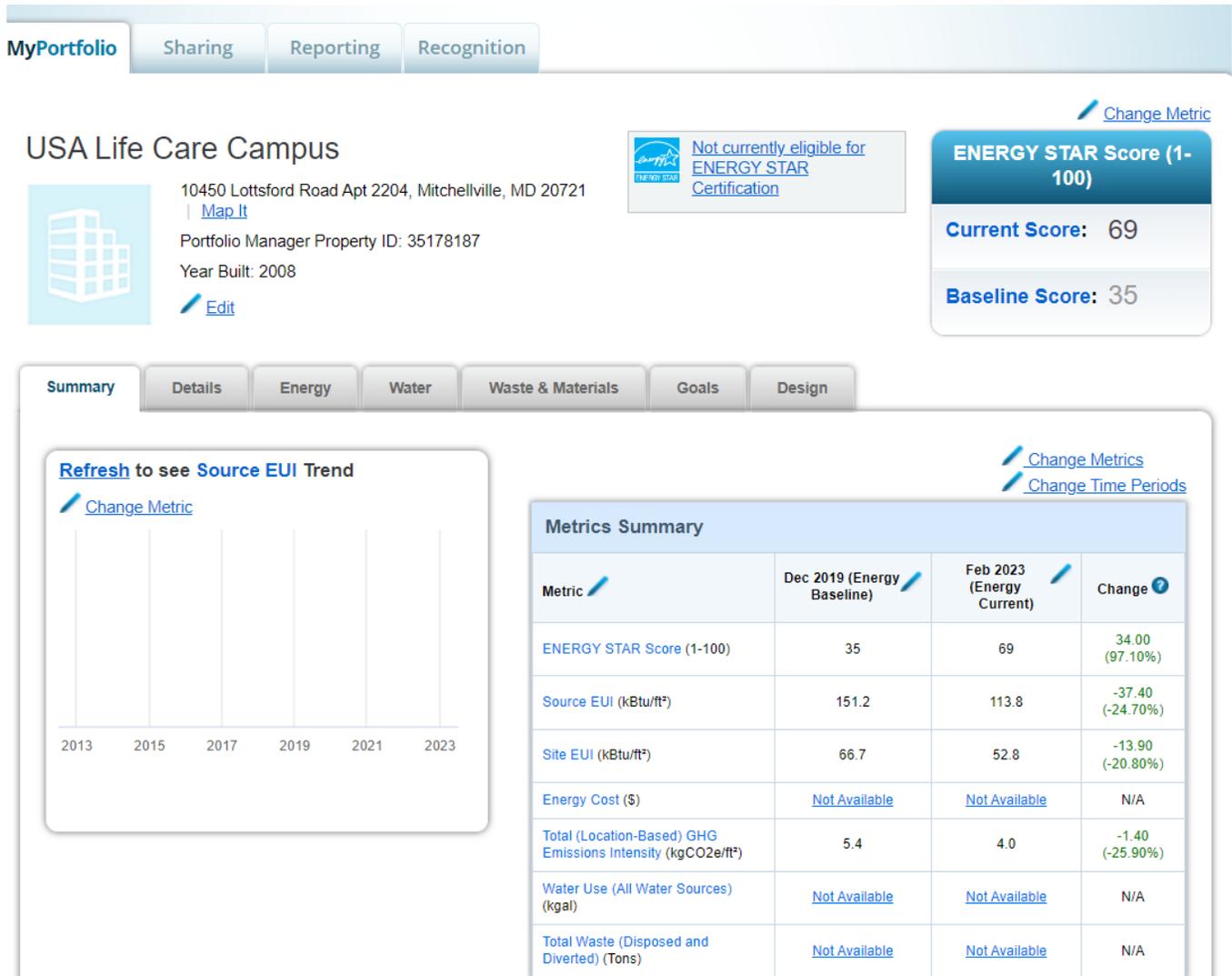
The same steps for entering the Natural Gas information are used for each meter on your property by selecting the meter in the **Meter Selection** box. You would normally have information for electricity, and may have usage data for propane, fuel oil, or other energy sources.

When you have finished entering all available data click **Save Bills**.

Then use the arrows in your browser to return to the dashboard for your property.

The **Summary** tab on dashboard for your property will show basic property information. It will also show the seven metrics that are calculated by default by Portfolio Manager if you have entered building areas and at least a year's worth of energy usage data.

Figure 25 The Dashboard for Your Property



Numerous other metrics are available within Portfolio Manager. If you want to change one or more, click on the **Change Metric** button. A maximum of seven metrics can be displayed at one time. You may also create custom reports showing your choice of metrics, as described in Chapter 5.

We changed the metrics displayed on the dashboard to show the Greenhouse Gas Emissions.

Figure 26 Dashboard Changed Metrics

MyPortfolio
Sharing
Reporting
Recognition

USA Life Care Campus

10450 Lottsford Road Apt 2204, Mitchellville, MD 20721
[Map It](#)

Portfolio Manager Property ID: 35178187

Year Built: 2008

[Edit](#)

Not currently eligible for ENERGY STAR Certification

[Change Metric](#)

ENERGY STAR Score (1-100)

Current Score: 69

Baseline Score: 35

Summary

Details

Energy

Water

Waste & Materials

Goals

Design

Refresh to see Source EUI Trend

[Change Metric](#)

[Change Metrics](#)
[Change Time Periods](#)

Metrics Summary			
Metric Change Metric	Dec 2019 (Energy Baseline)	Feb 2023 (Energy Current)	Change Change
ENERGY STAR Score (1-100)	35	69	34.00 (97.10%)
Total (Location-Based) GHG Emissions (Metric Tons CO2e)	3,580.6	2,680.1	-900.50 (-25.10%)
Direct GHG Emissions (Metric Tons CO2e)	718.1	685.5	-32.60 (-4.50%)
Indirect (Location-Based) GHG Emissions (Metric Tons CO2e)	2,862.6	1,994.5	-868.10 (-30.30%)

Custom Intensity Metrics ([Learn more about this feature](#)) [Change Metric](#)

Create up to three custom intensity metrics to view in reporting for this property.

If you click on the **Details** tab a window will appear showing detailed information on your property. You can make corrections if necessary.

Figure 27 Dashboard Details

USA Life Care Campus



10450 Lottsford Road Apt 2204, Mitchellville, MD 20721
[Map It](#)

Portfolio Manager Property ID: 35178187

Year Built: 2008

[Edit](#)

Not currently eligible for ENERGY STAR Certification

ENERGY STAR Score (1-100)

Current Score: 69

Baseline Score: 35

- Summary
- Details
- Energy
- Water
- Waste & Materials
- Goals
- Design

Basic Information

Construction Status:
Existing property that is one single building

Property GFA - Self-Reported:
665,000 Sq. Ft.

Occupancy:
95%

[Edit](#)

Unique Identifiers (IDs)

Portfolio Manager ID:
35178187

Standard IDs:
None

Custom IDs:
None

You can select from Portfolio Manager's **Standard IDs** to provide information to others in data requests. Or you can create up to three **Custom IDs** so that you can

Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
Multifamily Housing Use	Multifamily Housing	500,000 ft ²	I want to... <input type="text"/>
Senior Living Community Use	Senior Living Community	165,000 ft ²	I want to... <input type="text"/>
Custom Use Details (Learn More)			I want to... <input type="text"/>
Property GFA (Buildings):		665,000 (used to calculate EUI)	
Property GFA (Parking):		0	

To edit multiple uses for this property (or multiple properties), you can use the [Update Use Details spreadsheet template](#).



Property Type

Property Type - Self-Selected:
Multifamily Housing [Edit](#)

Chapter 5 Reports

Once you have completed entering the energy usage information, you can begin creating and generating custom reports.

While one can utilize a standard report, this chapter focuses on creating a custom report to display the greenhouse gas emissions for your property. Greenhouse Gas (GHG) Emissions are the carbon dioxide (CO₂), methane (CH₄), and nitrous oxide (N₂O) gases released into the atmosphere as a result of energy consumption at the property. In order to help you assess the emissions footprint associated with your energy consumption, Portfolio Manager incorporates a number of metrics to quantify these emissions.

- **Total Emissions.** Total Emissions is the primary metric, quantifying the majority of GHGs associated with a property. It can be broken down into component metrics, also available in Portfolio Manager:
- **Direct Emissions.** Emissions from fuel that is directly burned at property, for example natural gas and electricity. Emissions are calculated by multiplying the site energy for each fuel by the emissions factor for that specific fuel type. These factors incorporate the emissions of carbon dioxide, methane, and nitrous oxide, to provide a single carbon dioxide equivalent (CO₂e) number.
- **Indirect Emissions.** Emissions associated with energy purchased from a utility, for example emissions associated with the generation of natural gas and electricity

Figure 28 The Dashboard for Your Property

MyPortfolio
Sharing
Reporting
Recognition

USA Life Care Campus

10450 Lottsford Road Apt 2204, Mitchellville, MD 20721
[Map It](#)

Portfolio Manager Property ID: 35178187

Year Built: 2008
[Edit](#)

[Not currently eligible for ENERGY STAR Certification](#)

[Change Metric](#)

ENERGY STAR Score (1-100)

Current Score: 69

Baseline Score: 35

Summary
Details
Energy
Water
Waste & Materials
Goals
Design

[Refresh](#) to see **Source EUI Trend**

[Change Metric](#)

[Change Metrics](#)
[Change Time Periods](#)

Metrics Summary			
Metric	Dec 2019 (Energy Baseline)	Feb 2023 (Energy Current)	Change
ENERGY STAR Score (1-100)	35	69	34.00 (97.10%)
Total (Location-Based) GHG Emissions (Metric Tons CO2e)	3,580.6	2,680.1	-900.50 (-25.10%)
Direct GHG Emissions (Metric Tons CO2e)	718.1	685.5	-32.60 (-4.50%)
Indirect (Location-Based) GHG Emissions (Metric Tons CO2e)	2,862.6	1,994.5	-868.10 (-30.30%)

Custom Intensity Metrics ([Learn more about this feature](#))

Create up to three custom intensity metrics to view in reporting for this property.

Click the tab at the top of your dashboard, **Reporting**. Figure 29, next page, will be displayed.

As yet the window shows that no custom reports have actually been generated.

Figure 29 Charts & Graphs

ENERGY STAR®
PortfolioManager®

Welcome usalifecare: Account Settings | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out

MyPortfolio | Sharing | **Reporting** | Recognition

Charts & Graphs

Total (Location-Based) GHG Emissions Intensity
What is the carbon footprint resulting from my properties' energy use?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SED\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Scorecard](#)
- [Water Scorecard](#)

Data Requests from Others | **My Reports and Templates** | ENERGY STAR Reports | [Create a New Template](#)

Name	Status	Action
No Custom Reports Available		

Need help with your state/local ordinance report? See our 5-page guide: [How to respond to data requests in Portfolio Manager](#) and our [FAQ](#) with a link to each city program.
Generated reports will only be available for 90 days. After that time you just need to "generate" a new report to populate your template with data.

Click on **Create a New Template**. Figure 30, next page, will be displayed.

Figure 30 Create a Report Template

MyPortfolio | Sharing | Reporting | Recognition

Create a Report Template

Report templates provide you with an easy way to regularly access information and metrics. You can regularly prepare reports or graphs using Excel. You can also use your custom report template to collect data from other Portfolio Manager users. You can even share templates that you create with other people who may have similar needs with their properties.

- 1 Name Your Template**
Name: *
Please provide a unique name for this template
- 2 Select Timeframe**
Timeframe: * for:
 Each property must have 12 full months of data for metrics to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report. Pick the **last day** of the 12 month period that you want.
- 3 Select Properties**
Properties: Selected Items: [0](#)
- 4 Select Information & Metrics**
Information & Metrics: * Selected Items: [4](#)

[Cancel](#)

Tip
As you create and save your templates, they will appear in the Templates & Reports section of the Reporting tab. Keeping the names unique will make it easier for you to find and use your templates.

Tip
If you are planning to use your report template to request information from other people, you only need to select the timeframe and information/metrics. When the people respond to your request, they will select the properties to include.

Enter a **Name** for the report template, select the **Timeframe** for the report, and click **Select Properties**.

Figure 31, next page, will be displayed.

Figure 31 Select Properties

Select Properties ✕

Search: Selected Properties: 1 ([View Selection](#))

<input type="checkbox"/>	Name ▲	Property Type ◆	State/Province ⇅
<input checked="" type="checkbox"/>	USA Life Care Campus	Multifamily Housing	MD

Filter Properties (1)

Filter by Property Type

Multifamily Housing (1)

Filter by Construction Status

Existing (1)

Filter by State/Province

Maryland (1)

Filter by Shared from

None - My Properties (PDA) (1)

First Previous Page 1 of 1 Next Last 100 ▼

Selected Properties: 1 ([View Selection](#))

[Apply Selection](#) [Cancel](#)

Click the box next to the property you want the report for, and then click **Apply Selection**. This takes one back to Figure 30.

In Figure 30 click on **Select Information and Metrics**. Figure 32, next page, will be displayed.

Figure 32 Select Information & Metrics

Portfolio | Sharing | Reporting | Recognition

Select Information & Metrics Selected items: 4 of 50 maximum ([View Selection and Order](#))

Category	Item	Selected
Property Information	Property Name	<input checked="" type="checkbox"/>
	Parent Property Name	<input checked="" type="checkbox"/>
Property ID Numbers	Address 1	<input type="checkbox"/>
	Address 2	<input type="checkbox"/>
Property Use Details	City	<input type="checkbox"/>
	County	<input type="checkbox"/>
Meter Information	State/Province	<input type="checkbox"/>
	Postal Code	<input type="checkbox"/>
Energy Use by Fuel Source	Country	<input type="checkbox"/>
	Property GFA - Self-Reported (ft ²)	<input type="checkbox"/>
Data Accuracy	Property GFA - Calculated (Buildings and Parking) (ft ²)	<input type="checkbox"/>
	Property GFA - Calculated (Buildings) (ft ²)	<input type="checkbox"/>
Energy Performance Metrics	Property GFA - Calculated (Parking) (ft ²)	<input type="checkbox"/>
	Primary Property Type - Self Selected	<input type="checkbox"/>
Water Performance Metrics	Primary Property Type - Portfolio Manager-Calculated	<input type="checkbox"/>
	National Median Reference Property Type	<input type="checkbox"/>
Waste Performance Metrics	List of All Property Use Types (GFA) (ft ²)	<input type="checkbox"/>
	Largest Property Use Type	<input type="checkbox"/>
Cost Performance Metrics	Largest Property Use Type - Gross Floor Area (ft ²)	<input type="checkbox"/>
	2nd Largest Property Use Type	<input type="checkbox"/>
Greenhouse Gas Emissions	2nd Largest Property Use Type - Gross Floor Area (ft ²)	<input type="checkbox"/>
	3rd Largest Property Use Type	<input type="checkbox"/>

[Download Full List of Information & Metrics](#) Selected items: 4 of 50 maximum ([View Selection and Order](#)) **Apply Selection** Cancel

Click **Greenhouse Gas Emissions**. Figure 33, next page, will be displayed.

Figure 33 Select Information & Metrics

Select Information & Metrics Selected items: 7 of 50 maximum ([View Selection and Order](#))

Property Information	<input checked="" type="checkbox"/> Total (Location-Based) GHG Emissions (Metric Tons CO2e)
Property ID Numbers	<input type="checkbox"/> Total (Location-Based) GHG Emissions Intensity (kgCO2e/ft²)
Property Use Details	<input checked="" type="checkbox"/> Direct GHG Emissions (Metric Tons CO2e)
Meter Information	<input type="checkbox"/> Direct GHG Emissions Intensity (kgCO2e/ft²)
Energy Use by Fuel Source	<input checked="" type="checkbox"/> Indirect (Location-Based) GHG Emissions (Metric Tons CO2e)
Data Accuracy	<input type="checkbox"/> Indirect (Location-Based) GHG Emissions Intensity (kgCO2e/ft²)
Energy Performance Metrics	<input type="checkbox"/> Biomass GHG Emissions (Metric Tons CO2e)
Water Performance Metrics	<input type="checkbox"/> Biomass GHG Emissions Intensity (kgCO2e/ft²)
Waste Performance Metrics	<input type="checkbox"/> National Median Total (Location-Based) GHG Emissions (Metric Tons CO2e)
Cost Performance Metrics	<input type="checkbox"/> Canadian Regional Median Total (Location-Based) GHG Emissions (Metric Tons CO2e)
Greenhouse Gas Emissions	<input type="checkbox"/> Canadian Regional Median Total (Location-Based) GHG Emissions Intensity (kgCO2e/ft²)
Renewable Energy & Green Power	<input type="checkbox"/> Emissions Factor (Location-Based) - Electricity/eGRID (kgCO2e/MBtu)
ENERGY STAR Certification	<input type="checkbox"/> eGRID Subregion
	<input type="checkbox"/> Emissions Factor - Direct Fuels (kgCO2e/MBtu)
	<input type="checkbox"/> Emissions Factor (Location-Based) - District Steam (kgCO2e/MBtu)
	<input type="checkbox"/> Emissions Factor (Location-Based) - District Hot Water (kgCO2e/MBtu)
	<input type="checkbox"/> Emissions Factor (Location-Based) - District Chilled Water (kgCO2e/MBtu)

[Download Full List of Information & Metrics](#) Selected items: 7 of 50 maximum ([View Selection and Order](#)) [Apply Selection](#) [Cancel](#)

For this report template, which focuses on GHG Emissions, select **Total (Location Based) GHG Emissions (Metric Tons CO2e)**, **Direct GHG Emissions (Metric Tons CO2e)**, and **Indirect (Location Based) GHG Emissions (Metric Tons CO2e)**. Now click on **Energy Performance Metrics**. Figure 34, next page, will be displayed.

Figure 34 Select Energy Performance Metrics

Select Information & Metrics Selected items: 6 of 50 maximum ([View Selection and Order](#))

- Property Information
- Property ID Numbers
- Property Use Details
- Meter Information
- Energy Use by Fuel Source
- Data Accuracy
- Energy Performance Metrics**
- Water Performance Metrics
- Waste Performance Metrics
- Cost Performance Metrics
- Greenhouse Gas Emissions
- Renewable Energy & Green Power
- ENERGY STAR Certification

- Energy Baseline Date
- Energy Current Date
- ENERGY STAR Score
- ENERGY STAR Score Preview for Model Updates
- Site Energy Use (kBtu)
- Source Energy Use (kBtu)
- Site EUI (kBtu/ft²)
- Source EUI (kBtu/ft²)
- Weather Normalized Site Energy Use (kBtu)
- Weather Normalized Source Energy Use (kBtu)
- Weather Normalized Site EUI (kBtu/ft²)
- Weather Normalized Source EUI (kBtu/ft²)
- National Median Site Energy Use (kBtu)
- National Median Source Energy Use (kBtu)
- National Median Site EUI (kBtu/ft²)
- National Median Source EUI (kBtu/ft²)
- % Difference from National Median Site EUI
- % Difference from National Median Source EUI
- Site Energy Use - Adjusted to Current Year (kBtu)
- Site EUI - Adjusted to Current Year (kBtu/ft²)
- Source Energy Use - Adjusted to Current Year (kBtu)
- Source EUI - Adjusted to Current Year (kBtu/ft²)

[Download Full List of Information & Metrics](#) Selected items: 6 of 50 maximum ([View Selection and Order](#)) **Apply Selection** Cancel

Click **Apply Selection**. Figure 35, next page, will be displayed.

Figure 35 Create a Report Template

ENERGY STAR® PortfolioManager®

Welcome usalifecare1: Account Settings | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out

MyPortfolio | Sharing | Reporting | Recognition

Edit Report Template: GHG

- 1 Name Your Template**
Name: *
Please provide a unique name for this template
- 2 Select Timeframe**
Timeframe: * for:
Each property must have 12 full months of data for metrics to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report. Pick the **last day** of the 12 month period that you want.
- 3 Select Properties**
Properties: Selected Items: [1](#)
- 4 Select Information & Metrics**
Information & Metrics: * Selected Items: [9](#)

[Cancel](#)

Tip
As you create and save your templates, they will appear in the Templates & Reports section of the Reporting tab. Keeping the names unique will make it easier for you to find and use your templates.

Tip
If you are planning to use your report template to request information from other people, you only need to select the timeframe and information/metrics. When the people respond to your request, they will select the properties to include.

Click on **Save Template**. Figure 36, next page, will be displayed.

Figure 36 shows the creation of the custom report **template** named “GHG.”

You are now ready to generate a report based on this template.

Figure 35 Your Template has been Successfully Saved

Your template has been successfully saved.

In addition to saving your template for future use, you can go ahead and use it right away to:

- [Generate a Report](#) – Pull information you have selected from your account and into your template to create a report for download.
- [Request Data from Others](#) – Ask other people to fill out your template with information from their accounts.
- [Share Template with Others](#) – Give your template to other people so that they can use it to prepare spreadsheets from their accounts.

Keep in Mind: If you have chosen a large number of properties and/or metrics in your template, it may take a little longer to generate your report. [Learn more about creating large spreadsheets.](#)

Charts & Graphs



How much indoor water do I use on a per square foot basis?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Scorecard](#)
- [Water Scorecard](#)

Data Requests from Others **My Reports and Templates** ENERGY STAR Reports [Create a New Template](#)

Name	Status	Action
 GHG	Last Modified: 7/08/2024 4:50 PM	I want to... <input type="button" value="v"/>

Under the **Action** dropdown box select **Generate New Report**. Figure 36, next page, will be displayed.

Figure 36 Your New Report has been Generated

MyPortfolio Sharing **Reporting** Recognition

Charts & Graphs



Weather Normalized Source EUI
How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Scorecard](#)
- [Water Scorecard](#)

Data Requests from Others **My Reports and Templates** ENERGY STAR Reports [Create a New Template](#)

 Your new report(s) has been generated

Name	Status	Action
 GHG	 Generated: 7/09/2024 10:12 AM	I want to... <input type="text"/>

First Previous Page 1 of 1 Next Last 10

Refresh the screen in your browser to see if it's ready.

Under the **Action** dropdown box select **View Current Report**.

The report is displayed as shown in Figures 37 and 38.

Figure 37 View Report: GHG

View Report: GHG

Date Generated: 07/15/2024 07:44 PM EDT
 Number of properties in report: 1
 Comparing Baseline Year vs. Current Year

The following displays the data generated from your [report template](#). It includes the information and metrics that you selected for the properties you included. You may "Generate a New Report" to get updated information from the action menu for this report template.

Information and Metrics 1 records

Portfolio Manager Property ID	Property Name	Portfolio Manager Parent Property ID	Parent Property Name	Year Ending	Site EUI (kBtu/ft ²)	Source EUI (kBtu/ft ²)	Total (Location-Based) Emissions (Metric Tons CO ₂ e)
35178187	USA Life Care Campus	Not Applicable: Standalone Property	Not Applicable: Standalone Property	12/31/2019	66.7	151.2	3580.6
35178187	USA Life Care Campus	Not Applicable: Standalone Property	Not Applicable: Standalone Property	12/31/2023	52.8	114.4	2689.2

Figure 38 View Report: GHG

View Report: GHG

Date Generated: 07/15/2024 07:44 PM EDT
 Number of properties in report: 1
 Comparing Baseline Year vs. Current Year

The following displays the data generated from your [report template](#). It includes the information and metrics that you selected for the properties you included. You may "Generate a New Report" to get updated information from the action menu for this report template.

Information and Metrics 1 records

Parent Property Name	Year Ending	Site EUI (kBtu/ft ²)	Source EUI (kBtu/ft ²)	Total (Location-Based) GHG Emissions (Metric Tons CO ₂ e)	Direct GHG Emissions (Metric Tons CO ₂ e)	Indirect (Location-Based) GHG Emissions (Metric Tons CO ₂ e)
Not Applicable: Standalone Property	12/31/2019	66.7	151.2	3580.6	718.1	2862.6
Not Applicable: Standalone Property	12/31/2023	52.8	114.4	2689.2	675.5	2013.6

You can generate other custom reports with different metrics by following these same steps.

[Congratulations!](#)

You have now completed Portfolio Manager 101 for Senior Communities.

Portfolio Manager 101 for Senior Communities

Appendix – Self Check

We recommend that you do a “trial run” to become familiar with Portfolio Manager **before** attempting to create a property based on your actual senior community; you can then check the results against a known outcome.

In the instructions above, in Chapter 3, we noted that you could choose to enter only basic data for your property, in which case Portfolio Manager will not calculate an accurate Energy Star Score.

However, in this Appendix we have provided a complete set of data for you to use for a trial run. We have also provided two spreadsheets with utility data. You would enter all the data provided in the appropriate fields. The results generated by this data are known. If you create an account and fill in the data correctly you should get a Summary screen like the Figure 39 at the end of this document. It shows an Energy Star score and some useful metrics. If you **do not** see the same results there is an error or omission somewhere.

Use the following data for a trial run:

Chapter 1 – Overview No data required for this chapter

Chapter 2 – Creating An Account

Username and password your choice

Your name, job title your choice, need not be your real name

Email must be your real email

Phone your real phone

Country USA

Address Use 319 Maple Drive, Shelburne, VT 05482. This will generate the same weather data as in our example.

Organization name your choice

Primary business Senior Living Community

Year built 1993

Gross Floor Area 489,834 sf

Irrigated area 0

Occupancy 95%

Product provider no

Federal property no

Chapter 3 – Setting Up a Property

Type Multifamily housing

How many buildings?	Use one for this trial run.
Construction Status	Existing
Standard IDs	Nothing required for these four fields
Do any of these apply?	Be sure to check parking, heated swimming pool, and nursing/assisted units.
Percentage nursing	28%

You will now see four “detail” screens for your different uses.

On the screen for **Multifamily housing:**

Gross Floor Area	392,521 sf. Most likely area of the entire property will already be shown. Edit to provide the just the multifamily area here.
Residential Units	250
Low rise	250
Mid-rise, high rise	0
Bedrooms	350
Common entrance	yes
Population type	Dedicated Senior/Independent Living
Subsidized	No
Laundry hook-ups	250
Common hook-ups	3
Heated, cooled	100%

On the screen for **Senior Living Community** (this is the health center and common areas)

Gross floor area	97,313 sf
Maximum residents	98
Average residents	93
Number of units	98
Workers main shift	175
Computers	50
Residential washing	0
Commercial washing	3
Electronic lifts	3
Refrigeration units	3
Heated, cooled	100%
Licensed bed capacity	98

On the screen for **Swimming Pool**

Size	Recreational
Location	Indoor

Months of use 12

On the screen for **Parking**

Open lot 84,300 sf
Partially enclosed 0 sf
Completely enclosed 56,832 sf
Supplemental heating yes

Chapter 4 – Entering Energy Use Information

Sources of your energy select electric meter – 1, and natural gas meter – 1
Natural gas meter units -CCF, starting date – 1/15/2020
Electric meter units – kWh, starting date – 12/11/2019

On the Meter Entries pages

We are attaching two spreadsheets, as found on the SSAFE website that contains this document, one for natural gas and one for electric, with the “sample electric” and “sample natural gas.” You can enter the meter data manually, or try to upload the data from these spreadsheets by following the instructions on the Meter Entries page. Uploading makes it fast and easy, but sometimes is hard to make it work.

To upload from a spreadsheet:

- Download and open their “single meter spreadsheet” from the link on the Meter Entries page.
- Open the appropriate “sample” spreadsheet which we provided.
- Paste the data from the sample sheet to their sheet. Close both sheets.
- Browse for their sheet where you just copied data. Click **Upload**. The meter data should go.

Chapter 5 – Reports

No new data needed for this chapter.

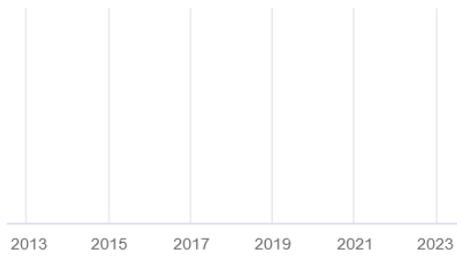
Self Check

When you have finished with Chapter 5 click on the **Summary** tab. If you have done everything correctly you should see the following results. If you don’t go back and make sure you have correctly entered all the data from this Appendix.

Figure 39 Metrics Summary

[Refresh](#) to see **Source EUI Trend**

[Change Metric](#)



2013 2015 2017 2019 2021 2023

[Change Metrics](#)
[Change Time Periods](#)

Metrics Summary

Metric	Dec 2020 (Energy Baseline)	Jan 2024 (Energy Current)	Change
ENERGY STAR Score (1-100)	65	60	-5.00 (-7.70%)
Source EUI (kBtu/ft²)	117.8	116.6	-1.20 (-1.00%)
Site EUI (kBtu/ft²)	66.9	65.3	-1.60 (-2.40%)
Energy Cost (\$)	Not Available	Not Available	N/A
Total (Location-Based) GHG Emissions Intensity (kgCO2e/ft²)	4.0	4.0	0.00 (0.00%)
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A