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How Private Accounts are Protected in EPA’s Energy Performance Rating System within Portfolio Manager

Access to the information you enter into Portfolio Manager regarding your buildings’ features and energy use is password-restricted to you and only those individuals you choose. No information in your account will be examined without your expressed written or verbal permission. All building data and messages communicated over the web are secured by Secure Socket Layer (SSL) encryption to protect data transmissions. No information is transferred openly over the web.

The primary account holder (the person who set up the account) can share access to the account with other people, with varying levels of security:

- **Unofficial Sharing Method:** The primary account holder can just give the other person the name and password. We do not recommend this! Doing so will allow the other person to achieve maximum access to the account, enabling data manipulation and sharing rights to other parties that may not have been vetted by you.
- **Official Sharing Method:** Do this instead! Portfolio Manager provides the ability to share multiple facilities from your account with other users of the system. Users with whom access is being shared (or removed) MUST have a Portfolio Manager user account. This is a level one security feature. No one can obtain access to specific accounts unless they are already registered within Portfolio Manager and specifically provided access by another user.

The MAXIMUM SECURITY access role is “Read Only” and No Optional Rights. EPA recommends this maximum security access role to hospitals that share their account with the ASHE master account to join the E²C initiative. ASHE won’t be able to manipulate any data. ASHE would not be able to set a baseline, nor could it provide access of this account to other users, nor delete the shared facility from your account.

Select Access Rights

STEP 2: Select the set of Access Rights you want to provide this User.

Access Role	Access Rights
<input type="radio"/> Facility/Profile Editor	(1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; (4) Create/Edit a Building Profile
<input type="radio"/> Facility Editor	1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; May NOT create/edit a Building Profile
<input type="radio"/> Profile Editor	1) Create/Edit a Building Profile; May NOT edit any other data for this facility, generate a Statement of Energy Performance or submit an ENERGY STAR Building Application
<input type="radio"/> Read Only	Read Access only; May NOT edit any data for this facility, generate a Statement of Energy Performance, submit an ENERGY STAR Building Application or create/edit a Building Profile

Optional Rights (rights that are added to the selected access role)

Can this user set a baseline for the shared facilities? Yes No
(Note: There is only one baseline date per facility.)

Can this user provide access to the shared facilities with other users? Yes No
(Note: A user cannot delegate any access role greater than their own. See table above. All users who are given this right will be able to assign this right to other users.)

Can this user delete the shared facilities from your account? Yes No
(Note: This right is reserved only for Facility/Profile Editors or Facility Editors.)

The primary account holder can remove access to their accounts anytime, simply by going into the share feature and removing any party that has previously been granted access rights.