Portfolio Manager 201 Frequently Asked Questions

Contents

Other questions?

www.energystar.gov/buildingshelp

Temporary Values

Q1: What is the purpose of a temporary value and how do you use it?

You might find it helpful to enter a temporary value if you are awaiting meter use data from your utility but wish to get an idea of what your ENERGY STAR score would be. A temporary value may be helpful to use if you want to create somewhat of an "outline" of your property in Portfolio Manager while you await exact values. For example, you may be waiting for your property's Gross Floor Area to be verified for a specific property use (vacant space, restaurant/bar, data center, etc.), so you enter a temporary value. This allows you to set up the framework of the property use and update the details (GFA, weekly operating hours, workers, number of computers, etc.) at a later date. Learn more about how to enter a temporary value.

Tenant Data

Q2: How do you set up and report energy use for a property where tenants pay their utilities directly to the utility company?

To receive ENERGY STAR certification, you need to enter 12 months of actual, measured, whole-property energy use data for all fuels used at the property. For multifamily properties, this requires complete energy data for both the common areas and all resident units. For office buildings and warehouses, this includes all common areas and all tenant spaces. Utilities commonly offer aggregated whole building utility data, which would give you anonymized access to the energy use in the tenant spaces. Click here to see a map of utilities who are providing Whole Building Data.

We recognize that some properties can't get aggregated whole building data for their resident or tenant spaces from their utility. In this case, we have two recommended options:

- Install a master meter for the property if it is financially and technologically feasible. A property with a master meter would be eligible for certification.
- Estimate tenant data so that you can still benchmark; but you won't be eligible for certification.

Q3: If I cannot come into compliance because of tenant non-compliance, what are my other options and possible actions to receive and ENERGY STAR certification?

Most utilities will allow you to request the energy data for your tenant from them, but the tenant must authorize the utility's request to share their information before the utility can share the information with you (the property manager). This is not a perfect solution, but it at least takes the responsibility off the tenant to collect meter bills and share them. Instead, the utility can share the meter data with you, the property manager, if they get authorization from the tenant. The other option is to use estimates for your tenant's energy use or use detail information, but the property will not be eligible for an ENERGY STAR certification if estimates are used.

Q4: Do I treat individual tenants as their own buildings even if they are attached to each other?

If tenant spaces are attached to each other, you would benchmark them as all part of the same building. Refer to the following guidance to determine if spaces can be benchmarked as one or multiple buildings: What constitutes a single structure? What if multiple buildings are connected via walkways or common space? If the tenants have different property uses, you would break out the property uses based on square footage according to these guidelines: When should I create separate Property Uses?

Multi-Building/Campus Benchmarking

Q5: Are we required to benchmark each individual building, or can we benchmark as one?

If buildings are separate based on the following guidelines - What constitutes a single structure? What if multiple buildings are connected via walkways or common space? - they may be benchmarked as individual buildings under the same campus.

Q6: If we benchmark a parcel by building individually, are we required to update both the child building and the primary parcel to be benchmarked correctly as the ESPM warns?

If an individual building changes in its use details, like Gross Floor Area, its change on the individual building level must be reflected on the entire campus level. For more information, review the guidance on How to Benchmark a Campus.

Benchmarking Ordinances

Q7: Are there any alerts set up to flag issues when benchmarking for a local ordinance?

There are no alerts set up to flag noncompliance with local benchmarking ordinances. We offer a list of state and local legislation which requires energy use disclosure, and we try very hard to keep the list up to date. Visit the "State/local compliance ordinances" FAQ to find contact information and specific instructions on how to comply with your local benchmarking ordinances.

Q8: Are there any training courses on specific ordinance reporting?

We do not hold webinars on specific local benchmarking. You can watch our three-part benchmarking series to get more information on how to use Portfolio Manager for benchmarking law compliance (Part 1), use benchmarking results to understand your building's performance (Part 2), and benefit from benchmarking compliance with strategies for improving energy (Part 3).

Q9: How do you get the Standard ID # for set up?

You can find your Standard ID from your locality or state benchmarking website. Visit this FAQ to see a list of cities/states that have individual Standard IDs in Portfolio Manager: Standard IDs in Portfolio Manager (force.com).

Sharing Data

Q10: Does the recipient need to manually accept each share, or can you set up automatic acceptance?

A recipient of a shared property must always manually accept the share. This cannot be automated, as some users may not want to be forced to have multiple shared properties appear in their dashboard.

Q11: If I shared a property with a utility, what is the next step to have the utility automatically upload my energy use data to my property's profile in Portfolio Manager?

Properties are not shared directly with the utility but shared with the Service and Product Provider (SPP) or third-party vendor. Once connected, the SPP can upload your property's energy use directly into your Portfolio Manager account. See the FAQ "How do I connect to my SPP" for full instructions on getting connected.