



HOW TO CLASSIFY SENIOR CARE SPACE IN PORTFOLIO MANAGER

EPA's online energy management and tracking tool—Portfolio Manager—allows you to track and assess the energy performance of communities designed to house and provide care and assistance to elderly residents.

A senior care community is eligible to receive an ENERGY STAR score if at least 50 percent of the total number of residential units

are licensed for assisted living and/or skilled nursing. Continuing care retirement communities with predominantly independent living units may be eligible to receive an ENERGY STAR score under this model if certain building characteristics are met. The following illustrations provide guidance on how to define a senior care property for energy performance benchmarking.

SENIOR CARE COMMUNITIES ELIGIBLE TO RECEIVE A SCORE IN PORTFOLIO MANAGER

The graphics below depict the three ways in which a senior care community can be benchmarked using the ENERGY STAR energy performance scale.

A stand-alone senior care building:

A senior care building may be a diverse space that includes independent living, assisted living, dementia care, skilled nursing, and common areas such as dining and recreational rooms.

At least 50 percent of the total number of residential units must be licensed as assisted living and/or skilled nursing to receive a valid score. Independent living must comprise less than 50 percent of the total number of units.

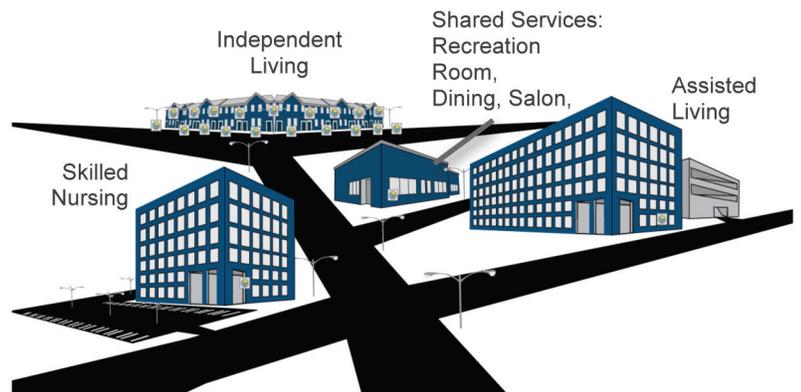
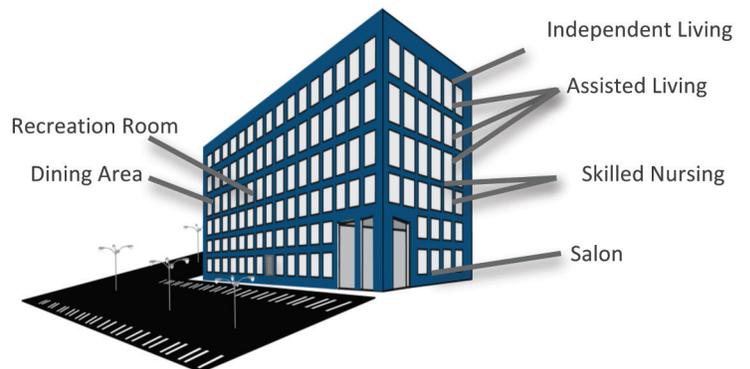
The sum of all square footage and energy usage for the senior care building and supporting functions (e.g., office space, common areas, shared services areas) must be entered into Portfolio Manager.

A multi-building senior care campus where buildings are not separately metered:

A campus includes all buildings that are connected by corridors or walkways and are in close proximity to one another.

At least 50 percent of the total number of residential units on campus must be assisted living and/or skilled nursing to receive a valid score. Independent living must comprise less than 50 percent of the total number of units.

To enter a senior care campus in Portfolio Manager, select the senior care space type and enter all square footage and energy usage of all buildings on campus (e.g., skilled nursing, assisted living, independent living, townhouses) including buildings with support functions (e.g., offices, dining, recreation, common areas).





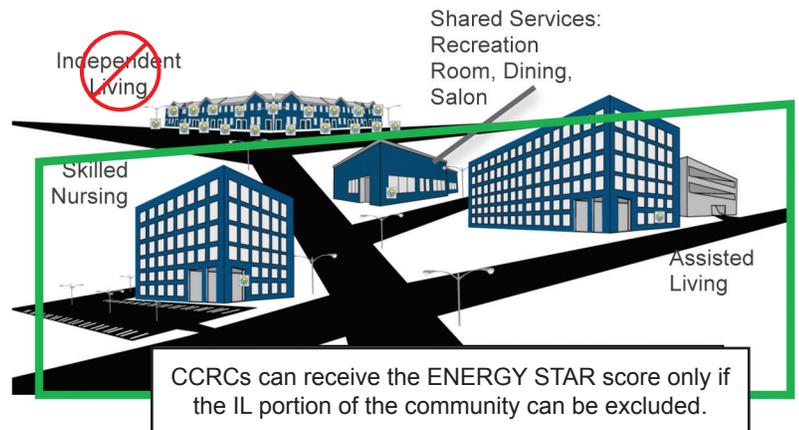
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A continuing care retirement community (CCRC) where independent living buildings are separately metered:

For CCRCs with separately metered, stand-alone independent living (IL) buildings, a valid rating can be generated for the CCRC only by fully excluding the IL buildings from the rest of the campus..

To properly enter a CCRC in Portfolio Manager, aggregate all square footage and energy usage of skilled nursing and assisted living buildings including buildings with support functions (e.g., offices ,dining, recreation, common areas). Buildings that are used by all residents must be included.



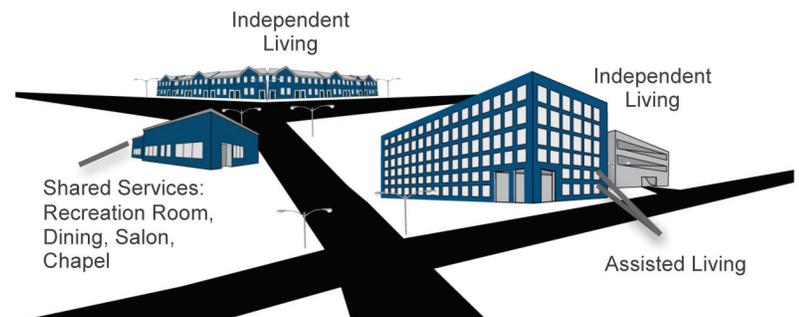
SENIOR CARE COMMUNITIES *NOT* ELIGIBLE TO RECEIVE A SCORE IN PORTFOLIO MANAGER

Communities that are predominantly independent living:

If 50 percent or more of total units in a senior care community are independent living (IL) that are not located in a stand-alone building with separately metered energy use, then the community is not eligible to use the senior care space type in Portfolio Manager.

If more than 50 percent of the independent living units are located in a multi-tenant building (e.g., townhouse, condominium, apartment), communities should use the “Multifamily Housing” space type in Portfolio Manager to benchmark independent living buildings.

Buildings benchmarked as “Multifamily Housing” will not receive a score on the 1-100 scale, but the building will receive a weather-normalized energy use intensity. See [Multifamily Housing Quick Reference Guide](#) for more information.

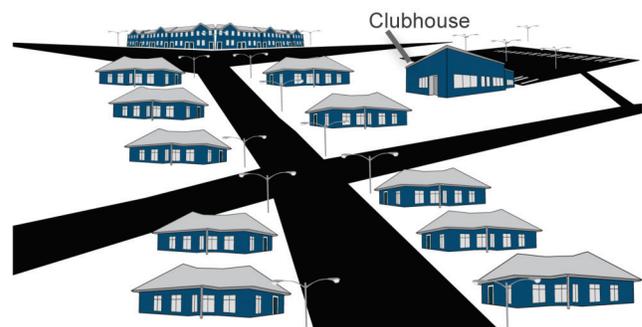


Residential retirement communities or villages:

If a retirement community or villae is comprised of entirely residential homes and townhomes, it is not eligible to use Portfolio Manager.

If the community has already been built, it can use the [ENERGY STAR Home Energy Yardstick](#) for each individual home to assess energy performance and educate residents on energy savings opportunities.

If the community is still in the design phase, it can leverage the [ENERGY STAR New Homes](#) program and guidance on designing homes that qualify for ENERGY STAR for New Homes recognition.





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Senior care communities associated with an acute care hospital campus:

A senior care community associated with a hospital campus cannot receive an ENERGY STAR score independently; only the hospital campus can, assuming the acute care square footage comprises at

least 50 percent of the total campus space including the senior care community. If so, the hospital campus square footage and energy use entered in Portfolio Manager should include the square footage and energy consumption of the senior care community. See [Acute Care and Children's Hospital Quick Reference Guide](#) for more information.

SECONDARY SPACES

While the majority of the space in a senior care building or community must be aggregated into the senior care space type, there are three spaces that should be defined separately within the property's benchmark. All other space, including office space, exam rooms, retail areas, should be aggregated under the "Senior Care" space type. In the Space Use section you can separately define the following.

Parking Lots and/or Garages

If the property has parking lots and/or garages included in the energy use, enter the parking garage under the "Parking" space type.

Note: If the parking or garage space is sub-metered, do not enter the square footage and energy use in Portfolio Manager.

Data Centers

If the property has a data center, enter this space information under the "Data Center" space type. A data center is for sophisticated computing and server functions. It should not be used to represent a server closet or computer training area.

Swimming Pools

If the property has a swimming pool, enter this space information under the "Swimming Pool" space type.