

Standard Report Templates

EPA’s Portfolio Manager offers you eight standard reports with key metrics and information you can use to easily assess your portfolio’s performance and progress, and thereby make informed business decisions. This document lists the metrics included in each of the eight reports so you can see what each report offers.

Standard Reports

- ✓ Performance Highlights
- ✓ Energy Performance
- ✓ Emissions Performance
- ✓ Water Performance
- ✓ Fuel Performance
- ✓ ENERGY STAR Certification Status
- ✓ Partner of the Year Report
- ✓ Sustainable Buildings Checklist Report

Metrics Included in Every Report

- ✓ Property ID
- ✓ Property Name
- ✓ Parent Property Name
- ✓ City
- ✓ State/Province
- ✓ Postal Code
- ✓ Year Ending Date
- ✓ Property Floor Area

Performance Highlights

| |
|--|
| Energy Cost |
| Site EUI |
| Source EUI |
| Percent Better than National Median Source EUI |
| National Median Source EUI |
| Total GHG Emissions |
| Total Water Use |
| Total Water Cost (All Water Sources) |
| ENERGY STAR Score |

Energy Performance

| |
|--|
| Energy Cost |
| Site EUI |
| Source EUI |
| Percent Better than National Median Source EUI |
| National Median Source EUI |
| National Median Site EUI |
| Site EUI – Adjusted to Current Year |
| Source EUI – Adjusted to Current Year |
| Weather Normalized Site EUI |
| Weather Normalized Source EUI |

Emissions Performance

| |
|-------------------------------|
| Indirect GHG Emissions |
| Direct GHG Emissions |
| Total GHG Emissions |
| Avoided GHG Emissions |
| Net GHG Emissions |
| Electric Distribution Utility |
| eGRID Region |
| eGRID Output Emissions Rate |

Timeframe & Properties

You can select timeframes and properties to include in standard reports. You can also generate multiple reports with different dates or groups of properties in order to view changes in your portfolio in detail.

Water Performance

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|---|
| Total Water Use (All Water Sources) |
| Total Water Cost (All Water Sources) |
| Indoor Water Use (All Water Sources) |
| Indoor Water Cost (All Water Sources) |
| Indoor Water Intensity (All Water Sources) |
| Indoor Water Cost Intensity (All Water Sources) |
| Outdoor Water Use (All Water Sources) |
| Outdoor Water Cost (All Water Sources) |

Fuel Performance

| |
|----------------------------------|
| Site Energy Use |
| Energy Cost |
| Electricity Use – Grid Purchase |
| Electricity (Grid Purchase) Cost |
| Natural Gas Use |
| Natural Gas Cost |
| District Steam Use |
| District Steam Cost |
| Fuel Oil #2 Use |
| Fuel Oil #2 Cost |
| Propane Use |
| Propane Cost |

ENERGY STAR Certification Status

| |
|---|
| ENERGY STAR Score |
| ENERGY STAR Certification – Year(s) Certified |
| ENERGY STAR Certification – Application Status |
| ENERGY STAR Certification – Last Approval Date |
| ENERGY STAR Certification – Next Eligible Date |
| ENERGY STAR Certification – Eligibility |
| Energy Alerts |
| Property Use Alerts |
| Date Property Last Modified |
| Property's Portfolio Manager Account Holder |
| Property's Portfolio Manager Account Holder Email |

Partner of the Year Report

| |
|---|
| Property Type (EPA Calculated) |
| Score |
| Site Energy |
| Source Energy |
| Site EUI |
| Source EUI |
| Total GHG Emissions |
| Weather Normalized Site Energy |
| Weather Normalized Source Energy |
| Weather Normalized Site EUI |
| Weather Normalized Source EUI |
| ENERGY STAR Certification (Year(s) Certified) |

Sustainable Buildings Checklist Report

| ID | Guiding Principle I. Integrated |
|--|---|
| Portfolio Manager Parent Property ID | Team |
| U.S. Agency Designated Covered Facility ID | Goals |
| U.S. Federal Real Property Unique Identifier | Plan |
| Third Party Certification | Occupant Feedback |
| Third Party Certification Target Date of Compliance | Commissioning |
| Third Party Certification Actual Date of Compliance | Guiding Principle II. Energy |
| Portfolio Manager Information | Energy Efficiency (Any Option) |
| Primary Property Type – EPA Calculated | Energy Efficiency – ENERGY STAR Score |
| ENERGY STAR Score | Energy Efficiency – Measured 20% |
| ENERGY STAR Certification – Last Approval Date | Energy Efficiency – Code 20% |
| Energy Use Metrics | Efficient Products |
| Site EUI | Measurement & Verification |
| Source EUI | On-Site Renewable |
| Weather Normalized Site EUI | Benchmarking |
| Weather Normalized Source EUI | Guiding Principle III. Water |
| Site EUI – Adjusted to Current Year | Indoor Water (Any Option) |
| Source EUI – Adjusted to Current Year | Indoor Water – Code 20% |
| Onsite Renewable System Generation | Indoor Water – Measured 20% |
| Onsite Renewable System Electricity Exported | Outdoor Water (Any Option) |
| Electricity – Onsite Renewable System Electricity Used Onsite/Coincident | Outdoor Water – Measured 50% |
| Electricity Sourced from Online Renewable Systems (% of Total Electricity, including Grid Purchase and Onsite) | Outdoor Water – Conventional 50% |
| Total GHG Emissions | Outdoor Water – No Outdoor Water |
| Water Use Metrics | Stormwater |
| Indoor Water Use (All Water Sources) | Efficient Products |
| Indoor Water Intensity (All Water Sources) | Guiding Principle IV. Indoor Environment |
| Outdoor Water Use (All Water Sources) | Ventilation & Thermal Comfort |
| Cost Metrics | Moisture Control |
| Energy Cost | Automated Lighting Controls |
| Energy Cost Intensity | Daylighting & Occupant Controls |
| Total Water Cost (All Water Types) | Daylighting |
| Guiding Principles – Overview | Occupant Controls |
| Actual Date of Compliance | Low-Emitting Materials |
| Target Date of Compliance | Integrated Pest Management |
| Compliance Path | Tobacco Smoke Control |
| Checklist Manager | Guiding Principle V. Materials |
| % Complete (Yes or NA) | Recycled Content |
| % Yes | Biobased Content |
| % Not Applicable | Environmentally Preferred Products |
| % In Process | Waste & Materials Management |
| % No | Ozone Depleting Compounds |
| % Not Assessed | |