How to Register and Benchmark Multifamily Properties and Residential Care Facilities in Portfolio Manager

INSTRUCTION GUIDE

GRRP
GREEN & RESILIENT RETROFIT PROGRAM

How to Benchmark Multifamily and ORCF Properties in Portfolio Manager®

This guidance explains how Multifamily and Section 232 (Office of Residential Care Facilities or ORCF) owners can benchmark their properties and share data with HUD, using the Environmental Protection Agency (EPA)'s ENERGY STAR® Portfolio Manager®.

- Multifamily properties with a Green MIP loan are required to track their energy usage - water consumption tracking is highly encouraged for Green MIP but not required.
- Multifamily properties without a Green MIP loan may also track their energy and water consumption on a voluntary basis. HUD provides a service that would cover benchmarking fees for eligible properties. More information on the service can be found here.
- ORCF properties with a Green MIP loan are required to track energy and water consumption in accordance with Mortgagee Letter 2022-13.

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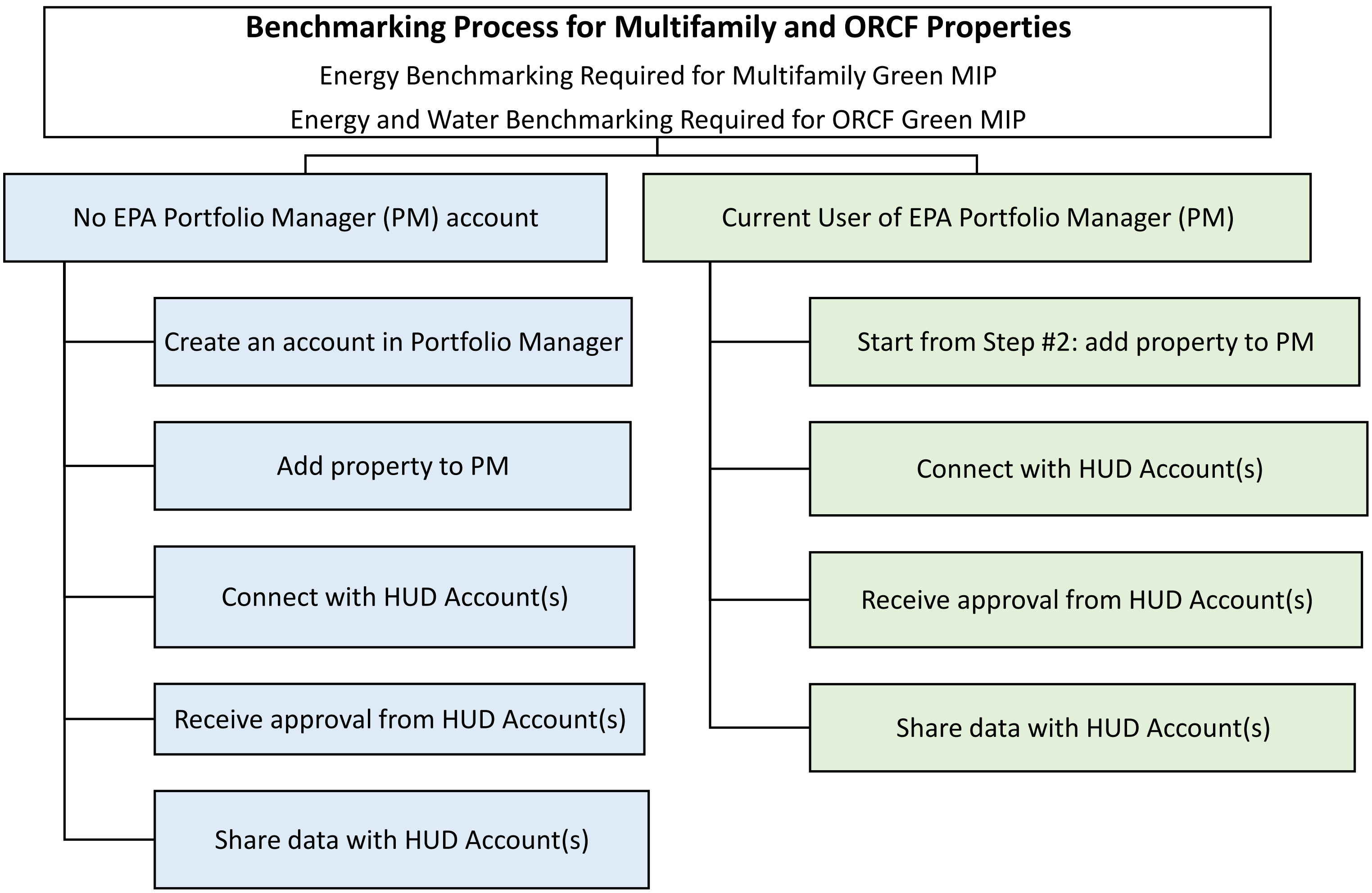
Multifamily properties with a Green MIP loan are required to perform energy benchmarking, with water benchmarking highly encouraged as well. Multifamily properties without a Green MIP loan may participate in energy and water benchmarking on a voluntary basis. ORCF properties with a Green MIP loan are required to benchmark both energy and water. The U.S. Department of Housing and Urban Development (HUD) will use Portfolio Manager to intake this data, which helps measure and track energy and water through a secure online portal. The energy benchmarking data is provided by the Statement of Energy Performance (SEP).

In accordance with the Inflation Reduction Act, HUD intends to provide complimentary technical assistance with benchmarking to volunteer properties receiving assistance under Sections 8 (project-based), 202, and 811. This technical assistance will be provided for a multiyear period, after which property owners will have the ability to leverage the capacity built over that time period to continue annual benchmarking independently.

Property owners possess varying levels of familiarity with the EPA's ENERGY STAR® Portfolio Manager® tool as well as different FHA products. The decision tree below may help guide property owners through the perspective benchmarking process.



1. Create an Account in Portfolio Manager

To gain access to the benchmarking tool, property owner(s) can create a no-cost account at Portfolio Manager Login | ENERGY STAR.

The name of the Portfolio Manager account does not have to be associated with the property entity. However, it is highly recommended that an active e-mail address and organization name are entered so HUD may reach out for data validation.

2. Add Property to Portfolio Manager

Each property, defined as having a unique Integrated Real Estate Management System (iREMS) identifier, must be entered according to the Multifamily Housing and Senior Living Community property type definitions in ENERGY STAR Portfolio Manager. Please view the tutorial here or the Portfolio Manager Quick Start Guide to learn more about how to benchmark a property.

All data requirements to benchmark a property can be downloaded using the Data Collection Worksheet website at ENERGY STAR Portfolio Manager: What data is required to benchmark your property? Once you collect all data points needed, follow the steps below to benchmark your property.

1) After logging into your Portfolio Manager account, Click **Add a Property** on the MyPortfolio tab.

   a. Select Property Type:

      i. For Section 232/ORCF, Healthcare – Senior Living Community must be selected.

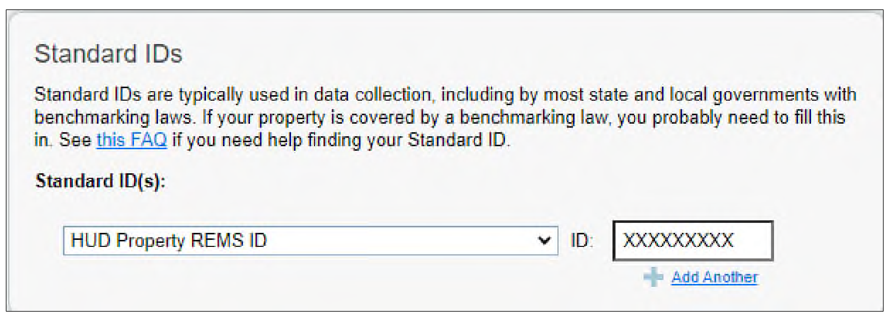
      ii. Otherwise, Multifamily must be selected.

   b. Input the number of physical buildings you consider to be part of your property (unless you are only benchmarking one physical building) and construction status (existing). Click **Get Started**!

2) Enter **Basic Property Information** (use the primary address of the subject property in iREMS registration and loan document) and select the boxes next to the statements that apply to your property. Note the following important points:

   a. Under the Standard IDs section, select **HUD Property REMS ID** using the drop-down menu and enter your property's REMS ID in the box provided.

   ! The iREMS ID must start with an "8" and contain 9 digits.



   b. The property address must match with the associated HUD iREMS transaction or HUD loan. For properties with multiple addresses, the primary address input associated with HUD iREMS transaction should be used. This is typically, but not always, the address of the property's management office.

   c. If there are two or more buildings on the property and building-level data is available for one or more utility types, individual buildings can be benchmarked and linked into a campus. EPA's Portfolio Manager guide, How to Benchmark a Campus | ENERGY STAR, to learn more. **NOTE: Adding individual buildings for properties with multiple buildings is not required by HUD but can help owners compare the energy use intensities of buildings on a campus.**

   d. Select appropriate boxes under "Do any of these apply?" section if you have parking areas, swimming pool or another property type at your property. Click **Continue**.

3) On the next page (under Set up a Property: How is it used?), enter building use details such as Gross Floor Area (GFA), operating hours, and number of workers for each property use type. Avoid using default or temporary values and enter accurate data for your property.

- *NOTE: Mouse over blue font section names to see a definition of that field.*

   a. Click **Add Property**. When you have successfully added your property, you will see the property's Summary tab.

i. If you have additional types of uses on the property, you can add them at any time.

ii. Click the property's Details tab, and then select a Property Use Type from the Add Another Type of Use drop-down menu. Click Add.

iii. Enter Use Details for the property and then click Save Use

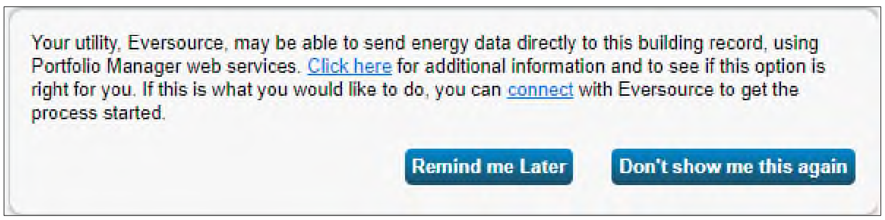
> **Properties with Multiple Use Types**
>
> Some properties include multiple use types, such as restaurants in hotels, salons in senior living communities, and cafeterias in hospitals. As a general rule, if a certain use commonly occurs in the type of property being benchmarked, do not break it out as a separate Property Use Type. Simply include its square footage with the building's primary use.

3. Add Meters and Enter Utility Data and HUD iREMS ID

If you would like a video tutorial on how to enter monthly energy and water data into Portfolio Manager, please view the tutorial here.

! Utilization of HUD's forthcoming free benchmarking service for assisted properties will require both energy and water tracking.

1. Click on your property from the **MyPortfolio** tab, then select either the **Energy** or **Water** tab.



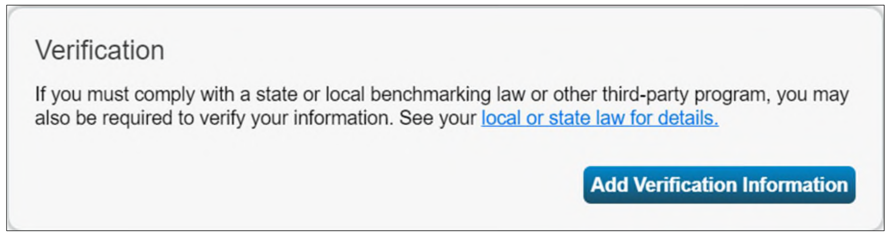
2. Click **Add A Meter** button.
   a. If your building is located in a utility company territory that uses Portfolio Manager web services (automated data exchange services), a note at the top of Energy tab, similar to the following snapshot, will appear. Follow the instructions to learn more about how to set up this connection with your utility company.
3. When you create an energy or water meter:
   a. Select the type of utility used and the number of meters to create and click **Get Started!**
      i. Make sure to include all fuel types for your building. For example, if you have a diesel generator that has delivered fuel, you will record this as a "Meter" to track your deliveries over time. All energy and water types used in your building must be entered.
4. Click on a meter to enter units and first utility bill date. If this meter reflects a bulk fuel purchase for an energy meter, select the **Enter as Delivery?** Checkbox.
5. Click the blue arrow next to each meter to expand the section on the **Your Meter Entries** page. Click **Add Another Entry** under the meter and enter data. You may also choose to record cost here, too. Once you're finished adding entries, click **Continue**.
6. Select the boxes of the meters that total your property's energy or water use on the **Select Meters to Include in Metrics** page. Click **Apply Selections**.

Each HUD application corresponds with an iREMS ID, which must be entered into Portfolio Manager.

! If you have created a parent campus with child buildings, the iREMS ID must be input at the parent property/campus level instead of the child property/individual building.

1. On your **MyPortfolio** page, select the property to which you would like to add an iREMS number.
2. Click on the **Details** tab.
3. Scroll down to view the box on the left named **Unique Identifiers (IDs)** and click **Edit.**
4. On the next page, scroll to the bottom to the box that says **Standard IDs**. In the drop-down on the left, find **HUD Property REMS ID**. Select this, and enter the property's iREMS number. Then click **Save**.

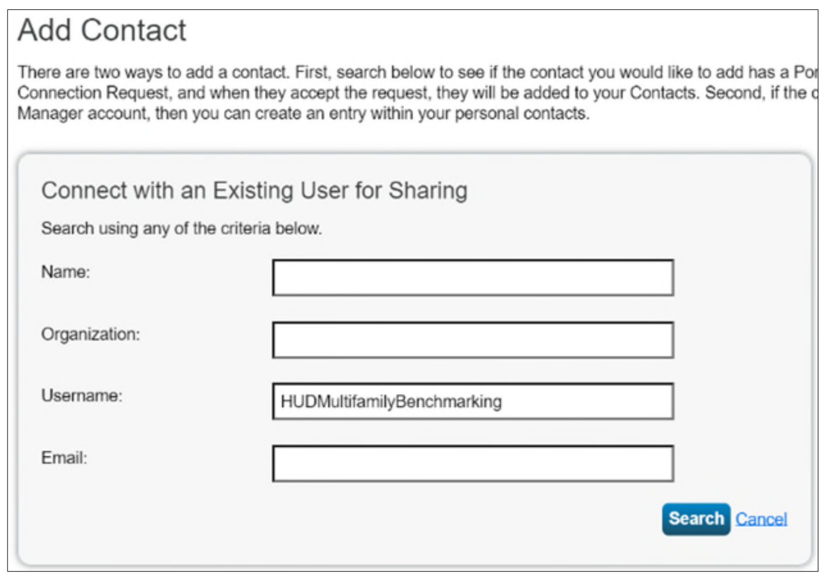
4. Verification of Benchmarking Data



Verification of accuracy of the data entered into Portfolio Manager is required. A Qualified Energy Professional as defined in MAP Guide Chapter 6.4.8 and, as applicable, ORCF's Mortgagee Letter (ML 2022-13) must certify all energy data associated with benchmarking is correct. To add the verification professional's information to a property, go to the Details tab and scroll down to the bottom of the page to the Verification section.

1. Click **Add Verification Information** button.
2. Enter the information for the verifying individual, including the license number, and click **Save**.

5. Share Your Property with HUD

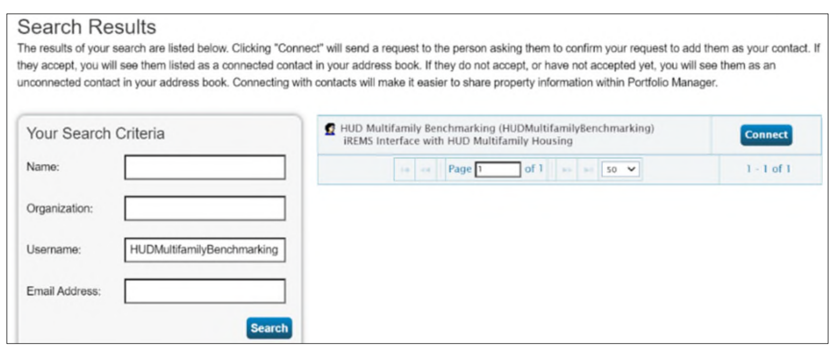


To share a property with HUD, you must first be "connected" to HUD's accounts in Portfolio Manager.

Connect

To send a connection request go to the **Contacts** page:

1. Click Contacts in the upper right-hand corner of the screen. The directory shows the current list of contacts, including those you are currently "connected" with.
2. Click **Add New Contacts/Connections**.
3. Type **HUDMultifamilyBenchmarking** (no spaces) account in Username area and click **Search** button.
    a. For Section 232 properties, please use **HUDORCFBenchmarking**.
4. Once the username is found (see image below) on the **Search Results** pane, click "**Connect**" button to send them a connection request.

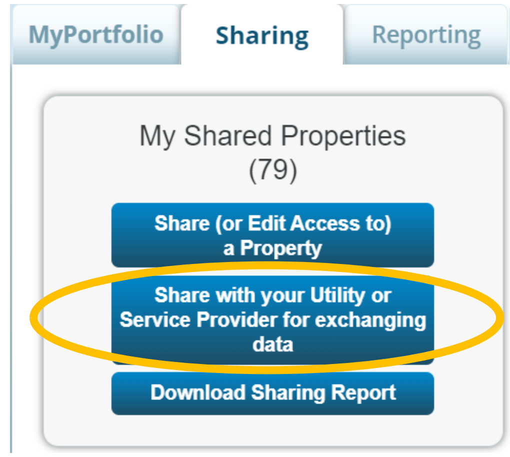


When a connection request is sent, the HUD account will get a "Notification". Once HUD accepts the connection request, confirmation will be received in your Portfolio Manager account.

! Owners must receive HUD's confirmation in their account before proceeding to the next steps.

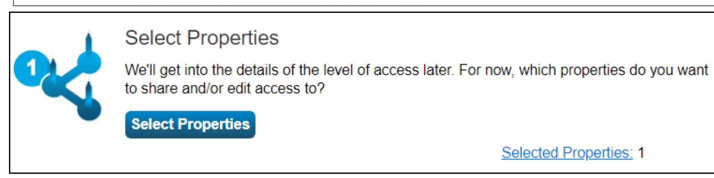
Share

Once the connection between the two accounts is established, users can share the property(ies) with HUD's account. To start sharing, go to the Sharing tab.

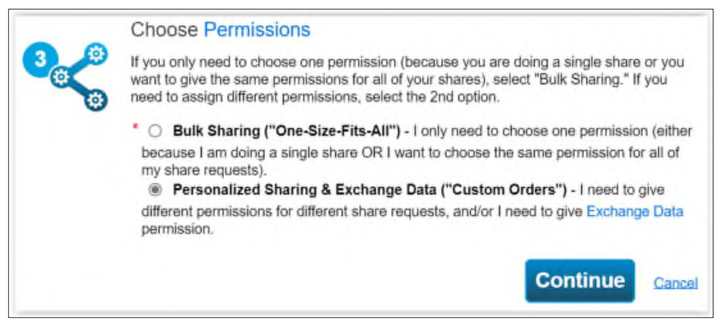


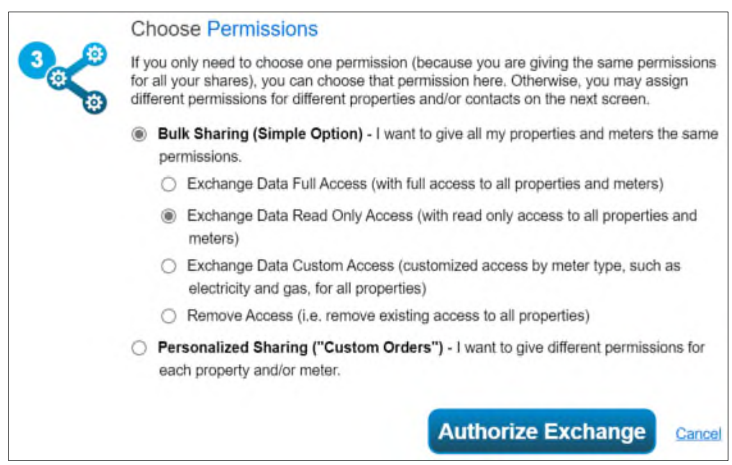
1. Under Sharing tab, Click **Share with your Utility or Service Provider for exchanging data** button.
2. Under **Select People (Account)** section, select the **HUD Multifamily Benchmarking (HUDMultifamilyBenchmarking)** contact. For Section 232 properties, please select **HUDORCFBenchmarking.** If you do not have this account in your list, check to see if HUD has accepted your connection request.

3. Select the properties you want to share by clicking the **Select Properties** button. You can select a single property, multiple properties, a group of properties or all properties in your account. Click **Apply Selection** button.



4. Under **Choose Permissions** section, select **Personalized Sharing & Exchange Data ("Custom Orders")** option and click the **Set Permissions** button.
   a. On the next **Select Permissions for Each Contact** page, check the **Read Only Access** and **Exchange Data** radio buttons.
   b. On the next **Choose Permissions** screen, select **Exchange Data Read Only Access (with read only access to all properties and meters)** option and click **Apply Selections & Authorize Exchange** button.



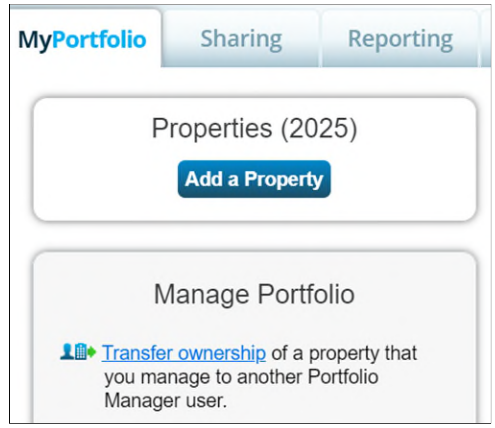


! After you share your property, you will receive two (2) alerts in the Notification section:

i. When a share request is sent to HUD and

ii. When the HUD account has accepted your sharing request.

Transfer a Building into Another Portfolio Manager Account



This step is only applicable if you recently acquired a building that is already benchmarked in Portfolio Manager and would like to acquire the historical data. The building can be transferred in Portfolio Manager. If you would like to start benchmarking your building from scratch (start from Section 1 above), this step can be skipped.

To transfer a building into another account, the owner will need to work with the prior owner (property data administrator in Portfolio Manager) to transfer the property into your account. To transfer a building into another account, click the Transfer Ownership link under MyPortfolio tab, select the building(s) to be transferred, select the new account owner (new building owner) and click the **Transfer Property** button.

6. Manage Your Shared Properties

Review properties you have shared.

On the **Sharing** tab:

- View sharing requests in the **Sharing Notifications** section.
- Ensure that all data shared with HUD has Read Only access.
- View your sharing contacts and the properties you have shared in the table at the bottom of the page.
    - Click on a contact's name to view their account information and the list of properties that you both have access to.
    - Click on a property name to go to the property's **Summary** tab. The **Sharing this Property** table, located at the bottom of the summary tab shows a list of all users with access to the property.

Sharing Report

View details on your shared properties and properties shared with you by downloading the **Sharing Report**. This report is accessible from the **Sharing** tab and shows basic property information, contact information, and permission levels.

- **NOTE:** Everyone who has access to a property will be able to see the names of all others who have access, regardless of their permission levels.

7. EPA ENERGY STAR Portfolio Manager Resources

EPA offers training on a range of topics, including EPA Portfolio Manager guidance on improving building performance, as listed below.

Basic Functionality

- Benchmark Your Building Using ENERGY STAR® Portfolio Manager®
- Training and Resources
- An Overview of Portfolio Manager
- EPA Portfolio Manager quick start guide

Data Entry

- How to get utility data into Portfolio Manager
- Watch Video: How to set up a property in Portfolio Manager
- Portfolio Manager Data Collection Worksheet
- Watch Video: How to set up energy and water meters in Portfolio Manager

Campus Guidance – NOTE: Adding individual building data for properties with multiple buildings is not required by HUD but can help owners compare the energy use intensities of buildings on a campus.

- What constitutes a campus?
- How do I benchmark a campus?
- How do I benchmark buildings that receive energy from shared systems?

Upload Templates

- How do I use the simple spreadsheet upload?
- How do I add properties using Spreadsheet upload templates?

Sharing Data

- How to share properties with other users in Portfolio Manager
- Watch Video: How to share properties in Portfolio Manager

Onsite Renewable Energy Tracking

- How to Benchmark Onsite Renewables in Portfolio Manager
- How do I enter onsite green power (solar/wind)? Part 1- Create Meters
- How do I enter onsite green power (solar/wind)? Part 2 - Enter Data
- How do I enter onsite green power (solar/wind)? Part 3 - Net-Metering
- How do I enter onsite green power (solar/wind)? Part 3a - Net-Metering without the needed data
- How do I enter onsite green power (solar/wind)? Part 4 - Net-Metering for utility updated meters

Water Use Tracking

- How is water tracked in Portfolio Manager?
- How do I enter my water bills that I only pay quarterly (or bi-monthly)?
- What is irrigated area?

Greenhouse Gas Emission Tracking

- ENERGY STAR's website on GHG emission tracking
- GHG Technical References
- How to Track GHG Emissions in Portfolio Manager
- Webinar slides: Tracking GHG Emissions in Portfolio Manager
- Recorded webinar: Tracking GHG Emissions in Portfolio Manager (To view the recording, click the View Event Recordings link on the upper right)