

HUD Multifamily Utility Benchmarking Webinar Series

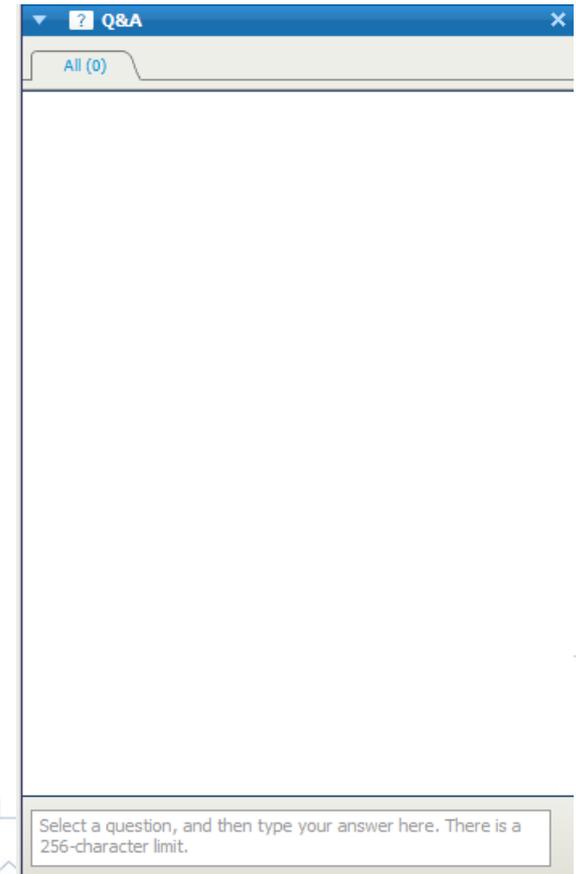
Webinar 4: Using Software and Entering Data for Multifamily Utility Benchmarking

May 4, 2017



Webinar Logistics

- Submit content related questions via the WebEx Q&A box – submit to “All Panelists”
- Submit technical issues related to WebEx in the Chat box – submit to “Host”



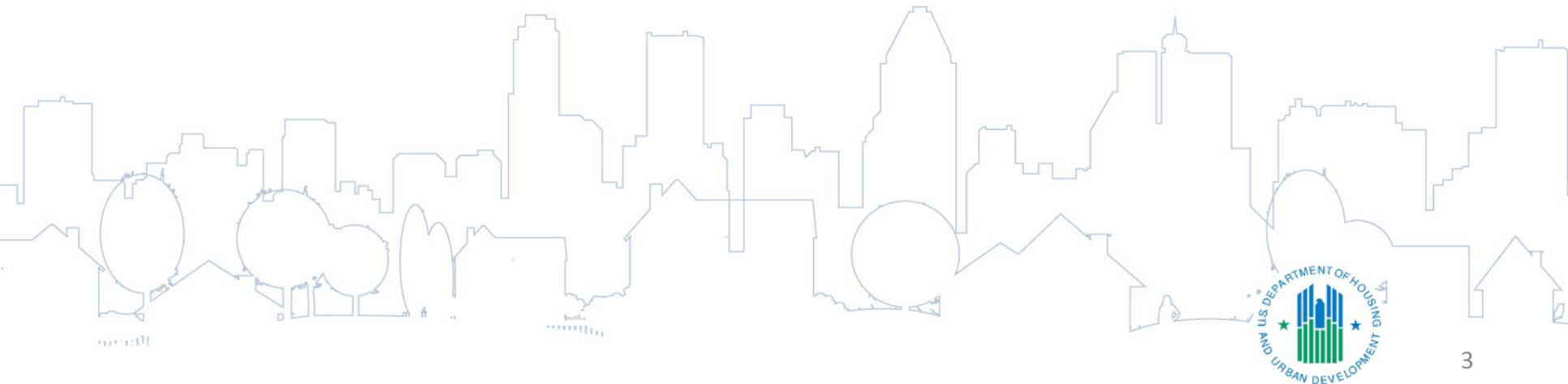
Presenters

Host

- Julia Hustwit,
US Department of Housing and Urban Development

Speakers

- Scott Ledford, ICF
- Andrew Schulte, ICF



Today's Webinar

- Fourth session of a 6-part series
- Attendees are encouraged to register for and join all sessions
- Recordings will be made available
- For more information, and to register, go to “Events and Training” on the [HUD Exchange Utility Benchmarking website](#).

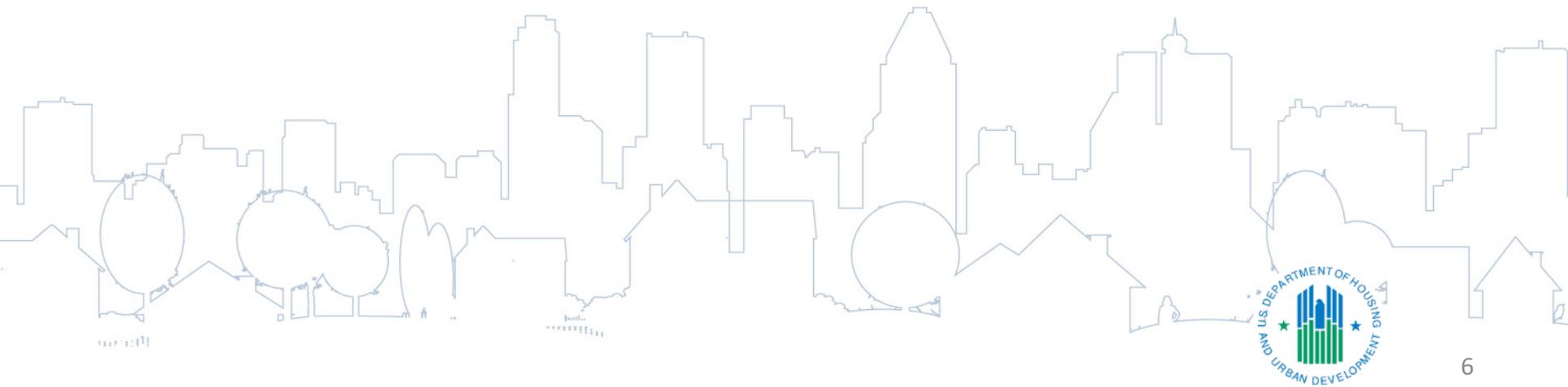


Learning Objectives

- In this session, you will:
 - Learn about using the ENERGY STAR® Portfolio Manager® software tool for multifamily utility benchmarking, including specific guidance relevant to multifamily housing providers;
 - Understand three options for entering data into Portfolio Manager®;
 - Identify how best to track and manage owner-paid and tenant-paid utility data in Portfolio Manager®; and
 - Receive guidance on specific utility benchmarking data issues such as vacancies, bulk deliveries, and tagging properties.



Overview of the ENERGY STAR® Portfolio Manager® Software Tool



What is Portfolio Manager[®]?

- ENERGY STAR[®] [Portfolio Manager](#)[®] is a free, web-based software tool for utility benchmarking
- Currently used to benchmark more than 450,000 properties across the U.S.
- All properties can use Portfolio Manager to measure and track energy and water use intensity (consumption per sq. ft.), greenhouse gas emissions, and a range of calculated performance metrics

The screenshot displays the ENERGY STAR Portfolio Manager interface for a property. The header includes the ENERGY STAR logo and the title "Portfolio Manager". Below the header, there are tabs for "MyPortfolio", "Sharing", "Reporting", and "Recognition". The main content area shows the property name "Parent Property for 3 Building Campus" and its address "123 Main Street, Durham, NC 27701". A "Not eligible to apply for ENERGY STAR Certification" badge is present. The "ENERGY STAR Score (1-100)" is shown as "Current Score: 69" and "Baseline Score: 73".

The interface includes several sections:

- Notifications (0):** A message stating "You have no new notifications."
- Property Profile (To be deleted Fall 2017):** A section for creating a profile for the property, including a photo and additional information.
- Source EUI Trend (kBtu/ft²):** A line graph showing the trend of Source EUI from 2006 to 2016. The y-axis ranges from 0 to 150. The data points for 2014 and 2015 are approximately 92.7 and 96.0, respectively.
- Total GHG Emissions Trend (Metric Tons CO₂e):** A line graph showing the trend of Total GHG Emissions from 2006 to 2016. The y-axis ranges from 0 to 1500. The data points for 2014 and 2015 are approximately 1,172.4 and 1,213.3, respectively.
- Metrics Summary:** A table comparing metrics for Dec 2014 (Energy Baseline) and Dec 2016 (Energy Current), along with the change percentage.
- Check for Possible Data Errors:** A button to run a check for any 12-month time period to see if there are any possible errors found with your data.
- Individual Buildings on this Property (3):** A table listing the buildings and their details.

Metric	Dec 2014 (Energy Baseline)	Dec 2016 (Energy Current)	Change
ENERGY STAR score (1-100)	73	69	-4(-5.5%)
Source EUI (kBtu/ft ²)	92.7	96.0	3.3(3.6%)
Site EUI (kBtu/ft ²)	35.4	36.5	1.1(3.1%)
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions (Metric Tons CO ₂ e)	1,172.4	1,213.3	40.9 (3.5%)
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Name	Use	Gross Floor Area (Sq. Ft.)	Action
Sample Multifamily Building 1	Multifamily Housing	100000	I want to...
Sample Multifamily Building 2	Multifamily Housing	100000	I want to...
Sample Multifamily Building 3	Multifamily Housing	100000	I want to...

It is important that you keep your Property Use Details updated at both the parent and child levels of your campus so that your ENERGY STAR score and other metrics are accurate. [Learn more about keeping Use Details up to date.](#)

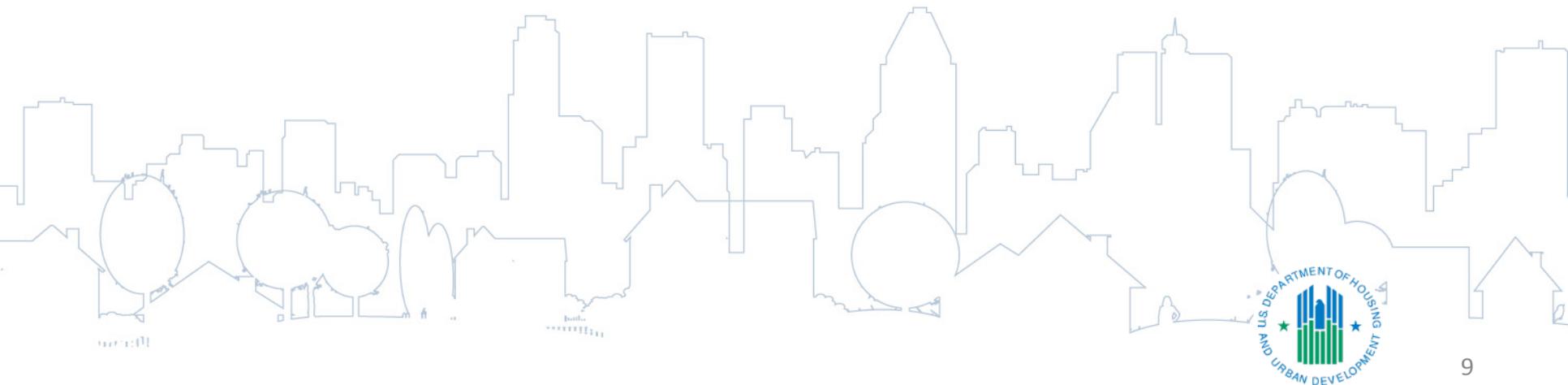
Basic Steps for Benchmarking in Portfolio Manager

- 1) Define your property, including basic descriptive information and specific property use details
- 2) Enter whole-property utility consumption data, accounting for all utility types and all meters
- 3) Obtain and review performance metrics, including the ENERGY STAR 1-100 score
- 4) Use reporting functionality to share your results with other entities, including HUD



3 Primary Options for Getting Data into Portfolio Manager

- a) Manual data entry
- b) Bulk data import templates (spreadsheet upload)
- c) Portfolio Manager web services



Manual Data Entry

- Most basic approach
- One property at a time
- In-tool guidance walks you through the process step-by-step

Get Started Setting Up Meters for Sample Multifamily Building 1

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.

Sources of Your Property's Energy

What kind of energy do you want to track? Please select all that apply.

Electric

purchased from the grid

How Many Meters?

generated onsite with my own solar panels

generated onsite with my own wind turbines

Natural Gas

Propane

Fuel Oil (No. 2)

Diesel

District Steam

District Hot Water

District Chilled Water

Fuel Oil (No. 4)

Fuel Oil (No. 5 and No. 6)

Coal (anthracite)

Coal (bituminous)

Coke

Wood

Kerosene

Fuel Oil (No. 1)

Other:

Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g. electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter.

Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings.

[Get Started!](#) [Cancel](#)

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!

Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

[Learn more about Property Types.](#)

Your Property's Buildings

How many physical buildings do you consider part of your property?

None: My property is part of a building

One: My property is a single building

More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?

Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.

Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.

Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

[Get Started!](#) [Cancel](#)

Do any of these apply?

My property's energy consumption includes parking areas

My property has a heated swimming pool

My property has one or more retail stores

My property has one or more restaurants/cafeterias

My property has nursing/assisted care units

Tip

To set up a property, you'll need information such as gross floor area and operating hours.

Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

Spreadsheet Upload

- Allows you to create or update multiple properties/meters at one time
- 5 core functionalities
 - Add New Properties
 - Add Meters to Existing Properties
 - Add Bills to Existing Meters
 - Edit Basic Information for Existing Properties
 - Update Use Details for Existing Properties
- HUD's optional [Multifamily Utility Benchmarking Plan Template](#) can directly populate some of these spreadsheets, in order to help you organize and upload your data!

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [entering each property manually](#), or adding bills manually. [Learn more below.](#)

What do you want to upload?

- **Add new properties to my account** - To get started, fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in this custom template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template:

Select "Browse" to locate the file on your computer and then select "Upload."

⚠ This is a powerful feature. Be careful!

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

[Close](#)

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

Web Services

- Typically used by 3rd parties (utility providers, utility management service providers) to support property owners in their utility benchmarking efforts
- Web services allow these 3rd parties to directly populate information into Portfolio Manager, on behalf of their customers/clients
- Can reduce the amount of data entry time/effort required by housing providers
- May be offered as a general customer solution by utility providers, or as a fee-for-service offering by other vendors/service providers
- ENERGY STAR maintains a list of the [most active providers using web services](#)



Guidance Materials

- Extensive guidance on the use of Portfolio Manager has been developed by EPA, and is available [online](#).
- How-To Guides and short Demonstration Videos organized around specific actions within the tool
 - Entering property data
 - Entering meter data
 - Using reporting functionality
 - Using sharing functionality
 - Applying for ENERGY STAR Certifications
- Webinars (Portfolio Manager 101, 201, & 301) also offered monthly, with recordings posted

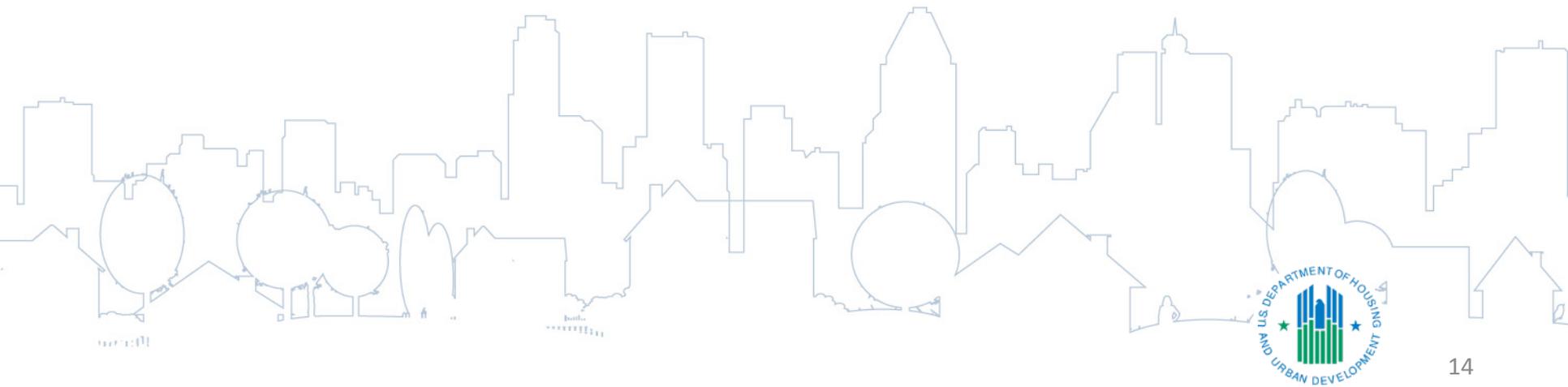
Portfolio Manager demonstration videos

Watch video shorts to learn how to use Portfolio Manager. Choose from eight videos that step you through creating a property to creating reports.

- How to set up a property in Portfolio Manager
- How to set up energy and water meters in Portfolio Manager
- How to use spreadsheet upload templates
- How to share properties in Portfolio Manager
- How to connect with other Portfolio Manager users
- How to request data from Portfolio Manager users
- How to generate standard reports in Portfolio Manager
- How to respond to a data request in Portfolio Manager



Using Portfolio Manager for Multifamily Utility Benchmarking



What Information is Required for Multifamily Properties?

- Basic property data
 - Property Name
 - Property Address
 - Total Gross Floor Area
 - Year Built (or planned for construction completion)
 - Occupancy
 - Number of Buildings
- Specific property use details
 - Total number of Residential Living Units
 - Number of Units in a Low-Rise Setting (1-4 stories)
 - Number of Units in a Mid-Rise Setting (5-9 stories)
 - Number of Units in a High-Rise Setting (10+ stories)
 - Number of Bedrooms
- Whole-property utility consumption data
- Government Subsidized Housing? (Y/N)



Benchmarking at the Whole-Property Level: Use Details



- 100,000 sf
- 110 units
- 120 BR
- Mid-rise



- 150,000 sf
- 150 units
- 200 BR
- Mid-rise



- 370,000 sf
- 380 units
- 520 BR
- Mid-rise



- 120,000 sf
- 120 units
- 200 BR
- Mid-rise



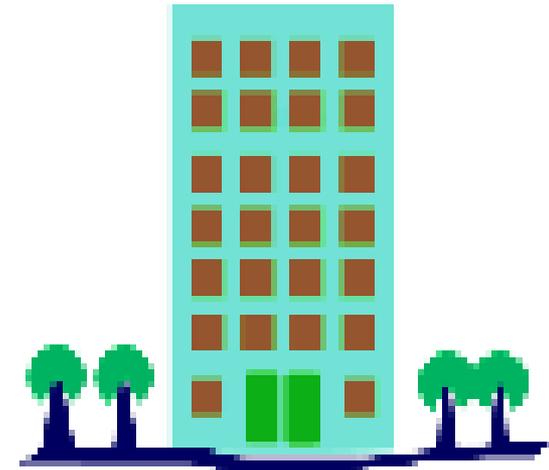
Benchmarking at the Whole-Property Level: Utility Data



- 110 tenant-paid electric meters
- 1 owner-paid electric meter
- 1 owner-paid gas meter
- 1 owner-paid water meter



- 150 tenant-paid electric meters
- 1 owner-paid electric meter
- 1 owner-paid gas meter
- 1 owner-paid water meter



- 1 tenant-paid electric meter
- 1 owner-paid electric meter
- 1 owner-paid gas meter
- 1 owner-paid water meter



- 120 tenant-paid electric meters
- 1 owner-paid electric meter
- 1 owner-paid gas meter
- 1 owner-paid water meter

Translating Sampled Data into Portfolio Manager Inputs

- The example below illustrates how a housing provider can take sampled tenant-paid utility data and convert it into an estimated total tenant-paid consumption figure that can be entered into Portfolio Manager

Example: Using Sample Data to Calculate Estimated Total Tenant-Paid Electricity Consumption for a Property

Housing Unit Type	One-bedroom	Two-bedroom
Number of Housing Units in Property	150	50
Number of Housing Units Sampled	18	6
Total Electricity Consumption for Sample Set	171,000 kWh	84,000 kWh
Average Electricity Consumption Per Unit	$171,000 \div 18 = 9,500$ kWh/unit	$84,000 \div 6 = 14,000$ kWh/unit
Estimated Total Electricity Consumption for All Housing Units by Type	$9,500 * 150 = 1,425,000$ kWh	$14,000 * 50 = 700,000$ kWh
Estimated Total Tenant-Paid Electricity Consumption for Property	$1,425,000 + 700,000 = 2,125,000$ kWh	

Whole-Property Data in Portfolio Manager

Property Uses and Use Details

[View as Diagram](#)

Add Another Type of Use

Add

Name	Property Use Type	Gross Floor Area	Action	
▼ Building Use	Multifamily Housing	370,000 ft ²	I want to... ▼	
	Value	Current As Of	Temporary Value?	
★ Gross Floor Area	370000 ft ²	01/01/2000	No	
★ Total Number of Residential Living Units	380	01/01/2000	No	
★ Number of Residential Living Units in a Low-rise Setting (1-4 stories)	0	01/01/2000	No	
★ Number of Residential Living Units in a Mid-rise Setting (5-9 stories)	380	01/01/2000	No	
★ Number of Residential Living Units in a High-rise Setting (10 or more stories)	0	01/01/2000	No	
★ Number of Bedrooms	520	01/01/2000	No	

Meters - Used to Compute Metrics (3)

Add A Meter

[Change Meter Selections](#)

[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electricity - Owner-Paid 27204532	Electric - Grid	12/31/2016	Yes
Electricity - Tenant-Paid 28080850	Electric - Grid	12/31/2016	Yes
Natural Gas - Owner-Paid 27204533	Natural Gas	12/31/2016	Yes

[Download Annual Totals by Meter](#)

Water Meters - Used to Compute Metrics (1)

Add A Meter

[Change Meter Selections](#)

[View as a Diagram](#)

Name Meter ID	Water Meter Type	Most Recent Bill Date	In Use? (Inactive Date)
Potable Indoor Meter - Owner-Paid 28080855	Potable Indoor	12/31/2016	Yes

[Download Annual Totals by Meter](#)



Be Sure to Mark Sampled Data as an “Estimation”

- Remember: if a tenant-paid meter’s total consumption data is extrapolated from a sample (Method D), you will need to indicate that the consumption entry is an “Estimation”
- This is not necessary if you are using actual data – even if it is aggregated across multiple meters/accounts

Meter Selection: Electricity - Tenant-Paid - 28080850

Basic Meter Information

Name: Electricity - Tenant-Paid [Delete Meter](#)

Meter ID: 28080850

Type: Electric - Grid [Need to change?](#)

Units: kWh (thousand Watt-hours)

Date Meter became Active: 01/01/2000 Still In Use

Date Meter became Inactive:

[Save Changes](#)

Monthly Entries

Display Year(s): Show All Years x

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost (\$)	Estimation	Green Power	Last Updated
<input type="checkbox"/>	1/1/2016	1/31/2016	100,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	2/1/2016	2/29/2016	100,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	3/1/2016	3/31/2016	100,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	4/1/2016	4/30/2016	120,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	5/1/2016	5/31/2016	140,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	6/1/2016	6/30/2016	160,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	7/1/2016	7/31/2016	170,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	8/1/2016	8/31/2016	180,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	9/1/2016	9/30/2016	170,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	10/1/2016	10/31/2016	150,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	11/1/2016	11/30/2016	130,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA
<input type="checkbox"/>	12/1/2016	12/31/2016	110,000		<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/13/2017 SCHULTEA

Accounting for Vacancies at Multifamily Properties

- Vacancies are part of normal operations at multifamily properties, so do not require special adjustments when utility benchmarking
- “Occupancy” information in Portfolio Manager should reflect the average over the 12-month period being benchmarked
- Providers using Method D to sample tenant-paid data should consider whether vacancies in units are short- or long-term when deciding which units to include in the sample set

Sample Multifamily Building 1
123 Main Street, Durham, NC 27701 | [Map It](#)
Portfolio Manager Property ID: 5819180
Year Built: 2000 | Parent Property: [Copy of Sample Multifamily Property - 3 Buildings](#)
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

ENERGY STAR Score (1-100)
Current Score: 86
Baseline Score: 86

Summary | **Details** | Energy | Water | Waste & Materials | Goals | Design

Basic Information
Construction Status: Test property that is one single building
Property GFA - Self-Reported: 100,000 Sq. Ft.
Occupancy: 95% [Edit](#)

Property Uses and Use Details
[View as Diagram](#) Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Multifamily Housing	370,000 ft ²	I want to...
		Property GFA (Buildings): 370,000	used to calculate EUI
		Property GFA (Parking): 0	

Tagging Properties with HUD or USDA IDs in Portfolio Manager

- Housing providers should associate each property with any relevant HUD and/or USDA IDs:
 - HUD Assisted and/or Insured Housing: select “HUD Property REMS ID”
 - HUD Public Housing: select “HUD Property AMP ID”
 - USDA Rural Housing: select “USDA Property AMAS ID”

Sample Multifamily Building 1
123 Main Street, Durham, NC 27701 | Map It
Portfolio Manager Property ID: 5919190
Year Built: 2000 | Parent Property: Copy of Sample Multifamily Property - Buildings
ENERGY STAR Score (1-100)
Current Score: 86
Baseline Score: 86

Basic Information
Construction Status: Test property that is a single building
Property GFA - Self Reported: 100,000 Sq. Ft.
Occupancy: 95%

Property Uses and Use Details
View as Diagram
Add Another Type of Use

Name	Property Use Type	Gross Floor Area	Action
Building Use	Multifamily Housing	370,000 ft²	I want to...

Property GFA (Buildings): 370,000 (used to calculate EUI)
Property GFA (Parking): 0

Unique Identifiers (IDs)
Portfolio Manager ID: 5919190
Custom IDs: None
Standard IDs: None

Standard IDs
Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

Standard ID(s):

Cambridge Building Energy Reporting ID
Chicago Energy Benchmarking ID
CoStar Property ID
Denver Building ID
District of Columbia Building Unique ID
District of Columbia Real Property Unique ID
Evanston Building ID
Green Globes CIEB Project ID
HUD Property AMP ID
HUD Property REMS ID
Kansas City Building Reporting ID
LEED Canada Project ID
LEED US Project ID
Los Angeles Building ID
Minneapolis Building ID
Minneapolis Property ID
Montgomery County, MD Building ID (MBID)
NYC Borough, Block and Lot (BBL)
NYC Building Identification Number (BIN)
Ontario EWRB ID
Philadelphia Building ID
Portland Building ID
REALPac Energy Benchmarking Program Building Name
San Francisco Building ID
Seattle Building Energy Benchmarking Reporting ID
State of Washington Unique Facilities Identifier (UFI)
U.S. Agency Designated Covered Facility ID
USDA Property AMAS ID



Reminder: HUD's New Tools Can Help With the Data Entry Process

- The [Multifamily Utility Benchmarking Plan Template](#) can load your collected data into the Portfolio Manager “Add Properties,” “Update Properties,” and “Add Meters to Existing Properties” templates

Multifamily Utility Benchmarking Plan (beta version 1.0)
Portfolio Manager Spreadsheet Uploads

Follow the instructions below if you would like to generate pre-formatted spreadsheets using the data collected in this Plan, which can be uploaded directly to your organization's Portfolio Manager account. Always thoroughly review your data for accuracy before and after uploading it to Portfolio Manager; your data is your responsibility.
Note that it may take some time to generate uploads for large portfolios, especially for "Add Meters" uploads with several hundred to several thousand meters.

To Add New Properties in Portfolio Manager:

To generate a spreadsheet to add properties to your organization's Portfolio Manager account:

1. Select the properties you wish to upload from the list below (beginning on row 65 on this worksheet).
Do not select properties that have already been entered in your organization's Portfolio Manager account, as you will end up with duplicate properties in Portfolio Manager.
2. Ensure all required fields are filled out on the Property Information worksheet for the properties you wish to add.
3. Access the [Portfolio Manager Spreadsheet Upload](#) web page and download the "Add Properties" template by clicking the link in the upper right corner (see image at right).
4. Save the downloaded Portfolio Manager template in the same folder as this Plan on your computer, with the name "Add_Properties_en".
5. Click the "Generate 'Add Properties' Spreadsheet Upload" button below. This will create a new "Add_Properties" spreadsheet with a time and date stamp reflecting when it was generated.
6. Carefully check the contents of the newly-created Add Properties spreadsheet to make sure all information is accurate.
7. Back on the Portfolio Manager Spreadsheet Upload web page, select "Add New Properties" in the "Type of Upload" drop-down menu. Click "Browse," select the newly-created Add Properties spreadsheet, and click "Upload."

Generate "Add Properties" Spreadsheet Upload

To Update Use Details in Portfolio Manager:

It is recommended that you take this step immediately after successfully uploading an Add Properties spreadsheet, to avoid intermediary edits in Portfolio Manager that could cause issues.

To generate a spreadsheet to update use details for existing properties within your organization's Portfolio Manager account:

1. Ensure all required fields are filled out on the Property Information worksheet for the properties you wish to update.
2. Access the [Portfolio Manager Spreadsheet Upload](#) web page and click "Create an Upload Template" (see image at right).
3. Select the radio button for "Update Use Details for Existing Properties."
4. Select the properties you wish to update.
5. When prompted to "Select Detailed Information to Include," check only "Multifamily Housing." (Parking and Swimming Pool details should have been added during the "Add Properties" step above.)
6. Leave "1" as the answer to "How many updates for this type of use?" and click "Create & Download Template."
7. Save the downloaded Portfolio Manager spreadsheet template in the same folder as this Plan on your computer, with the name "Update_Use_Details_en".
8. Click the "Generate 'Update Use Details' Spreadsheet Upload" button below. If any error messages appear, resolve the errors and try again.
9. Carefully check the contents of the newly-created Update Use Details spreadsheet to make sure all information is accurate.
10. Back on the Portfolio Manager Spreadsheet Upload web page, select "Update Use Details for Existing Properties" in the "Type of Upload" drop-down menu. Click "Browse," select the newly-created Update Use Details spreadsheet, and click "Upload."
11. Once use details have been successfully uploaded, select "Yes" under "Have Use Details been Updated?" in the table beginning on row 65 below (see tool tip in that column header.)

Add Properties
You can create new properties in Portfolio Manager by filling in this spreadsheet, which requires basic property information, including name, address, gross floor area, Property ID#, and Federal Information (if applicable).
[Add Properties Template](#)

Edit and Manage Information
Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.
[Create an Upload Template](#)

- The [Tenant-Paid Utility Data Sampling Calculator](#) outputs estimated total tenant-paid utility consumption in a format that is ready for entry into Portfolio Manager

Step 6: Obtain Estimated, Aggregate Tenant-Paid Utility Data for Use in ENERGY STAR Portfolio Manager

Select a Property: Example Property
Select a Meter Type: Electricity - Grid Purchase
Unit of Measurement: kWh

Start Date	End Date	Usage	Cost	Estimation
7/1/2016	8/1/2016	9,371.7	\$ 1,175.70	Yes
8/1/2016	9/1/2016	10,027.7	\$ 1,254.42	Yes
9/1/2016	10/1/2016	10,729.6	\$ 1,338.65	Yes
10/1/2016	11/1/2016	11,480.7	\$ 1,428.78	Yes
11/1/2016	12/1/2016	12,284.3	\$ 1,525.22	Yes
12/1/2016	1/1/2017	10,687.4	\$ 1,333.59	Yes
1/1/2017	2/1/2017	9,298.0	\$ 1,166.86	Yes
2/1/2017	3/1/2017	8,089.3	\$ 1,021.81	Yes
3/1/2017	4/1/2017	7,037.7	\$ 895.62	Yes
4/1/2017	5/1/2017	6,122.8	\$ 785.83	Yes
5/1/2017	6/1/2017	6,122.8	\$ 785.83	Yes
6/1/2017	7/1/2017	9,371.7	\$ 1,175.70	Yes

Further Guidance on Specific Benchmarking Issues

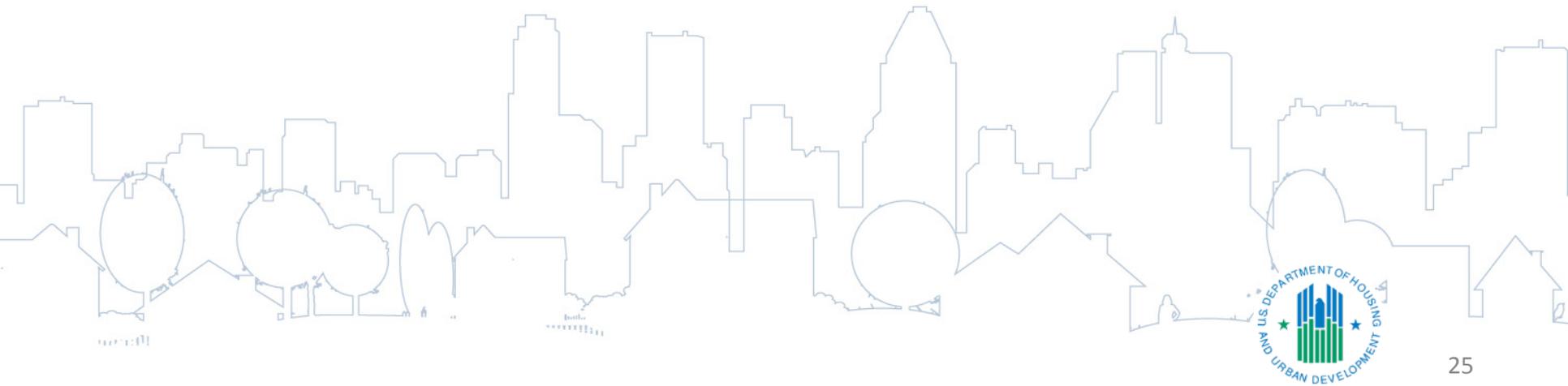
- HUD's new Multifamily Utility Benchmarking Toolkit addresses these and other "Frequently Asked Questions"
- The ENERGY STAR website also contains an [extensive set of FAQs](#) about benchmarking in general, and many about [multifamily properties](#) specifically



What should I do if I have a utility meter that serves multiple properties?	+
What should I do if I have a utility meter that serves multiple buildings within a property?	+
What should I do if my property uses utilities that are not metered or that are not paid for on a consumption basis?	+
What should I do if I use on-site or community-based renewable energy technology?	+
What should I do if I purchase off-site renewable energy technology?	+
What should I do if I have a combined water/sewer bill?	+
How and why should I track utility cost information in Portfolio Manager if only utility consumption information is needed to assess energy/water performance?	+
What should I do if there are gaps or overlaps in time in my utility data?	+
How do I create a sample of tenant-paid utility data if only a portion of a property's housing units receive HUD support (e.g., a 100-unit property has 40 market-rate housing units and 60 HUD-assisted housing units)?	+



What's Next?



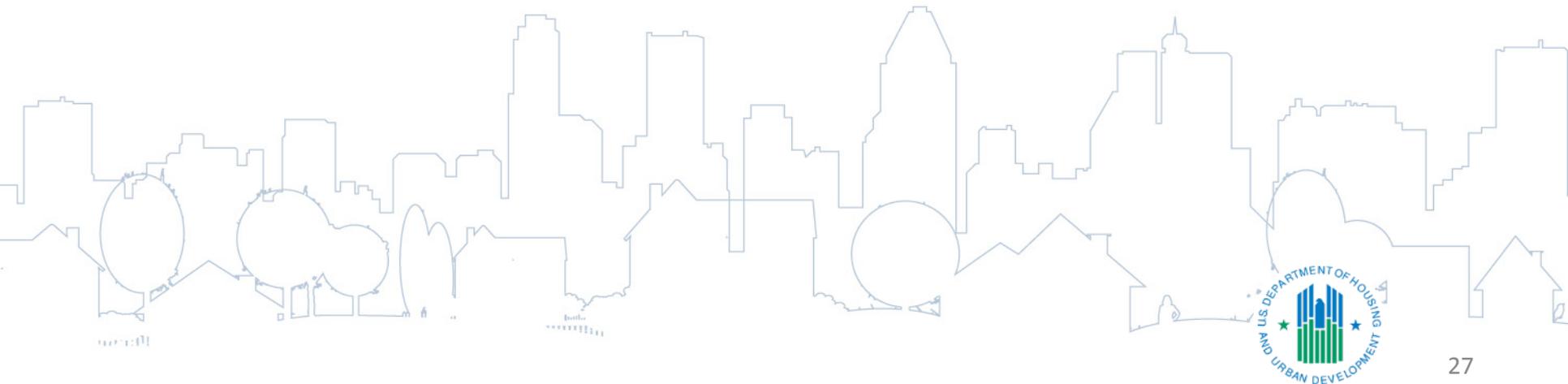
Upcoming Webinars and Events

- May 11
Webinar 5: Sharing Multifamily Utility Benchmarking Results and Building on Success
- May 15 – 17
Better Buildings Summit, Washington, DC
- June 1
Webinar 6: Multifamily Utility Benchmarking Requirements and Funding Opportunities

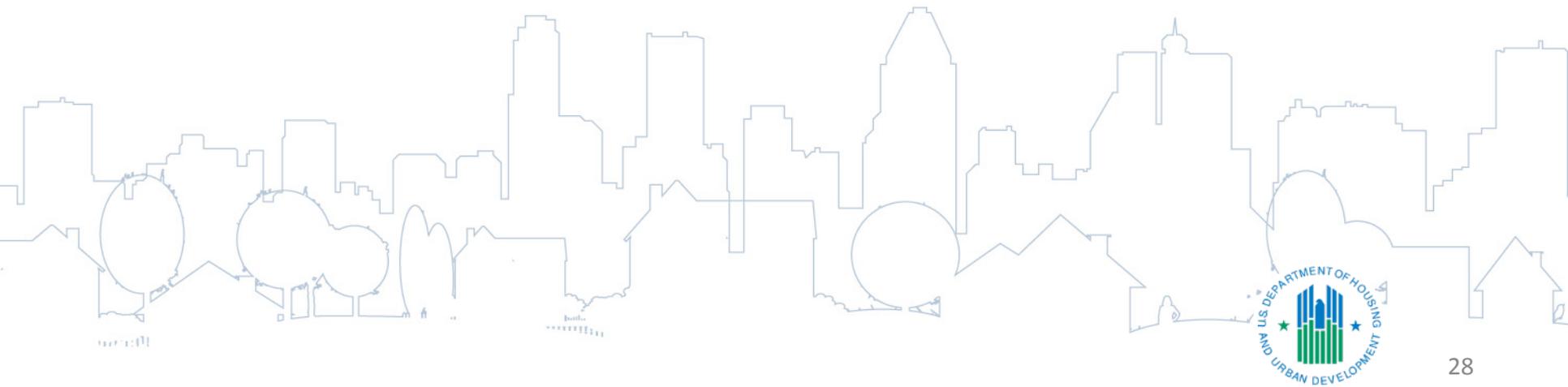


Be Sure to Register!

- Go to “Events and Training” on the [HUD Exchange Utility Benchmarking website](#) for links to each upcoming webinar’s registration page.
- If you missed a previous webinar, go to the Archive section under “Events and Training” for links to each webinar’s recording and other resources.



Questions?



Related Resources

- HUD's [Multifamily Utility Benchmarking Toolkit](#)
- HUD's [Multifamily Utility Benchmarking Plan Template](#)
- HUD's [Tenant-Paid Utility Data Sampling Calculator](#)
- ENERGY STAR [Portfolio Manager Login](#)
- ENERGY STAR [Portfolio Manager Training Resources](#)



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Thank you, and we'll
see you next week for
Webinar 5!

