How to Report for BERDO through ENERGY STAR Portfolio Manager
Meeting Recording

We are recording this presentation. If you don’t wish to be recorded, please turn off your video.

If you do not feel comfortable participating in the discussion, you can share comments or questions in the chat.
Agenda

- BERDO Overview
- ENERGY STAR and Portfolio Manager Overview
- Live Demo
- Q&A
- Supplemental Reporting
BERDO Overview
1. ENERGY STAR PORTFOLIO MANAGER
   The Environmental Protection Agency’s (EPA) Energy Star Portfolio Manager (ESPM) is used for reporting key building characteristics and energy and water usage.

2. BERDO REPORTING FORM
   A new requirement in 2022, this form captures data required for BERDO 2.0 that isn’t included in ESPM.

3. THIRD PARTY DATA VERIFICATION
   A Qualified Energy Professional must review and verify all calendar year 2021 data.
ENERGY STAR and Portfolio Manager Overview
Portfolio Manager® 101
Learning Objectives

In this session, you will become familiar with EPA’s ENERGY STAR Portfolio Manager tool and learn how to:

• Navigate Portfolio Manager
• Add a property and enter its use details
• Enter energy, water, and waste & materials data
• Analyze progress using performance documents, charts and graphs and reports

Note: ENERGY STAR also has short 5 minute videos on these introductory topics available for quick view at www.energystar.gov/buildings/training
Management Tool

- Assess whole building energy and water consumption, plus waste
- Track green power purchase
- Share/report data with others
- Track changes in energy, water, greenhouse gas emissions, and cost over time
- Create custom reports
- Apply for ENERGY STAR certification
Hundreds of metrics, including:

- **Energy use** Source, site, weather normalized, demand
- **Water use** Water use intensity, Water Score (for Multifamily)
- **Waste & Materials** Waste intensity, diversion rate
- **1-100 ENERGY STAR score**
- **GHG emissions** Indirect, direct, total, avoided
Benchmarking is the process of comparing use to gain valuable perspective about building performance

<table>
<thead>
<tr>
<th>Use Portfolio Manager to:</th>
<th>Energy</th>
<th>Water</th>
<th>Waste &amp; Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish a baseline:</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>• Compare current use to baseline over time.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>• Compare median of national sample of similar buildings to baseline.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>• Compare normalized national sample of similar buildings to baseline.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>(ENERGY STAR 1-100 Score)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Multifamily 1-100 Score)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set target reduction goal.</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compare properties in portfolio to each other.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Apply for recognition (eligible space types).</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(ENERGY STAR Certification)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The 1-100 ENERGY STAR Score

One simple number understood by ALL stakeholders.
Property types with 1-100 ENERGY STAR scores

*Not eligible for ENERGY STAR Certification

- Bank Branch
- Barracks*
- Courthouses
- Data Centers
- Distribution Centers
- Financial Offices
- Hospitals
- Hotels
- K-12 Schools
- Office Buildings
- Medical Offices*
- Multifamily Housing
- Residence Hall/Dormitory*
- Retail Stores
- Senior Living Communities
- Supermarkets
- Warehouses
- Wastewater Treatment Plants*
- Wholesale club/Supercents
- Worship Facilities

*Not eligible for ENERGY STAR Certification
ENERGY STAR Score for Multi-Use Properties

Eligible for Score  ☑️  Ineligible for Score  ❌

Bldg. 1
- Office 60%
- Warehouse 40%

Bldg. 2
- Office 60%
- Laboratory 40%

Bldg. 3
- Hotel 60%
- Dry Cleaning 15%
- Office 25%

Bldg. 4
- Office 40%
- Warehouse 40%
- Data Center 20%
The tool has been adapted to include Canadian weather data, postal codes, both official languages, the metric system and other data specific to Canada.

Scores are based on a model developed by Natural Resources Canada using data from Canadian buildings.

Please direct all questions about Canadian properties to Natural Resources Canada.

Property types include:
- Distribution Center
- Financial Office
- K-12 School
- Hospitals
- Ice Rinks/Curling Rinks
- Medical Office
- Non-Refrigerated Warehouse
- Office
- Residential Care Facility
- Self-Storage Facility
- Senior Care Community
- Supermarket/Grocery Store
Pop Quiz!

1. Portfolio Manager can be used to benchmark building performance for which resource types?
   a. Energy
   b. Water
   c. Waste
   d. All of the above

2. True or False: If your building is not eligible for the 1-100 ENERGY STAR score, you cannot benchmark in Portfolio Manager.
   a. True
   b. False
Pop Quiz!

1. Portfolio Manager can be used to benchmark building performance for which resource types?
   a. Energy
   b. Water
   c. Waste
   d. All of the above

   You can benchmark any combination of these three resources in Portfolio Manager!

2. True or False: If your building is not eligible for the 1-100 ENERGY STAR score, you cannot benchmark in Portfolio Manager.
   a. True
   b. False

   For property types not eligible for the ENERGY STAR score, there are a variety of other metrics that you can use to track performance other time, including:
   • Site and Source Energy Use Intensity
   • Weather Normalized Energy Use
   • Greenhouse Gas Emissions
   • And dozens more!
To Get Started in Portfolio Manager you will need:

1️⃣ Property information:
   • Primary function
   • Name, address, postal code
   • Year built
   • Gross floor area

2️⃣ Property use details, e.g.:
   • Operating hours
   • No. of computers
   • No. of workers, etc.

3️⃣ At least 12 mos. of consumption data for resource/s you want to track:
   • Property-specific utility bills for all purchased and on-site generated energy and water
   • Quantity of waste and materials recycled, disposed, donated etc.

Use Portfolio Manager’s **data collection worksheet** to gather data upfront for your property type/s

https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet
How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Generate reports to assess progress
Energystar.gov/portfoliomanager

Create a username and password

Log in
Navigate Portfolio Manager

4 portfolio level tabs

MyPortfolio  Sharing  Reporting  Recognition

7 property level tabs

Summary  Details  Energy  Water  Waste & Materials  Goals  Design

Intuitive navigation – multiple ways to get to the same place
Navigate Portfolio Manager

Portfolio level view

Welcome ninaberlin: Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out

1. Portfolio Manager Metric Updates
   On August 27, 2018 performance metrics in Portfolio Manager were updated for U.S. buildings to reflect current market data. You may notice a change in your current and historic 1-100 ENERGY STAR score or other metrics. After logging in for the first time after these updates have been made, you’ll need to click the “Refresh Metrics” button to see your new metrics within the Dashboard. For more information, visit [www.energystar.gov/scoreupdates](http://www.energystar.gov/scoreupdates).

2. Dashboard (Metrics current as of 03/11/2019 12:05 PM EDT)

   - Search by ID or Name

   - Refresh Metrics

   - View All Properties (14)

   - Energy Highlights (14)

   - Add/Edit/Delete Groups

   - Add/Edit/Delete Views

<table>
<thead>
<tr>
<th>Name</th>
<th>Energy Current Date</th>
<th>ENERGY STAR Score</th>
<th>Site EUI (kBtu/ft²)</th>
<th>Source EUI (kBtu/ft²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Antonio Office Building</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Company HQ</td>
<td>04/30/2018</td>
<td>63</td>
<td>62.5</td>
<td>150.2</td>
</tr>
<tr>
<td>Corporate Office</td>
<td>10/31/2018</td>
<td>64</td>
<td>55.6</td>
<td>154.0</td>
</tr>
<tr>
<td>Hotel &amp; Suites</td>
<td>08/31/2018</td>
<td>26</td>
<td>79.4</td>
<td>222.4</td>
</tr>
<tr>
<td>Little Falls Elementary School</td>
<td>04/30/2018</td>
<td>61</td>
<td>62.0</td>
<td>108.7</td>
</tr>
</tbody>
</table>

3. Manage Portfolio

   - Transfer ownership of a property that you manage to another Portfolio Manager user.
Navigate Portfolio Manager

Sample K-12 School (US)
321 Education Way, Phoenix, AZ 85005
Portfolio Manager Property ID: 664951
Year Built: 1950

Property level view

ENERGY STAR Score
(1-100)
Current Score: 85
Baseline Score: 87

Source EUI Trend (kBtu/ft²)
(Chart current as of 05/14/2019 04:03 PM EDT)

Metrics Summary

<table>
<thead>
<tr>
<th>Metric</th>
<th>Dec 2016 (Energy Baseline)</th>
<th>Aug 2018 (Energy Current)</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENERGY STAR Score (1-100)</td>
<td>87</td>
<td>85</td>
<td>2.00 (2.30%)</td>
</tr>
<tr>
<td>Source EUI (kBtu/ft²)</td>
<td>100.3</td>
<td>104.1</td>
<td>4.18 (4.10%)</td>
</tr>
<tr>
<td>Site EUI (kBtu/ft²)</td>
<td>55.1</td>
<td>55.1</td>
<td>2.00 (3.65%)</td>
</tr>
<tr>
<td>Energy Cost ($)</td>
<td>89,000.60</td>
<td>81,513.82</td>
<td>2483.78 (4.20%)</td>
</tr>
<tr>
<td>Total GHG Emissions Intensity (kgCO2e/ft²)</td>
<td>4.9</td>
<td>5.1</td>
<td>0.20 (4.10%)</td>
</tr>
<tr>
<td>Water Use (All Water Sources) (gpcd)</td>
<td>002.7</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Waste (Disposed and Diverted) (Tons)</td>
<td>52.30</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
</tbody>
</table>
How To

• Navigate Portfolio Manager
• Add a property and enter its use details
• Enter energy, water, and waste & materials data
• Generate reports to assess progress
Add a Property
Add a Property: Existing Property

Select Property Type

Select number of buildings

Select construction status

Get Started!
Basic Property Information

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

- Name:
- Country:
- Street Address:
- City/Municipality:
- State/Province:
- Postal Code:
- Year Built:
- Gross Floor Area: [Sq. Ft.] [Temporary Value]
- Irrigated Area: [Sq. Ft.]
- Occupancy: [Select %]

Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. Details on what to include.
Check the statements that apply

Do any of these apply?

- My property's energy consumption includes parking areas
- My property has a Data Center that requires a constant power load of 75 kW or more
- My property has one or more retail stores
- My property has one or more restaurants/cafeterias

Answering these simple questions will help us guide you in entering your property correctly.
Enter Values for Property Use Details

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the onsite preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Floor Area</td>
<td>100,000</td>
<td>1/1/1990</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly Operating Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Floor Area</td>
<td>12,000</td>
<td>1/1/1992</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly Operating Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Workers on Main Shift</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Open or Closed Refrigerators</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area of All Walk-in Refrigerators</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooking Facilities</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent That Can Be Heated</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent That Can Be Cooled</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Property Summary Tab

Supermarket A-1
1214 Main Street, Arlington, VA 22201
Portfolio Manager Property ID: 6830065
Year Built: 1992

Edit

Not eligible to apply for ENERGY STAR Certification

Weather Normalized Source EUI (kBtu/ft²)
Current: N/A
Baseline: N/A

Refresh to see Source EUI Trend

Change Metric

Metrics Summary

<table>
<thead>
<tr>
<th>Metric</th>
<th>Not Available (Energy Baseline)</th>
<th>Not Available (Energy Current)</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENERGY STAR Score (1-100)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Source EUI (kBtu/ft²)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Site EUI (kBtu/ft²)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Energy Cost ($)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Total GHG Emissions intensity (kgCO₂e/ft²)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Water Use (All Water Sources) (gal)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Waste (Disposed and Diverted) (Tons)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Property Summary Tab – Customized Metric Displays

Supermarket A-1
1214 Main Street, Arlington, VA 22201
Portfolio Manager Property ID: 6836965
Year Built: 1992

Refresh to see Source EUI Trend
Change Metric

Metrics Summary

<table>
<thead>
<tr>
<th>Metric</th>
<th>Not Available (Energy Baseline)</th>
<th>Not Available (Energy Current)</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENERGY STAR Score (1-100)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Source EUI (kBtu/ft²)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Site EUI (kBtu/ft²)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Energy Cost ($)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Total GHG Emissions Intensity (kgCO2e/ft²)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Water Use (All Water Sources) (kgal)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Waste (Disposed and Diverted) (Tons)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Which of the following metrics would you like to display?
- ENERGY STAR Score
- Source EUI (kBtu/ft²)
- Site EUI (kBtu/ft²)
- Weather Normalized Site EUI (kBtu/ft²)
- Weather Normalized Source EUI (kBtu/ft²)
- Water/Wastewater Site EUI (kBtu/gpd)
- Water/Wastewater Source EUI (kBtu/gpd)
- Source Energy Use (kBtu)
- Water Use (All Water Sources) (kgal)
- Total Waste (Disposed and Diverted) (Tons)
- Energy Cost ($)  
- Total Water Cost (All Water Sources) ($)  
- Total Waste (Disposed and Diverted) - Cost ($)  
- Total GHG Emissions (Metric Tons CO2e)  
- Total GHG Emissions Intensity (kgCO2e/ft²)  

Select Metric  Cancel
Add and Set Up a Property: More than One Building (Campus)

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
Campus Configurations

Campus

1214 Main Street, Arlington, VA 22201 | Map It
Portfolio Manager Property ID: 6836065
Year Built: 1992

Weather Normalized Source EUI (kBtu/ft²)

Current: N/A
Baseline: N/A

Summary
Details Energy Water Waste & Materials Goals Design

Refresh to see Source EUI Trend

More About Individual Buildings
This property is a multi-building property, and you haven't added any individual buildings. This is optional. You don't have to add individual buildings unless you would like to track performance separately. This will only be possible if you have your buildings metered individually. Also keep in mind that if you enter individual buildings, you will still need to keep use and meter information about the property as a whole up to date in order to receive accurate metrics about your property (and, in some cases, to apply for the ENERGY STAR). Learn more about tracking multi-building properties.
How To

• Navigate Portfolio Manager
• Add a property and enter its use details
• Enter energy, water, and waste & materials data
• Generate reports to assess progress
Meters Tabs

Supermarket A-1
1214 Main Street, Arlington, VA 22201
Portfolio Manager Property ID: 6836065
Year Built: 1992
Edit

Not eligible to apply for ENERGY STAR Certification

Weather Normalized Source EUI (kBtu/ft²)
Current: N/A
Baseline: N/A

Metrics Summary

<table>
<thead>
<tr>
<th>Metric</th>
<th>Not Available (Energy Baseline)</th>
<th>Not Available (Energy Current)</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENERGY STAR Score (1-100)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Source EUI (kBtu/ft²)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Site EUI (kBtu/ft²)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Energy Cost ($)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Total GHG Emissions Intensity (kg CO₂e/ft²)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Water Use (All Water Sources) (kgl)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Waste (Disposed and Diverted) (Tons)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Water Tab

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | Map It
Portfolio Manager Property ID: 6836065
Year Built: 1992

Water Use Intensity (All Water Sources) (gal/ft²)

<table>
<thead>
<tr>
<th>Current WUI:</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baseline WUI:</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Water Meters - Used to Compute Metrics (0)

Add A Meter

In order to receive water metrics for your property, you must provide water meters. You have not entered any meters yet. After entering the meter, you will need to associate it to receive metrics.
Waste & Materials Tab

Supermarket A-1
1214 Main Street, Arlington, VA 22201 | Map It
Portfolio Manager Property ID: 6836065
Year Built: 1992
Edit

Welcome to Waste and Materials Tracking!
Benchmarking your waste and materials (like recycling and donations) is an important part of a comprehensive sustainability strategy. Learn more about waste and materials tracking.

Enter Your Bills

Add A Meter

Weather Normalized Source EUI (kBtu/ft²)

Current: N/A
Baseline: N/A

Not eligible to apply for ENERGY STAR Certification

Meters - Used to Compute Metrics (0)
Energy Meter Tab

Supermarket A-1
1214 Main Street, Arlington, VA 22201
Portfolio Manager Property ID: 6836065
Year Built: 1992

Current: N/A
Baseline: N/A

Meter Summary
0 Energy Meters Total
In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.

Add A Meter
Current Energy Data
Not Available

Enter Your Bills

Meters - Used to Compute Metrics (0)

Add A Meter

There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. Enter information about your energy meters to begin tracking energy usage. After entering the meter, you will need to choose to include it in your metrics.

For a step-by-step guide to entering meter data, see How to get Utility Data into Portfolio Manager.

Four Ways to Enter Bill Data
1. Manually
Enter Additional Information

Get Started Setting Up Meters for Supermarket A-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
- 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. Learn More.

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. Learn More.
About Your Meters

About Your Meters for Supermarket A-1

Enter the information below about your new meters. The meter’s Units and Date Meter became Active are required. You can also change the meter’s name.

2 Energy Meters for Supermarket A-1 (click table to edit)

<table>
<thead>
<tr>
<th>#</th>
<th>Meter Name</th>
<th>Type</th>
<th>Other Type</th>
<th>Units</th>
<th>Date Meter became Active</th>
<th>In Use?</th>
<th>Date Meter became Inactive</th>
<th>Enter as Delivery?</th>
<th>C 1</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Natural Gas</td>
<td>Natural Gas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Electric Grid Motor</td>
<td>Electric - Grid</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Delete Selected Entries
Add Another Entry

Back

Create Meters

Follow Us

Contact Us | Privacy Policy | Browser Requirements | ENERGY STAR Buildings & Plants Website

ENERGY STAR. The simple choice for energy efficiency.
Add Energy Consumption Information

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can continue with setting up your meters and enter your energy bills later.

Your Meter Entries for Supermarket A-1
Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

3 Energy Meter(s) for Supermarket A-1

- Natural Gas [Edit]
- Fuel Oil (No. 2) [Edit]
- Electric Grid Meter [Edit]

Follow Us [Social Media Icons]

Back [Previous Step] | Continue | Cancel

Expand meter by clicking arrow
Add Meter Entries and Fill in Data

How To Guide: Electric Demand Tracking

Add another entry

Use a spreadsheet to upload or copy and paste
Meters to Add to Total Consumption

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for Supermarket A-1 so that we can provide you with the most accurate metrics possible.

Summary

3

Please tell us what your meters represent.

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). Learn More about configuring meters for performance metrics.

Energy Meters

Select all meters to be included in your Energy metrics. (Hint: All meters should be included unless they are sub-meters.)

- Name Meter ID: Fuel Oil (No. 2)
  - 30521002
- Name Meter ID: Natural Gas
  - 30521001
- Name Meter ID: Electric Grid Meter
  - 30521003

Total of 3 meter(s). Tell us what this represents:

- These meter(s) account for the total energy consumption for Supermarket A-1 (a single building).
- These meter(s) do not account for the total energy consumption for Supermarket A-1 (a single building).

Apply Selections
Energy Meters Tab: Meters Added and Displayed

Notification: Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

Supermarket A-1
1214 Main Street, Arlington, VA 22201
Portfolio Manager Property ID: 6835665
Year Built: 1992

Weather Normalized
Source EUI (kBtu/ft²)
Current: N/A
Baseline: N/A

Energy Meters Tab: Meters Added and Displayed

Add or update bills

Meters - Used to Compute Metrics (3)

<table>
<thead>
<tr>
<th>Name</th>
<th>Meter ID</th>
<th>Energy Type</th>
<th>Most Recent Bill Date</th>
<th>In Use? (Inactive Date)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electric Grid Meter</td>
<td>56291144</td>
<td>Electric - Grid</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Fuel Oil (No. 2)</td>
<td>56291143</td>
<td>Fuel Oil (No. 2)</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>56291142</td>
<td>Natural Gas</td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>

Download Annual Totals by Meter
View Meter Data and Manage Bills for Your Property

Monthly Entries

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Usage kWh (thousand Watt-hours)</th>
<th>Total Cost ($)</th>
<th>Estimation</th>
<th>Green Power</th>
<th>Demand (kW)</th>
<th>Demand Cost ($)</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2019</td>
<td>2/1/2019</td>
<td>532.173</td>
<td>39,900.00</td>
<td></td>
<td></td>
<td>1,293</td>
<td>13,304.00</td>
<td></td>
</tr>
<tr>
<td>2/1/2019</td>
<td>3/1/2019</td>
<td>518.833</td>
<td>37,500.00</td>
<td></td>
<td></td>
<td>1,281</td>
<td>12,970.00</td>
<td></td>
</tr>
<tr>
<td>3/1/2019</td>
<td>4/1/2019</td>
<td>516.496</td>
<td>37,245.00</td>
<td></td>
<td></td>
<td>1,255</td>
<td>12,912.00</td>
<td></td>
</tr>
<tr>
<td>4/1/2019</td>
<td>5/1/2019</td>
<td>500.123</td>
<td>35,889.00</td>
<td></td>
<td></td>
<td>1,214</td>
<td>12,503.00</td>
<td></td>
</tr>
</tbody>
</table>

Delete Selected Entries
Add Another Entry
Learn how to copy/paste
Delete All Entries

Upload data in bulk for this meter:

You can use the single-meter spreadsheet to either: "Upload" the file below, or copy and paste the data from the spreadsheet into the table above (Instructions in this FAQ). Use this single-meter spreadsheet template.

Browse... Upload

Save Bills  Cancel
Get Data Into Portfolio Manager

Manual entry

Spreadsheet upload

Web services

Choose the best data management method.
Get Data In: Manually
Get Data In: Spreadsheet Upload

Manage Portfolio

- **Transfer ownership** of a property that you manage to another Portfolio Manager user.
- **Upload and/or update multiple properties** at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.
- **Download your entire portfolio to Excel** or create a custom download.
- **Set a portfolio baseline and/or target** to help measure progress.
- **Add sample properties** to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.

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.

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**
  - Please select type
- **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.

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
Get Data In: ENERGY STAR Web Services

- Some energy service companies and utilities exchange data with Portfolio Manager to:
  - Manage building and utility data for customers
  - Access the ENERGY STAR score and other performance metrics
- To use web services, “connect” and “share” your properties with your web service provider from the Sharing tab
**Get Data In: ENERGY STAR Web Services**

<table>
<thead>
<tr>
<th>Company</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rocky Mountain Power</td>
<td>04/26/2018</td>
</tr>
<tr>
<td>Xcel Energy</td>
<td>04/26/2018</td>
</tr>
<tr>
<td>Commonwealth Edison</td>
<td>04/26/2018</td>
</tr>
<tr>
<td>Los Angeles Department of Water &amp; Power</td>
<td>04/26/2018</td>
</tr>
<tr>
<td>Southern California Edison</td>
<td>04/26/2018</td>
</tr>
<tr>
<td>Salt River Project</td>
<td>04/26/2018</td>
</tr>
<tr>
<td>Pepco</td>
<td>04/26/2018</td>
</tr>
<tr>
<td>Baltimore Gas &amp; Electric</td>
<td>04/26/2018</td>
</tr>
</tbody>
</table>

- Users will have an ENERGY STAR Notification when web services are available for a property.
Get Data In: ENERGY STAR Web Services

- Expand the notification for more information or to connect with the utility; connecting is the first step for using web services.
Pop Quiz!

3. How many ways are there to get data into Portfolio Manager?
   a. One
   b. Two
   c. Three
   d. Four or more
Pop Quiz!

3. How many ways are there to get data into Portfolio Manager?
   a. One
   b. Two
   c. Three
   d. Four or more

You can get data into Portfolio Manager three ways:
   1. Manually (create/update one property or meter at a time)
   2. Using spreadsheet templates
   3. By working with third-party providers that exchange data directly with Portfolio Manager via web services
How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Analyze progress using performance documents, charts and graphs and reports
Reporting Tab

Choose from pre-set chart & graph options

Create and generate templates & reports

Download performance documents
Performance Documents

ENERGY STAR
Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Scorecard
- Water Scorecard
Charts & Graphs

- Source EUI
- Site EUI
- ENERGY STAR score
- Weather normalized source EUI
- Weather normalized site EUI
- Total GHG emissions intensity
- Energy cost intensity
- Indoor water intensity
- Indoor water cost intensity
Charts & Graphs

Source EUI Report

Source Energy Use Intensity (EUI) is a unit of measurement that describes a building's energy use relative to its size. “Source energy” is the total amount of raw fuel that is required to operate the building. In addition to what the building consumes onsite, source energy includes losses that take place during generation, transmission, and distribution of the energy, thereby enabling a complete comparison.

Portfolio Average Source EUI

-5.2 Change in Average Source EUI
183.1 Current Average Source EUI
188.2 Baseline Average Source EUI

Properties Included: 6

Your Properties Compared to the National Median SOI

Source EUI by Group

Source EUI by Property Type

View the next chart

Print or download figures for use externally

Scroll to bottom to view and export raw data
Create and generate templates & reports

Reporting Tab
Standard Reports

- Performance Highlights
- Energy Performance
- Emissions Performance
- Water Performance
- Fuel Performance
- Waste Performance
- ENERGY STAR Certification Status
- Partner of the Year Report
- Sustainable Buildings Checklist Report
4. True or False: Portfolio Manager users must define a custom template if they want to use the Reporting functionality.
   a. True
   b. False
Pop Quiz!

4. True or False: Portfolio Manager users must define a custom template if they want to use the Reporting functionality.
   a. True
   b. False

Portfolio Manager offers a variety of standard, pre-defined Reporting features, such as ENERGY STAR Performance Documents, charts and graphs, and standard progress report templates on energy and greenhouse gas usage.
Recap

We learned how to:

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Analyze progress using performance documents, charts and graphs and reports
Extra Help

- Visit [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp)
  - Extensive list of FAQs
  - Online form to submit technical questions or comments
- Additional Portfolio Manager training resources available at: [www.energystar.gov/buildings/training](http://www.energystar.gov/buildings/training)
  - Step-by-step documents (PDF)
  - Access to recorded trainings and short videos
  - Information on upcoming trainings
- Register for regular webinars at: [http://esbuildings.webex.com](http://esbuildings.webex.com)
Thank you for attending!

Questions?

Slides will be sent to all webinar registrants after today’s session

If you have any questions on Portfolio Manager or the ENERGY STAR program, contact us at:
www.energystar.gov/BuildingsHelp
Supplemental Reporting
BERDO Reporting Form

BERDO Reporting Form Overview

- **The BERDO Reporting Form will be used to:**
  - Claim your properties
  - Update contact information
  - Request extension
  - Submit additional information not collected through Portfolio Manager
  - Submit third party verification

- **One-time six-month extension available to all**
  - **June 15, 2022** reporting and verification deadline without extension
  - **December 15, 2022** reporting and verification deadline with extension
Third Party Verification

Third Party Verification: Overview

- Required in 2022 for 2021 data
- Necessary for compliance with future emissions standards
- Must be completed by credentialed professional not on staff of building owner or property management company
Third Party Verification

Third Party Verification: Summary of data to be verified

Required in 2022

1. Confirm square footage and allocation to appropriate building use is correct in Portfolio Manager
2. Confirm unit count is accurate in Portfolio Manager (residential only)
3. Confirm all energy usage is accounted for in Portfolio Manager
   • All meters are reported and all delivered fuels are accounted for
4. Verify all energy use is accurately reported

Optional for 2022*

1. Confirm eligibility of any RECs
2. Confirm eligibility of any PPAs
3. Confirm use of any backup generation to be exempt from emissions standards.
4. Confirm any EV charging station usage to station usage to be exempt from emissions standard.

*Note: Future regulations will specify what needs to be verified for compliance with emissions standards. We anticipate that at a minimum the four steps above will be required if they are used by a building.
Reporting Tips

Visit boston.gov/berdo for detailed guidance

  - Many things have changed, so don’t assume how you’ve reported in the past will work in 2022.

- **Find your properties on the covered building list**
  - If you have multiple buildings on one tax parcel, you will need to find each building and the corresponding BERDO ID.
Upcoming Events

- BERDO 2.0 101 Webinar
  - Tues., May 24 @ 4:00 pm

- BERDO Office Hours
  - Tues., May 3, 10:00 - 11:30
  - Wed., May 11, 3:30 - 5:00

Visit boston.gov/BERDO to register and to view past webinars.