Lessor Instructions on Reporting of Energy Consumption, Greenhouse Gas Emissions, and Water Usage

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WHAT TO REPORT IN PORTFOLIO MANAGER

This document provides guidance on lessor reporting requirements for energy consumption, greenhouse gas emissions, and water usage in federal leases, as established in Executive Order 14057. It contains background information, general resources, and step-by-step guidance for GSA lessors related to navigating and effectively utilizing the Environmental Protection Agency's (EPA) ENERGY STAR Portfolio Manager tool. Portfolio Manager is the common platform used by commercial real estate building owners to report this data.

I.   Reporting Requirements

Executive Order 14057 requires that for all leases that are **at least 25,000 rentable square feet** (RSF) and where the federal government collectively occupies **at least 75% of the building**, Lessors shall report the following items listed below. "Report" means to connect with the GSA Portfolio Manager account and **share your property information with GSA** through Read Only access. **Note**: Energy consumption and water usage must be reported at the whole-building level, regardless of whether or not the government is only a partial building tenant.

- The amount of **utilities (including water and energy)** consumed at the whole building broken down by utility type;

- All energy and Renewable Energy Credits (RECs) usage associated with the whole building's energy consumption, which will be used to automatically calculate the whole building's **Greenhouse Gas (GHG) Emissions;**

- The amount of waste generated and diverted at the building. Diverted waste refers to all construction and demolition debris, trash, recyclables, and composting material that is diverted from landfill by being recycled, reused, donated, etc. **Note: Waste reporting guidance is still being developed and is not currently required for leases.** Once required, waste reporting guidance will be incorporated into this document.

Consumption Data Overview: As defined by ENERGY STAR, energy consumption and water usage data reporting include, but is not limited to, the number of actual units annually consumed by utility type, and the associated start and end date(s) for that consumption. Even though you can enter bills that are not monthly, you need to meter bills at least every 65 days to generate weather normalized data. For GHG Emissions, data reported includes, but is not limited to, the amount of GHG emissions from on-site fuel combustion (i.e. natural gas) and grid-purchased electricity, and district energy (i.e. district steam, district chilled water).

II.   Reporting Timeline

Reporting Period: Lessors must report all data beginning with the first full calendar year of the lease term. (i.e., The first reporting period for a lease that is effective February 1st, 2024, is

January 1st, 2025 – December 31st, 2025). The full calendar year of data is due on March 31st of the following year. Lessors may choose to upload their data into Portfolio Manager as often as they would like (i.e. monthly, quarterly, annually, etc.) as long as all data for the calendar year reflecting an annual amount is uploaded by the March 31st deadline. Lessors must continue to annually report all data in each full calendar year of their lease for which the lease term is still in effect on the reporting deadline (March 31st). (i.e., a lease that ends on February 1st, 2030, does not have to report data for the prior full calendar year because the lease term ends before the March 31st deadline.) See below for a sample reporting timeline.

- **Example Timeline:**

11/1/2023	Lease is finalized, signed, and lease term begins.
1/1/2024	First full calendar year of the lease begins to run. Lessor starts recording energy consumption and water consumption.
3/31/2025	Energy/GHGs and water reports for the prior 1/1/2024–12/31/2024 full calendar year are due.
3/31/2026	Energy/GHGs and water reports for the prior 1/1/2025–12/31/2025 full calendar year are due.
3/31/2027	Energy/GHGs and water reports for the prior 1/1/2026–12/31/2026 full calendar year are due.
3/31/2028	Energy/GHGs and water reports for the prior 1/1/2027–12/31/2027 full calendar year are due.
3/1/2029	Lease term ends; no reporting due for the prior year.

III.   Data Accuracy and Verification

Data Accuracy: All reported data for energy, GHG emissions, and water must be verified and accurate. Lessors must upload their data to ensure that all data inputs and calculations for the reporting period are accurate **prior to March 31st** for data reported in the previous calendar year. There are two methods that Lessors may use to verify their data:

- **Portfolio Manager Data Quality Checker**: This data checker may be used to check data belonging to a single building at a time. To use this data checker, see the "Data Quality Checker" link on your building's main Summary tab, and select "Check for Possible Errors."
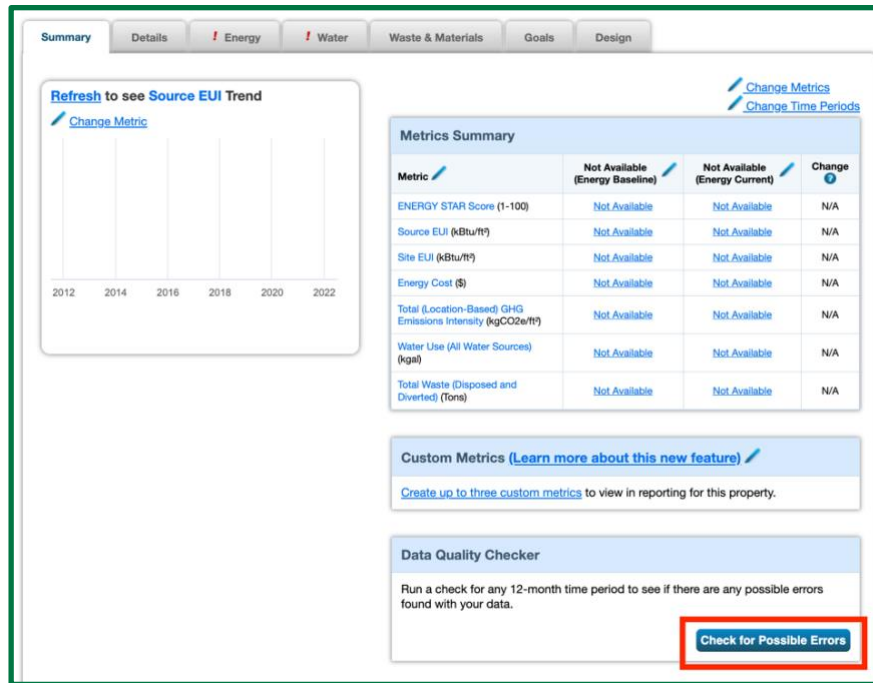
- **Data Quality Stock ENERGY STAR Report**: This data checker may be used to check data for multiple buildings at a time. To access this report, select that "ENERGY STAR Reports" tab in Portfolio Manager, then select the "Data Quality" report. **Note**: This report will not provide as much detail as the Data Quality Checker.
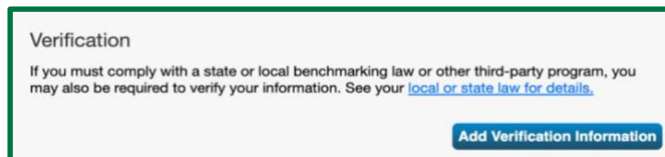
Designating Verification Personnel: To ensure that data is properly reported and accuracy issues can be promptly resolved, you must **designate an individual as a verifier**. This individual can be the Lessor, building manager, engineer, etc.

- To designate a verification person, navigate to your buildings main page and click the "Details" tab.
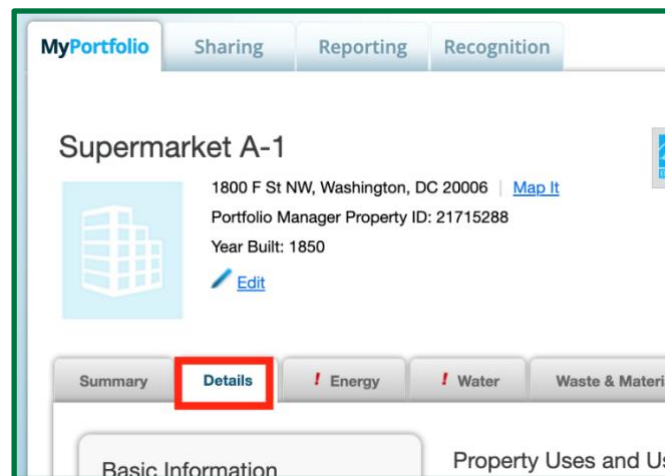
- Next, scroll to the bottom of the page and select **"Add Verification Information."**

- Lastly, fill in all the required information fields and click "Save."

Here are some links to FAQs that will help you identify and resolve data anomalies:

- [How can I find and fix errors in my data?](#)
- [What is the Data Quality Checker? (force.com)](#)
- [What are the "worst" practices in energy benchmarking, and how can I avoid them?](#)
- [Can I see data quality issues for multiple buildings at once?](#)

IV. Automate Utility Data into Portfolio Manager

Authorizing Utilities to Automate Data: Some utility providers provide their data for their customers directly to Portfolio Manager through web services. To determine whether your utility providers use web services, visit the [list of service providers](#) that currently exchange data, or check EPA's [utility data access map](#). If your property's utility provider supports ENERGY STAR's web services, you will be able to connect with them via the **"Connect & Share" features** in Portfolio Manager. This will **allow your utility provider to automatically update** your property's data and have it populated in Portfolio Manager. For more details on these steps, view these [instructions](#) from ENERGY STAR. You will still need to enter all energy and water use data if your energy provider does not provide those web services.

V. Questions and Feedback

Thank you for providing this utility information and for your participation in this federal requirement. For questions or feedback related to this requirement, please contact UCR@gsa.gov. For questions regarding ENERGY STAR Portfolio Manager, please contact EPA Technical Team at [Portfolio Manager Contact Support](#).

HOW TO CREATE AN ACCOUNT AND ADD A PROPERTY IN PORTFOLIO MANAGER

I.   Create an Account

If you do not have an existing Portfolio Manager account, Access the [Portfolio Manager homepage](#) where you can set up an account by filling out a simple web-based form. For more guidance on how to create a Portfolio Manager account, see the "[How to Create an Account in Portfolio Manager](#)" guide.

If you do have an existing Portfolio Manager account, [login](#) to your account. Then, follow the below steps to add and **share your building.**

II.   Add a Property

To get started, log onto Portfolio Manager at www.energystar.gov/portfoliomanager. Then, follow these instructions to create a property and to enter property information. You may want to download a copy a [Portfolio Manager Data Collection Worksheet](#) for your property type to determine what data is required for each space type that you may have within your building or building portfolio:

- Click **Add a Property** on the MyPortfolio tab.
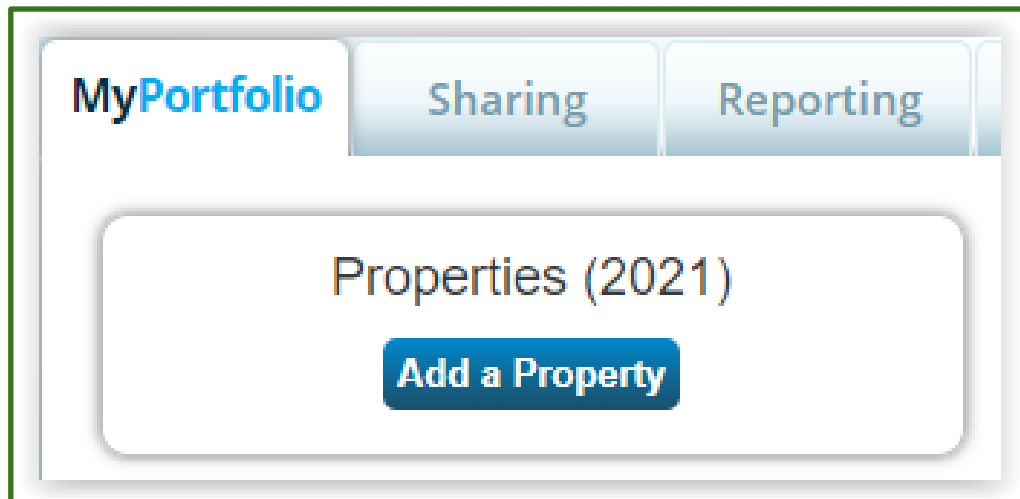
- Answer questions about your property and click **Get Started**!
- Enter **basic property information** and select the boxes next to the statements that apply to your property. Then click **Continue**.

- **Note**: Be sure to enter in the correct occupancy percentage for your entire building. (For example, if 80% of your building is occupied by various tenants, enter "80%" as your occupancy level, even if the government only occupies 10% of the building.) Be sure to update this number if occupancy levels change throughout the lease.

- Enter Use Details such as Gross Floor Area (GFA), operating hours, and number of workers for each type of use. **Note**: Rentable space floor area should not be used for GFA. You can use default or temporary values at this time and enter more accurate data later. **Note**: Hover over the Use Detail in Portfolio Manager to see a definition of each space attribute.

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

- If you have additional types of uses on the property, you can add them at any time:
  - o 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**.
  - o Enter Use Details for the property and then click **Save** Use.
  - o If your property has **10 percent or more vacant space**, follow EPA's vacant space instructions if applicable to your property type.

- For additional guidance, see the EPA Portfolio Manager Quick Start Guide

III. Enter a Unique Identifier

- Once you have added your property, you must enter the **GSA Lease Number**. All Lease numbers are 7-9 characters in length and begin with the letter "L", followed by the 2-letter state abbreviation that the lease is located in (Ex: LVA00374). *Without this ID number, GSA will not be able to locate your building.*

- Go to your building's summary page and click on the **"Details" tab.**

- Under the **"Unique Identifiers (ID)"** section on the left side of the page, click **"Edit".**
- Scroll down to the bottom of the page. Using the drop-down field under "Standard ID(s)", select "**GSA Lease Number**".

- Input your **GSA Lease number**. Each GSA Lease begins with "L", followed by a 2-letter state abbreviation and 4-6 numbers. Click "Save" to save your changes.


- You have now successfully updated your building's unique identifier.
- Once you have reported all calendar year data for your building, you are **required to share** your building with GSA's UCR@gsa.gov account. Follow the steps detailed in *Connecting and Sharing Portfolio Manager Data with GSA* section below to **share your building with GSA** providing **Read Only** access**.**.

IV. Enter your Lease's Occupancy Information

- Navigate to your building's "Details" tab on the main page.
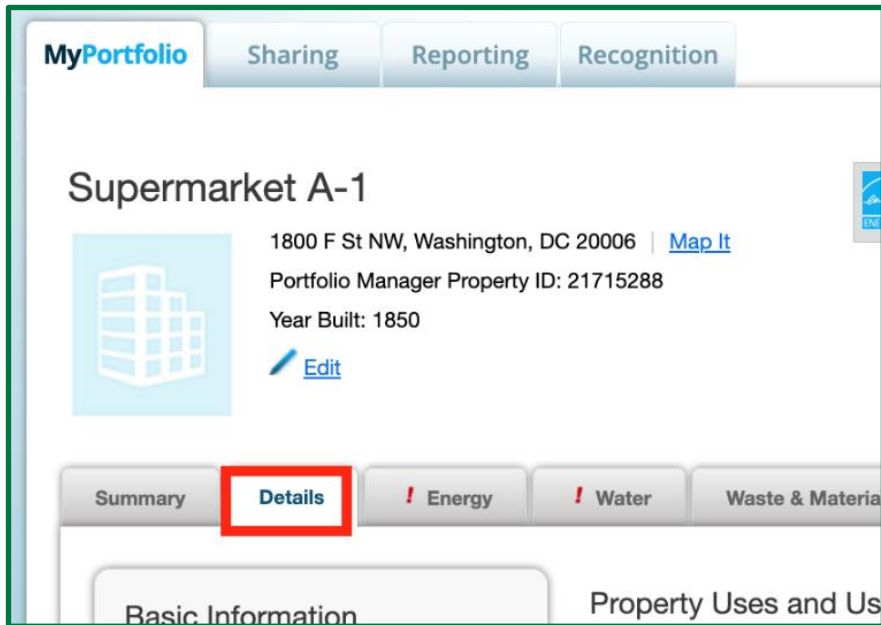
- Next, scroll down to the **"Property Notes"**
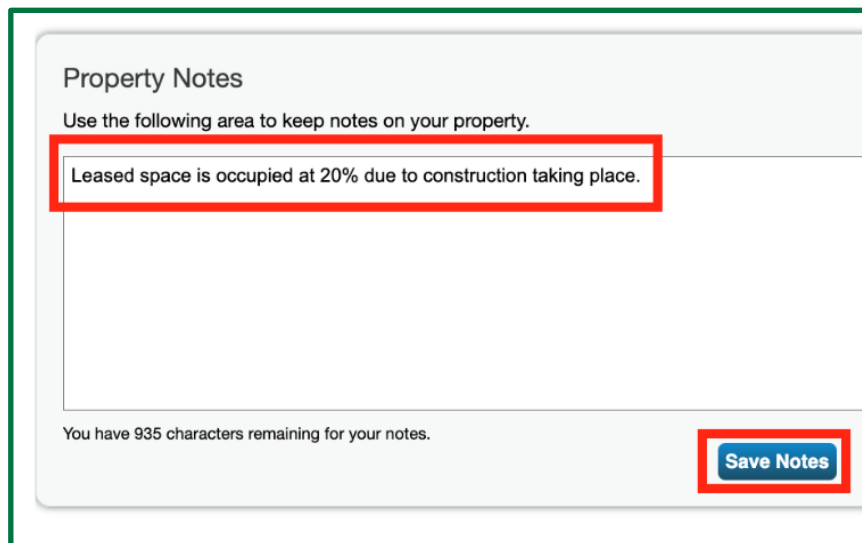
- In the notes section, indicate the level of occupancy within the **leased** space, noting any reasons for low occupancy. Then, click "Save Notes." Be sure to update these notes periodically with any substantial changes in leased occupancy.

CONNECTING AND SHARING PORTFOLIO MANAGER DATA WITH GSA

I. Overview

- Information on Energy Consumption, GHG Emissions, and Water Usage must be **shared with GSA** on an **annual basis**. You can share all this information at once through Portfolio Manager. To start the sharing process explained below, you **must be connected with GSA's Utility Consumption Reporting (UCR) account** (Portfolio Manager ID: UCR@GSA.GOV).

II. Connecting with a Portfolio Manager Account

- Once you have an existing Portfolio Manager account, login to your account and connect with GSA by following the steps below. *Sharing a property is only possible after the initial connection request has been accepted by GSA.*
- From Portfolio Manager, connect with GSA via UCR@gsa.gov.

   o Click **"Contacts"** in the top right-hand corner (next to the "Help" link).
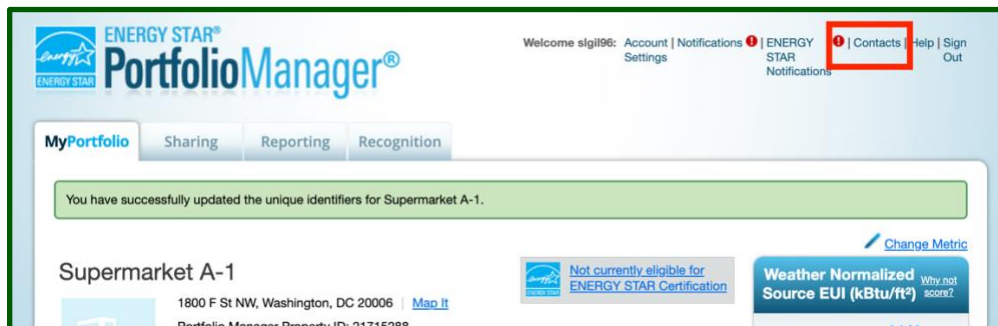
   o Click **Add New Contacts/Connections**
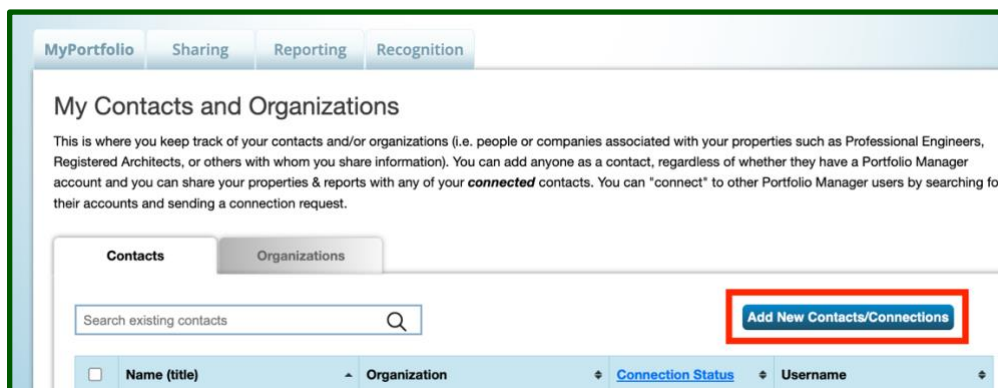
- o Enter UCR@gsa.gov into the email or username line and click "Search".

- o Locate UCR@gsa.gov and click **"Connect".**

- o After UCR@gsa.gov accepts the connection request, it will show up on your list of connected contacts.

III. Step-by-Step Sharing Process

- ● To **share your building's information with GSA**, click the **"Sharing" tab** at the top of the page.
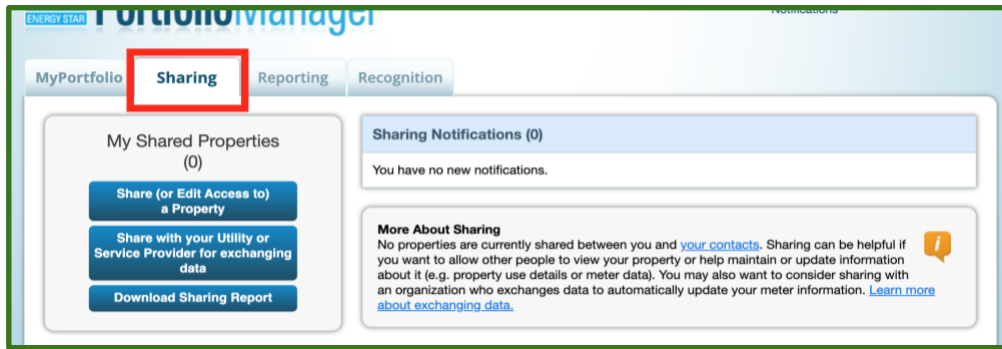
- Click the **"Share (or Edit Access to) a Property"** button.
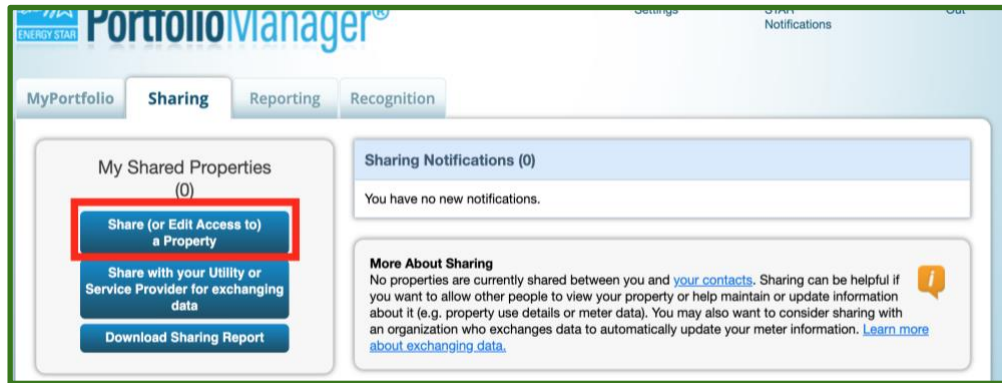
- **Select the property or properties you want to share with GSA**, then select the GSA account UCR@gsa.gov from **"Select People (Accounts) list.** The UCR@gsa.gov account will appear in the contact list once connection is established.

- **Note**: It is important to **ONLY share properties that contain a lease managed by GSA** and where the government occupies 75% of the building.
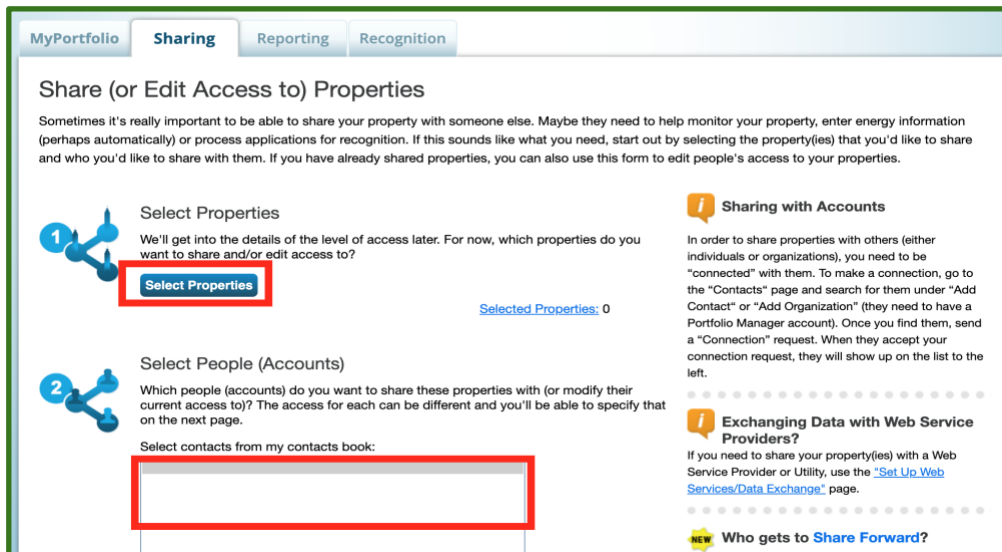
● Select **"Bulk Sharing"** and **"Read Only Access"**.

● Click **"Share Property(ies)."** This action will **allow Portfolio Manager to send a notification to GSA UCR**. Once GSA accepts the sharing request, you're done! **Note:** Shared access stays active indefinitely. To stop sharing at the end of the lease term, see EPA's FAQ: [How do I stop sharing?](#)

ENERGY CONSUMPTION AND GREENHOUSE GAS (GHG) EMISSIONS REPORTING

I. Overview

- Portfolio Manager can be used to track the amount of **renewable and nonrenewable energy** generated for your building.

- ENERGY STAR calculates a building's estimated **GHG emissions** by multiplying your **site's energy use** values by [fuel-specific emissions factors](#).

- In order for ENERGY STAR Portfolio Manager to calculate your building's estimated GHG emissions, you must **create energy meters** that **account for all of your building's energy sources.**

- GHG emissions can be reduced by incorporating renewable energy such as onsite solar or wind production. **You must own the Renewable Energy Credits (RECs) to see the benefit** of onsite green power in your emissions metrics. **Purchasing offsite green power** may impact your avoided emissions. For more information on how Portfolio Manager handles green power, please see the [Portfolio Manager Technical Reference: Green Power | ENERGY STAR](#) guidance document.

II. Step-by-Step Energy Consumption Reporting

- Navigate to the **"Energy" tab**. Then click **"Add a Meter".**

- From here, select **relevant energy sources** used in the building, **indicate how many meters** you would like to track for each resource type, and then click, "Get Started!" **Note**: If you are entering an **onsite renewable energy source**, see section IV for more guidance.

- Next, enter **information about your meters**, such as the date you started using it, and the **units your utility bills report in**. Click **"Create Meters"** and then "Continue."

- **Note**: In Portfolio Manager, the letter **k (as in kWh or kBtu)** is used to represent thousands (whereas some utility companies will use the letter **M for thousands**, especially for natural gas units). In Portfolio Manager, the letter **M represents millions.**

- You have now **successfully set up an energy meter**. You must set up **additional energy meters** for **each type of energy** your building uses.

    - See [Section III](#) for guidance on how to set up meters for **offsite** renewable energy.
    - See [Section IV](#) for guidance on how to set up meters for **onsite** renewable energy.

- Next, you will need to **enter the energy usage for each energy meter**. You can do this manually by uploading a **bulk data upload spreadsheet**, or automatically by using **web services** from either your utility company or a third-party software. For more information on using a spreadsheet upload, review the [How to Get Utility Data Into Portfolio Manager](#) guide.

- Finally, check the boxes to **confirm that your energy meters account for your building's total energy usage** and click **"Apply Selections".** Most meters should already be included in your metrics, but if you have **sub-meters**, or meters that track only energy that you are excluding (such as billboards, cellphone towers or EV

charging stations), you can specify which meters should be included in your metrics. Learn more about tracking EV charging stations.

- You have now **successfully entered data for your energy meter**. Check that metrics such as ENERGY STAR score or energy use intensity values are calculated. If values aren't calculating, you may need to run the **data quality checker.** For more information on the data quality checker, see the section, What to Report in Portfolio Manager.

- By clicking on the **Summary Metrics tab**, you can see metrics for your building's ENERGY STAR Score, Source Energy Use Intensity (EUI), Site EUI, and GHG Emissions Estimate.

- **Note**: Some metrics may not be accurate or available until offsite and onsite renewables data is reported if applicable.
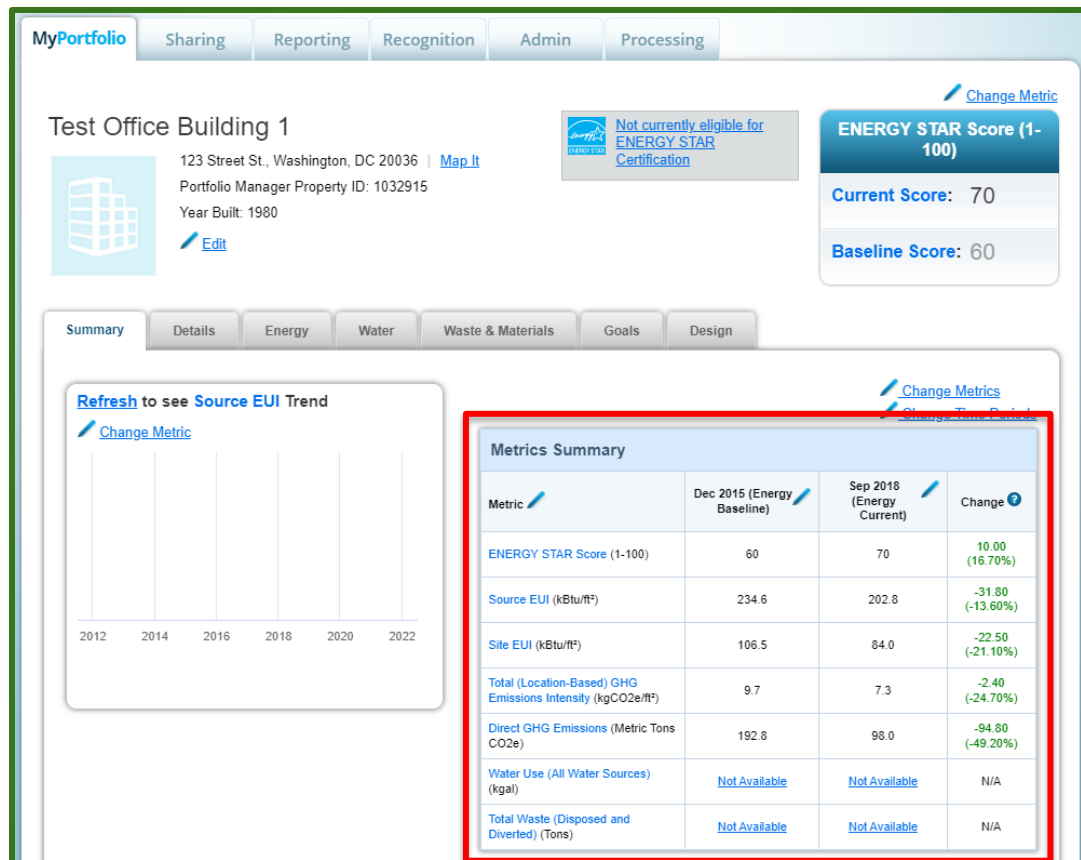
## III. Step-by-Step <u>Green Power Purchase</u> Reporting

- If you purchase green power **(i.e. offsite-renewables) to impact your avoided emissions**, you must **enter this information into your building's grid-purchased electricity meter** in Portfolio Manager.

- To enter your **offsite renewables**, visit [Portfolio Manager's guide](#).

- For more information, see Portfolio Manager's [Utility Entry Instructions](#) and [Green Power Reference](#) for more information on how to input green power.

IV. Step-by-Step <u>Onsite</u> Renewables Reporting

- If your building uses **onsite renewable power**, you must **enter this information as an energy meter** in Portfolio Manager.

- Navigate to the "Energy" tab. Then click "Add a Meter".
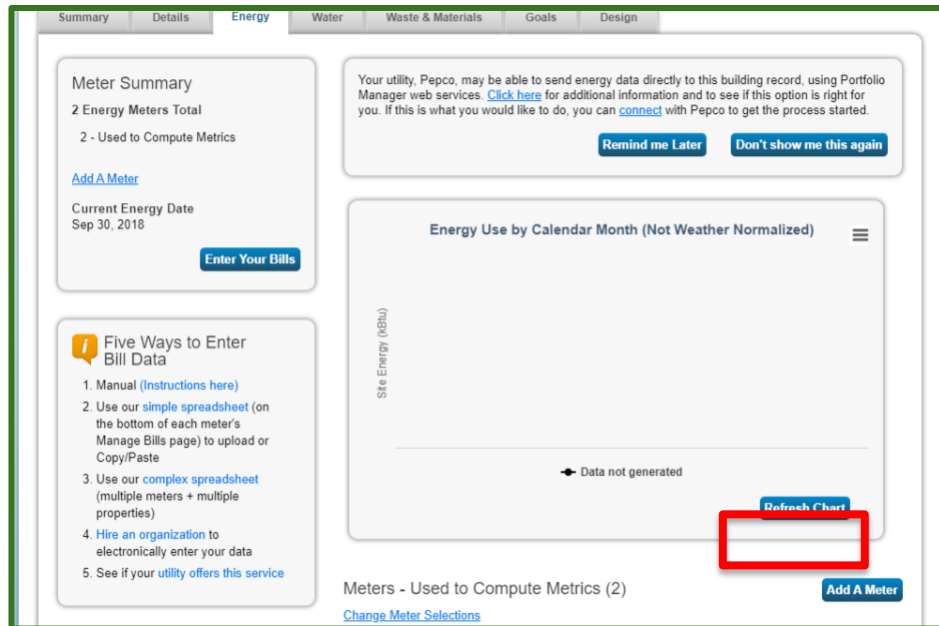
- Select **"Electric"** as the kind of energy you want to track. Then, **indicate if your renewables are generated from onsite solar panels, onsite wind turbines, or both.** Indicate the **number of meters** you would like to create for each source. Then, click "Get Started!"
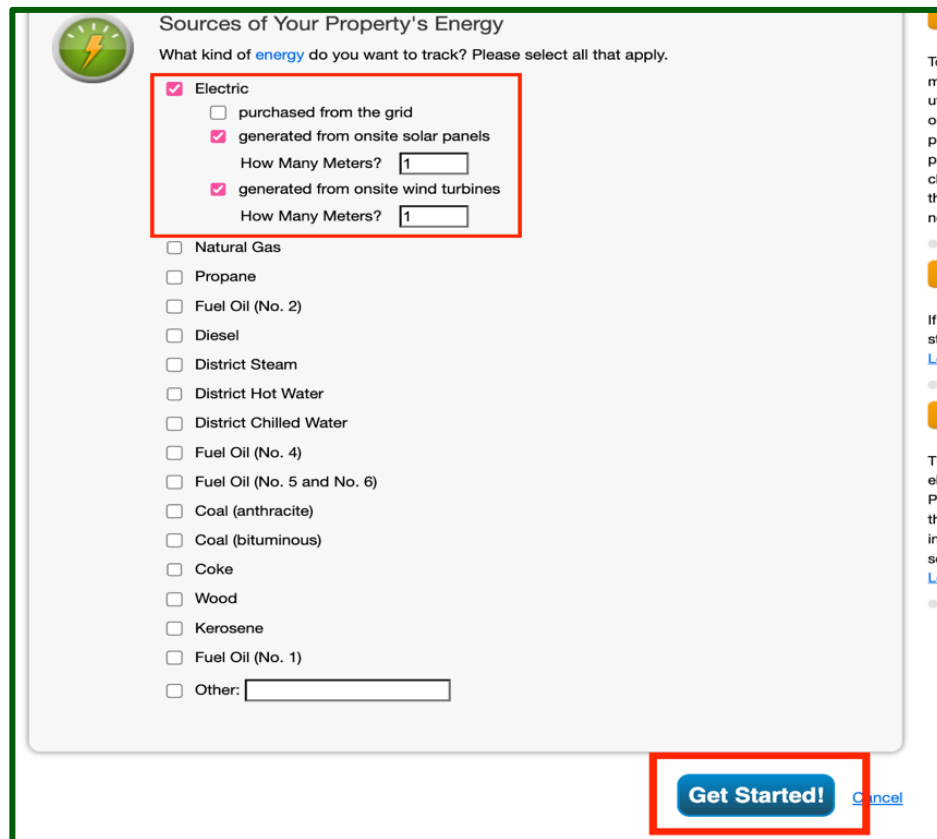
- Next, enter **information about your meters**, such as the date you started using it, and the units your utility bills report in. Click "Create Meters."

- **Note**: In Portfolio Manager, the letter **k (as in kWh or kBtu)** is used to represent **thousands** whereas some utility companies will use the letter **M for thousands**, especially for natural gas units. In Portfolio Manager, **M represents millions**.

- Next, you will need to **enter the energy data** for each energy meter.
- To enter data manually for a meter, click "Click to add an entry".

- Next, enter the **amount of renewable energy that was used on site**, and the amount of renewable energy that was **exported offsite** (if any). Indicate the start and end date for these amounts, as well as the estimated cost and any REC ownership. Then, click "Continue".

- You have now **successfully entered data for your energy meter**.

- For more information on how to set up and enter data for onsite renewable energy sources, see the following resources from ENERGY STAR:

  o [How to Create Meters for Onsite Green Power](#)

  o [How to Enter Data for Onsite Green Power](#)

  o [How to Enter Data for Onsite Green Power Using a Net-Metered Bill](#)

  o [How to Enter Data for Onsite Green Power Using a Net-Metered Bill Without the Required Data](#)

  o [How to Enter Data for Onsite Green Power with a Utility-Updated Meter](#)

V. Viewing GHG Emissions Data

- Once you have entered **twelve calendar months** of your building's complete energy usage (for all fuel types used in the entire building and for the same period), Portfolio Manager will **automatically calculate your building's estimated GHG emissions**. See Portfolio Manager's [GHG Technical Reference](#) for more information on how GHG emissions are calculated.

- Under the summary tab of your building's portfolio, your **[GHG emissions](#) estimate** will appear under the **"Metrics Summary" table.** You can [change the metrics](#) in your "Metrics Summary" table.

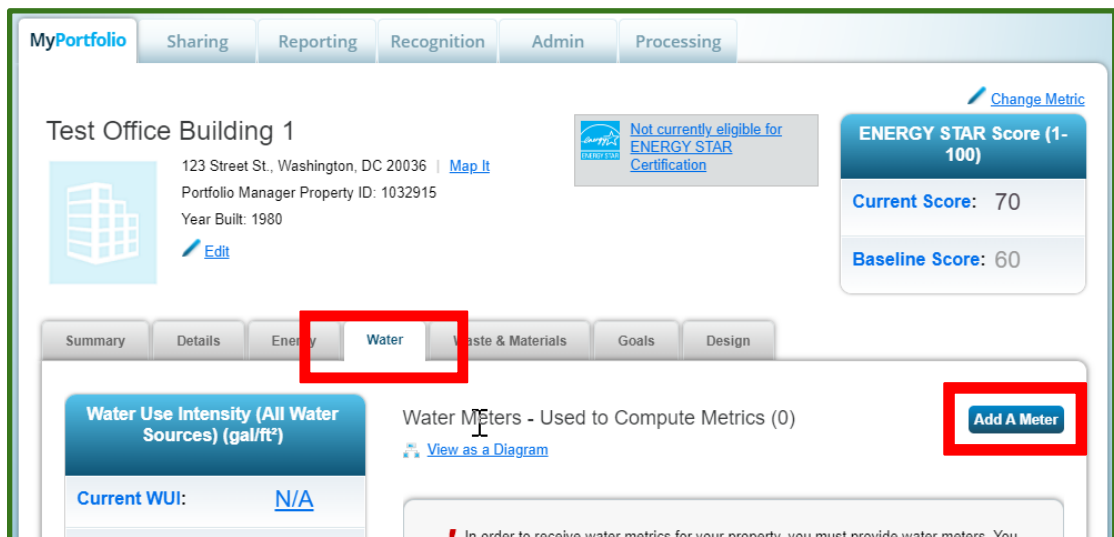- For more information about setting goals and targets, [review this guidance](#).
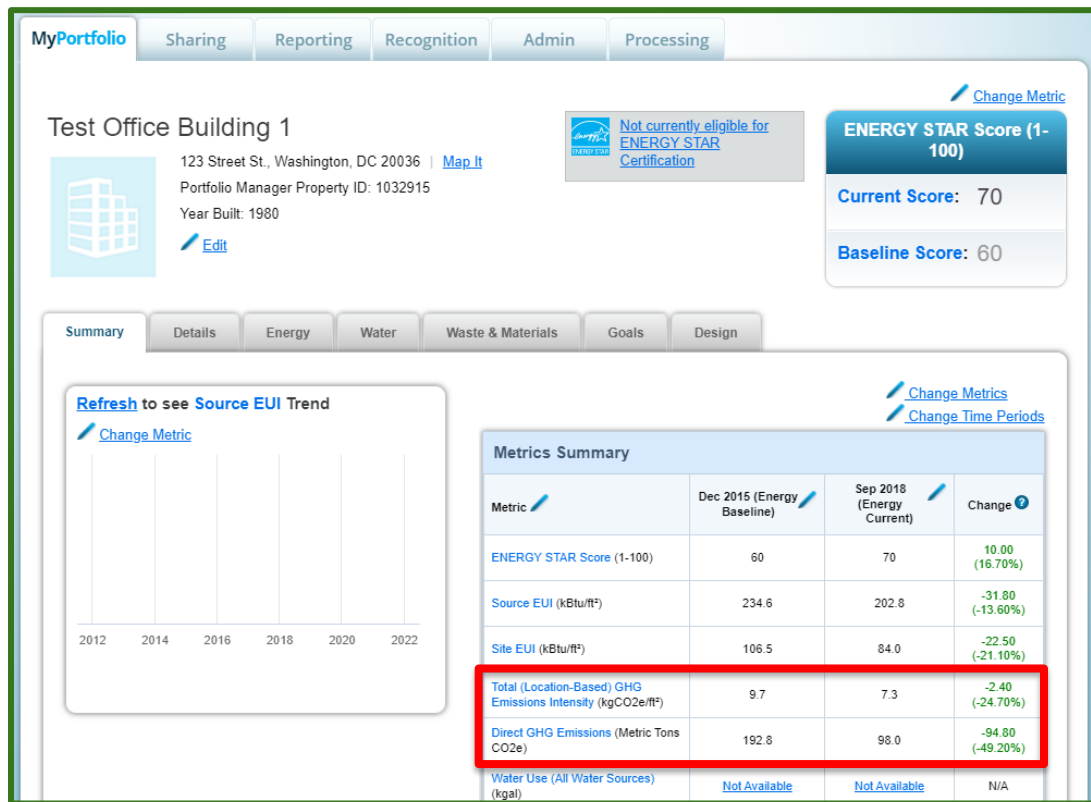
WATER USAGE REPORTING

I. Overview

- Portfolio Manager can be used to track the amount of water used by your property.

II. Step-by-Step Water Reporting

- Navigate to the **"Add a Meter"** option under the "Water" tab.
- A meter allows you to track the amount(s) of a specific water type used at the property.

- Portfolio Manager allows you to track usage of different types of water sources. GSA requires you to track all water sources used by the property. Select all water types you want to track, then click "Get Started!"

- Click the checkbox next to the water meter and **enter information about the source**, including the first date it was active and the unit of measure from your water bill. Then, click **"Create Meters"**

- You have now created your building's water meters. Now, you can create entries for your meter by clicking **"Click to add an entry".**

- Enter in the entry dates and the **amount of water used**. Then, click "Add Another Entry" if you wish to add more data. Or, click "Continue".

- Select which meters you want to include and what the meters measure. Then, click **"Apply Selections".** Most meters should be included in your metrics, but **if your building uses sub-meters**, you can specify which meters should be included in your metrics.

- You have now **successfully entered data for your water meter.**

EPA ENERGY STAR PORTFOLIO MANAGER RESOURCES

EPA offers **training** on a range of energy and water efficiency topics, including EPA Portfolio Manager guidance on improving building energy 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
- How do I enter information on offsite renewables?

Campus Guidance
- 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

Greenhouse Gas Emission Reporting
- ENERGY STAR's website on GHG emission tracking
- GHG Technical References
- How to Track GHG Emissions in Portfolio Manager
- National Median Total GHG Emissions
- 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)