HOW TO GUIDE

For Multifamily Buildings

Step-by-step instructions to use the U.S. EPA's Portfolio Manager to comply with the City of Philadelphia's Energy Benchmarking and Reporting requirements.

Contents

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What is Benchmarking?

Benchmarking tracks the total electricity, natural gas, steam, and/or water used in a building. The U.S. EPA's ENERGY STAR Portfolio Manager is the standard tool for benchmarking. This How to Guide shows how to benchmark a building to determine the building's:

- **Energy Use Intensity** (EUI), which indicates the building's energy use per square foot (kBtu/sq. ft.) per year. A lower score indicates a more efficient building.
- **ENERGY STAR** rating, which (for eligible buildings) compares your facility to similar buildings nationwide, adjusting for use, occupancy, weather, and other factors. These ratings are on a 1-100 scale, with a higher score indicates a more efficient building.
- **Overall water usage**.

See How Philadelphia's Largest Buildings Energy Use Stacks Up!

The City of Philadelphia has published benchmarking reports summarizing findings from energy and water usage data of non-residential buildings in past years. These reports are available at https://www.phila.gov/documents/energy-benchmarking-reports/.

Annual public disclosure of a subset of benchmarking energy and water data for all buildings 50,000 square feet or larger is required by the City's benchmarking law. Data from the past three years can be found on the Energy Benchmarking Visualization Tool, a web-based tool assist building owners and operators understand how their building stacks up to its peers around Philadelphia. The tool can be found at http://visualization.phillybuildingbenchmarking.com.
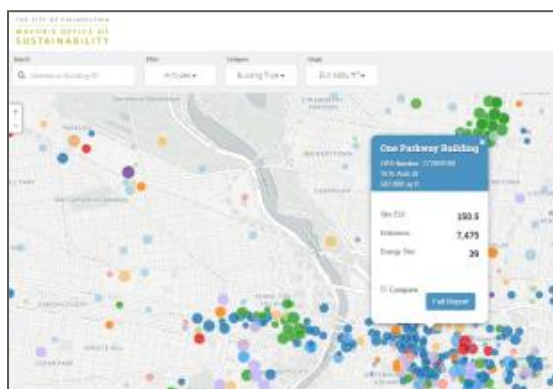
The guide below is for buildings that are new to compliance and do not have a Portfolio Manager account. If you currently benchmark your building using Portfolio Manager, visit http://www.phillybuildingbenchmarking.com/multifamily/ for details on bringing your account into compliance for reporting of 2022 data.

Step 1 Gather Building and Meter Information

✓ Confirm the accuracy of the information provided about the building on the notification letter sent by the City of Philadelphia. This includes:
1. Official Building Address
2. Square Footage
3. Office of Property Assessment (OPA) Number if on the letter

✓ Obtain the following details about the building's use:

Need help?

Visit the benchmarking website at www.phila.gov/benchmarking or for Portfolio Manager help visit EPA's support website https://energystar-mesa.force.com/PortfolioManager/s/contactsupport

If you still need assistance email

1. Determine the **primary Property Use** of the building (multifamily, dormitory or senior care) and secondary uses (retail, office, hotel or restaurant).
2. The **gross floor area** of the building, not including parking area.
3. Multifamily buildings eligible for ENERGY STAR scores will need to fill in **additional fields** to earn this score. These fields include:
   a. Number of Residential Living Units
   b. Number of Residential Living Units in a Low-rise (1-4 stories), Mid-rise (5-9 stories) or High-rise (10+ stories) setting
   c. Number of bedrooms

For more information, visit:
https://portfoliomanager.energystar.gov/pm/glossary#MultifamilyHousing

✓ Obtain your bills for your energy and water meters for the whole building from Jan 1 to Dec 31, 2022 (**including tenant/owner-occupied spaces and common spaces**).

Data release authorization forms can be found at: www.phillybuildingbenchmarking.com/utility-data-access

- **PECO** (Electric Meters)- PECO offers automatic transfer of aggregated electric usage data through its Smart Energy Usage Data Tool. Make sure to ask for electric usage for the entire facility. Visit:
https://www.peco.com/WaysToSave/ForYourBusiness/Pages/EnergyUsageDataTool.aspx
- **PGW** (Natural Gas Meters)- Customers should submit their data requests through completed data release authorization forms, and contact information (phone #) for the requestor via: PGWusage@pgworks.com; Fax: 215-684-6996 or Mail: Attn: Correspondence Department Philadelphia Gas Works
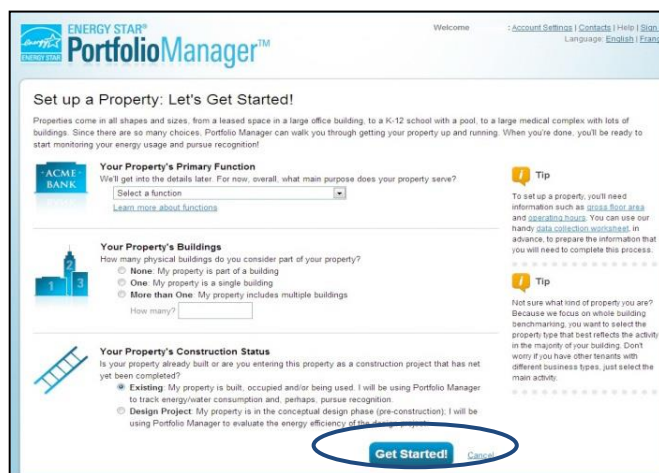
P.O. Box 3500 Philadelphia, PA 19122
- **Philadelphia Water** (Water Meters)- Submit complete data authorization form to WaterBenchmarking@Phila.gov *if you do not have access to 2022 water bills*.

Vicinity Energy (District Steam)- Vicinity offers automatic transfer of steam use information. Visit https://www.phillybuildingbenchmarking.com/wp-content/uploads/2022/01/Vicinity-Energy_Philadelphia-Benchmarking.pdf

Step 2 Setting up a Property in EPA Portfolio Manager

New Account
✓ Create a new account in Portfolio Manager at https://portfoliomanager.energystar.gov/pm/login.

1. Click **Create New Account.**
2. DO NOT use ANY special characters in your username (letters and numbers only).
3. **KEEP A RECORD** of the username and password — it is not possible to change usernames and very difficult to recover a lost password!

✓ Answer the basic questions about you and your organization:

1. For **Reporting Units**, choose "Conventional EPA Units (e.g., kBtu/ft²)."
2. **KEEP A RECORD** of the Security Questions and Answers.

✓ After creating an account, log in. You will be prompted to set up a property. Answer questions on Set up a Property page and click **Get Started.**

✓ On the next page enter Basic Property Information including the building name, address (use official address), primary property use, year built, occupancy, gross

floor area (do not include parking), and check off any boxes that apply to your property, then click **Continue.**

Entering Building Use Details

✓ On the next page, enter details about the primary building use, and additional property uses, based on the boxes checked on the prior page.

✓ The specific use details required will differ based on the property type selected.

1. Hover the computer mouse over each property use characteristic for definitions and enter values.

2. If you don't have all the information with you, use Default values. You can change these numbers later, but the defaults work well for "typical" buildings and are accepted by the City for benchmarking.

3. *Current As Of* date refers to the first day you'll be benchmarking the building. **This date must be on or before January 1, 2022.**

▼ **Building Use** ✎ Edit Name

Multifamily Housing refers to residential buildings that contain two or more residential living units. These properties may include high-rise buildings (10 or more stories), mid-rise buildings (5 to 9 stories), low-rise buildings (1 to 4 stories), townhomes broken into two or more units, or duplex homes. Occupants of these buildings may include tenants, cooperators, and/or individual owners.

Gross Floor Area should include all buildings that are part of a multifamily community or property, including any separate management offices or other buildings that may not contain living units. Gross Floor Area should include all fully-enclosed space within the exterior walls of the building(s) including living space in each unit (including occupied and unoccupied units), interior common areas (e.g. lobbies, offices, community rooms, common kitchens, fitness rooms, indoor pools), hallways, stairwells, elevator shafts, connecting corridors between buildings, storage areas, and mechanical space such as a boiler room. Open air stairwells, breezeways, and other similar areas that are not fully-enclosed should not be included in the Gross Floor Area.

The ENERGY STAR score for Multifamily Housing is available only to properties with 20 units or more. There is also a 75% occupancy requirement for certification. Townhome-only communities are not eligible (as long as townhomes are less than 50% of the total units the property is eligible).

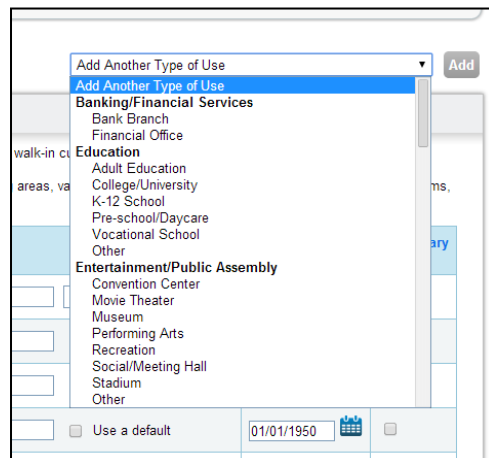| Property Use Detail	Value		Current As Of	Temporary Value
⭐ Gross Floor Area	*65,000	Sq. Ft. ▼	1/1/1950 📅	☐
⭐ Total Number of Residential Living Units	☐ Use a default		1/1/1950 📅	☐
⭐ Number of Residential Living Units in a Low-rise Setting (1-4 stories)	☐ Use a default		1/1/1950 📅	☐
⭐ Number of Residential Living Units in a Mid-rise Setting (5-9 stories)	☐ Use a default		1/1/1950 📅	☐
⭐ Number of Residential Living Units in a High-rise Setting (10 or more stories)	☐ Use a default		1/1/1950 📅	☐
⭐ Number of Bedrooms	☐ Use a default		1/1/1950 📅	☐
Resident Population Type	▼		1/1/1950 📅	☐
Government Subsidized Housing	▼		1/1/1950 📅	☐
Number of Laundry Hookups in All Units			1/1/1950 📅	☐
Number of Laundry Hookups in Common Area(s)			1/1/1950 📅	☐
Percent That Can Be Heated	▼		1/1/1950 📅	☐

Please note:
The fields requiring Number of Residential Living Units in a Low-, Mid- or High-rise setting, you should enter the total number of units based on many stories your building is. For example, if you have a single 12 story building with 120 units then you would enter 120 under Number of Residential Living Units in a High-rise setting and the other two fields you would enter 0. Entering these fields incorrectly can affect your ENERGY

STAR score (see https://energystar-mesa.force.com/PortfolioManager/s/article/Is-it-low-mid-or-high-rise-1600088539881).

✓ If your building has multiple uses, add more space uses to your property by going to the Details tab, after that you can select an option in the drop-down menu **Add Another Type of Use** at the top of the screen, and then click "Add". This will open up a different list of attributes for that particular space type.

For information on when to include another Property Use, please see https://energystar-mesa.force.com/PortfolioManager/s/article/When-should-I-create-separate-Property-Uses-1600088548691
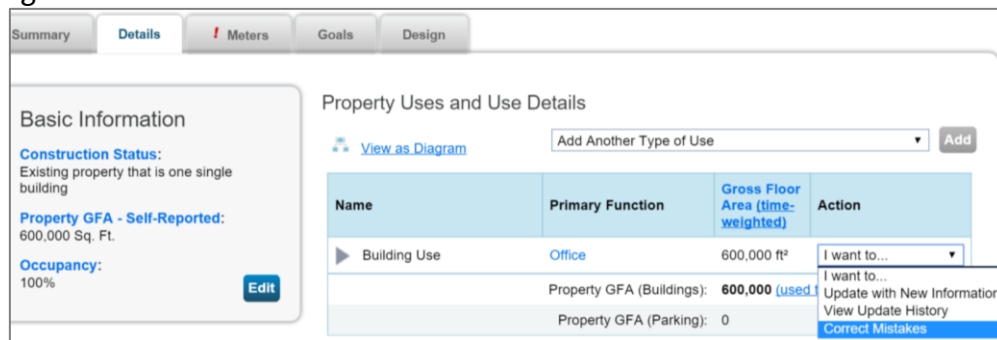
✓ When you have finished adding uses and details, click **Add Property** at the bottom of the page**.**

Need to Make Building Use Changes?

To edit building use details later, select **Correct Mistakes** from Action drop-down in the *Building Details* tab.

Step 3 Enter Energy and Water Usage Data

Adding Energy Meters

✓ In your Property Profile page, click on the Energy tab and select **Add A Meter**.
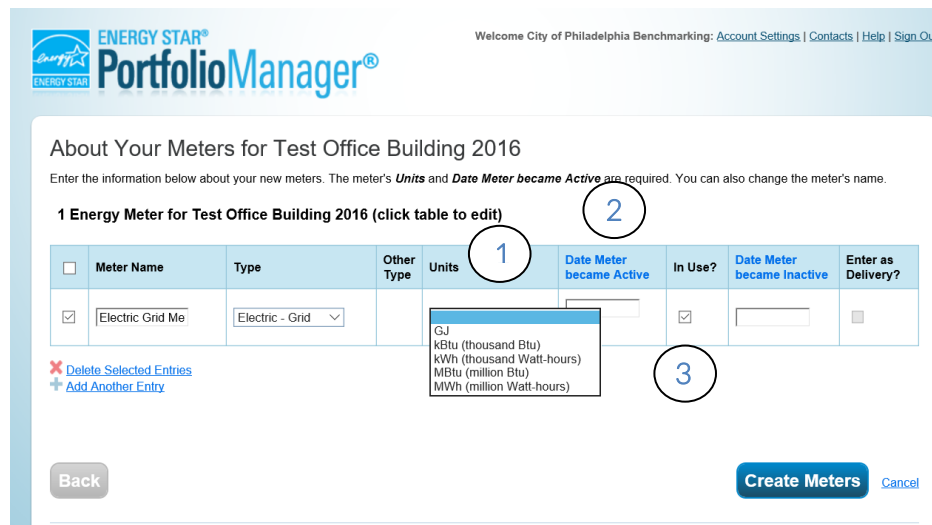
Need Access to your Utility Data?
Go to Page 4 & 5 of this Guide

✓ Select the types of fuel in your facility. For each type, enter the number of meters for that particular fuel type. Then click **Get Started**.

- **All of the property's Energy Meters are required including Electric, Natural Gas, Fuel Oil and Steam.**

✓ On the **Basic Meter Information** section, enter information for each meter:

1. Select **Units** for each meter based on your bill. See below for typical units found on your bills.
   a. *Electricity -PECO: kilowatt hours (kwh)*
   b. *Natural Gas-PGW: 100 cubic feet (ccf) or Therms*
   c. *Steam-Vicinity: 1000 pounds (K-Pound/Klbs):* ***Note, this same unit on your Vicinity bill may be known as an M-Pound, but an M-Pound in Portfolio Manager is the equivalent of 1,000,000 pounds of steam.***

2. Enter **Date Meter became Active**. ***Date must be on or before January 1, 2022.***

3. Make sure **In Use** box is checked.
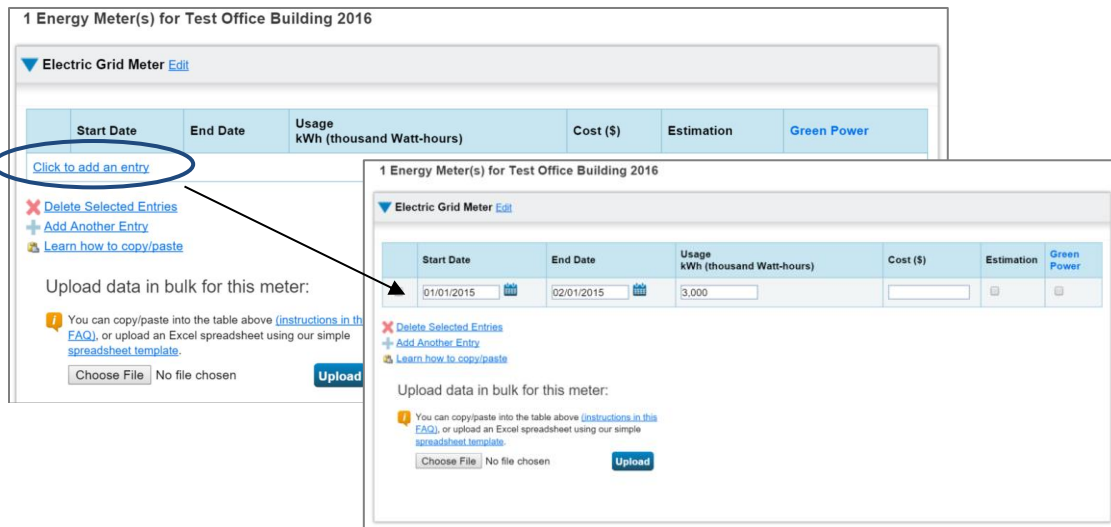
- ✓ Then click **Create Meters**.
- ✓ If your utility data is **aggregated,** meaning the monthly reading represents multiple meter readings from individual units or buildings, open the "Basic Meter Information" tab in your new energy data table and "Yes" where "Is this an Aggregate Meter?" is indicated. **Save your changes.**

- ✓ On the next screen, **Click to Add an Entry** in the table to begin entering the bill start and end date and usage for each month. *Cost is optional, and will not be shared with the City.*
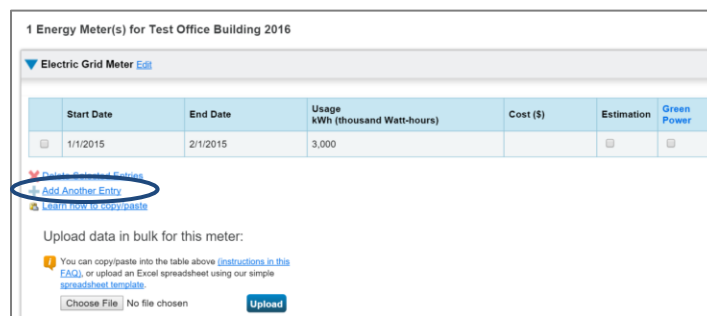
✓ To add another bill date, click **Add Another Entry** located underneath the table.

You can now copy and paste from Excel right into the meter table. To learn more:
https://energystar-mesa.force.com/PortfolioManager/s/article/How-do-I-Copy-and-Paste-Data-into-my-Meter-1600088526075

Be sure to enter data encompassing every day of 2022, from January 1 through December 31. Depending on your bill cycle, this may require you to enter usage for bills that begin in 2021 or end in 2023.

✓ Once you have entered 2022 data for your first meter, click on the **grey arrow** next to the meter below the data you have entered to add data for another meter:

If you would like to enter your bills later, you can skip the steps on the previous page and follow the steps below. Instructions on how to add data after your meters are created go to
https://energystar-mesa.force.com/PortfolioManager/s/article/How-do-I-add-energy-meter-data-bills-1600088544349
or
https://www.phillybuildingbenchmarking.com/wp-content/uploads/2023/01/2023-Update-Guide.pdf.

✓ Once you have finished entering data on this page for all energy meters, click **Continue**.

✓ On the next page, click the **check boxes** next to each of your meters, then select the **"These meter(s) account for the total energy consumption for this property"** button and click **Apply Selections**.

✓ You will be taken back to the Property Profile page where you can begin to analyze your results.

Adding Water Meters

✓ In your Property Profile page, click on the Water tab and select **Add A Meter**.

Need Access to your Utility Data?
Go to Page 4 & 5 of this Guide

✓ Select "Municipally Supplied Potable Water" then the appropriate type of meter and number of meters for your facility. For each type, enter the number of meters for that particular utility. Then click **Get Started**.

✓ Repeat steps for filling out the "About your meters," "Adding meter entries" and "Select Meters to Include in Metrics" for water as you did for Energy Meters.

✓ Indicate if the meter is **aggregated** by opening the "**Basic Meter Information**" tab and clicking "**Yes**" where "**Is this an Aggregate Meter?**" is available.

Water usage, if applicable, is required by law. The units for water are measured in "ccf (hundred cubic feet)".

Step 4 Add Philadelphia Building ID Number

✓ Your **Philadelphia Building ID number (also known as the OPA number)** should have been mailed to you as part of your initial compliance notice. **If you do not have the Philadelphia Building ID #**, you can search for it on https://atlas.phila.gov/

Your Philadelphia Building ID number is REQUIRED to be in your benchmarking report.

✓ Click on a property and enter the Details tab. There, you will see a box that says *Unique Identifiers (IDs).* Click **Edit.**

✓ On the next page, scroll to the bottom to the box that says **"Standard IDs."** In the drop-down box on the left, find **Philadelphia Building ID.** Select this, and enter your OPA number in the box to the right. Then click Save.

Tip Multiple OPA numbers? You can add them all on this screen! Just separate each unique OPA number with a semicolon.

Step 5 Check for Data Errors and Confirm Energy Use Intensity (EUI)/ENERGY STAR Score

✓ You will now be able to run the Data Quality Checker for your property. On the **My Portfolio/ Summary** page of your property, click on **Check for Possible Errors**.

✓ In the box titled "Select Timeframe & Run Check", select **Dec 31 and 2022** for **Year Ending** and then click **Run Checker**.

✓ On the next screen Portfolio Manager will indicate whether or not you have errors and where the possible errors might be*. Please follow instructions on the screen in order to resolve these issues then re-run the checker by following steps above to see if the errors are resolved.* If you are still receiving an error, please visit: http://www.phillybuildingbenchmarking.com/support or contact benchmarkinghelp@phila.gov for assistance.

IGNORE the waste meter alert. Waste is not required.

✓ If you receive no errors or have resolved your errors, to **Confirm** that you have entered all information correctly by viewing the box in the top-right corner of the **Summary** tab of your building's profile. Completed building profiles will include a number in either the Source EUI or ENERGY STAR Score fields:

Weather-Normalized Source EUI (kBtu/ft²)	
Current EUI:	342.1
Baseline EUI:	329.0

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

If you do not see a number for either Source EUI or ENERGY STAR, you are able click on N/A to see where the errors are and how to solve them. If you still cannot resolve the error, please contact the Office of Sustainability at benchmarkinghelp@phila.gov for assistance.

Step 6 Report Your Data to the City of Philadelphia
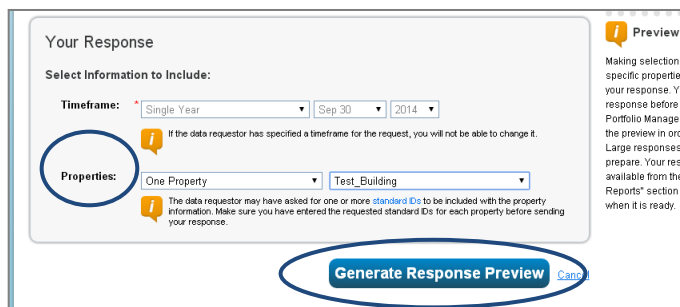
Accessing the Philadelphia Custom Reporting Template 2022

✓ Go to www.phillybuildingbenchmarking.com and click on **Report Data** located at the top menu bar.

ABOUT   GET STARTED   EXEMPTION REQUEST   SUPPORT & FORMS   ENERGY EFFICIENCY   CONTACT   REPORT DATA

NEXT BENCHMARKING DEADLINE IS *JUNE 30, 2023*

Welcome to the City of Philadelphia **BUILDING ENERGY BENCHMARKING**

REPORTING WINDOW FOR 2022 DATA NOT YET LIVE

Preparing a Response

✓ You will be taken to the Respond to Data Request page. You may have to login to Portfolio Manager.

✓ Scroll down to the bottom of the screen and select your **property(s)** in the drop-down boxes next to Properties and click on **Generate Response Preview**.

Submitting a Response

✓ You will be taken to Reporting tab. Scroll down and select **"Data Requests from Others"**
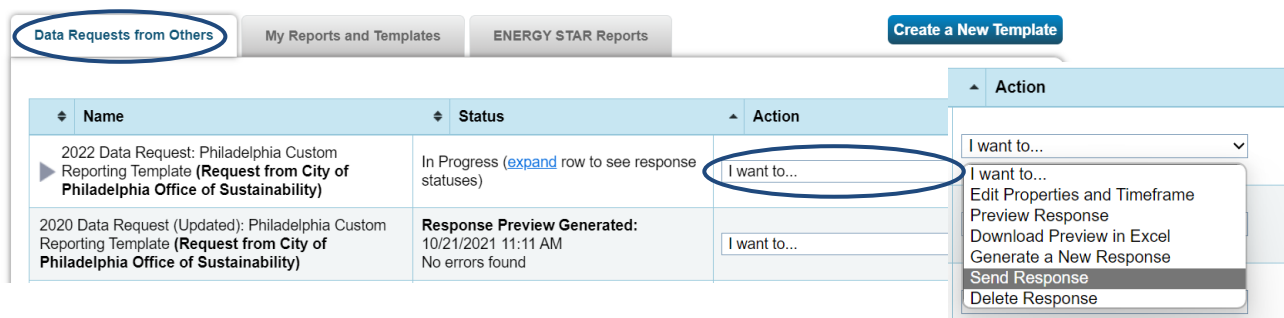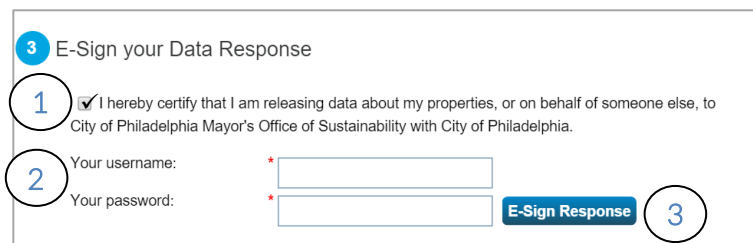
Data Quality Error: If the data or account has any issues an alert message will pop-up above the table. Please click "read more" to fix the issue before sending or contact benchmarkinghelp@phila.gov if you are not able to resolve the issue and then repeat steps above.

✓ If there are no data quality alerts, scroll down and select Data Requests from Others. Find the item that says **"Philadelphia Custom Reporting Template for 2022"**. Select **Send Response** from the Action drop-down list next to the report name.

✓ One next screen, scroll down to **#3 E-Sign Your Data Response:**

1. **Check the box** "I hereby certify…"
2. Enter your **Login Information**
3. Click **E-Sign Response**

✓ The screen will refresh then scroll down to the bottom (you will see a green text that says "**Signed**"), then click **Send Data.** You will receive a confirmation email informing you that your data has been submitted to the City of Philadelphia.

3 E-Sign your Data Response

☑ I hereby certify that I am releasing data about my properties, or on behalf of someone else, to City of Philadelphia Mayor's Office of Sustainability with City of Philadelphia.

Your username: * city of Philadelphia benchmark

Your password: * ✔ **Signed**

Send Data Cancel

Understanding Your Results and Energy Efficiency:

For more information, how to interpret your results and what it means please visit:
http://www.phillybuildingbenchmarking.com/wp-content/uploads/2015/09/Understand_and_Invest_3.21.14.pdf.

If you are looking to reduce energy consumption in your residential building visit
http://www.phillybuildingbenchmarking.com/incentives/ to find more information about energy efficiency rebate and incentive programs provided by the local utility companies.