

## 50001 Ready Energy Performance Reporting with Portfolio Manager

After completing the 25 tasks in the 50001 Ready Navigator, projects seeking recognition must complete and upload to the online Navigator tool a signed [Self-attestation Form](#) and a completed [Energy Performance Improvement Report](#) (EPIR).<sup>1</sup> This EPIR serves to demonstrate a site-wide understanding of your site's energy consumption and energy performance improvement. Energy Star's Portfolio Manager can be used to collect energy data for entry into the EPIR. The guidance included in this document is for project's seeking 50001 Ready recognition that are electing to use Energy Star's Portfolio Manager as a means of demonstrating energy performance.

### **Getting it done:**

1. Verify the Portfolio Manager property information and metrics align to your 50001 Ready project's scope and metrics.
2. Generate a 50001 Ready Portfolio Manager data collection report using one of the two applicable reporting templates:
  - a. [First Time Annual Recognition - 50001 Ready Reporting Template](#)
  - b. [Subsequent Annual Recognitions - 50001 Ready Reporting Template](#)
3. Enter data from the 50001 Ready Portfolio Manager Reporting Template to the 50001 Ready Energy Performance Improvement Report (EPIR) after converting metrics from KBtu to MMBtu.

### **Full description:**

#### Step 1: Verify Portfolio Manager Property Data:

Prior to generating a 50001 Ready data collection report, you will want to verify that the property information and metrics to be downloaded from Portfolio Manager are accurate and that they align with your intended 50001 Ready EnMS scope, boundaries and metrics. When your Portfolio Manager property was originally set up, its basic information and meter data was entered in order to benchmark the property in the Energy Star system. The 50001 Ready Portfolio Manager Reporting Template extracts a pre-selected data set from your selected Portfolio Manager property (or set of properties) to facilitate the demonstration of energy performance for entry on the 50001 Ready EPIR.

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<sup>1</sup> <https://navigator.lbl.gov/guidance/recognition>

To confirm the Portfolio Manager property details first log into your Portfolio Manager account, then from the **MyPortfolio** tab of your Portfolio Manager landing page [Figure 1], select each property associated with the 50001 Ready project submission from the list of properties under the **Dashboard** section. Once a property is selected its details will open in a new page and be displayed across multiple tabs beginning with the **Summary** tab. [Figure 2].

It is generally recommended that all Portfolio Manager property details be confirmed for accuracy, but for the specific purposes of demonstrating energy performance for project's seeking 50001 Ready recognition, the following details should be verified:

1. Property Name and Address

From the **Summary** tab at the top left corner, verify your Portfolio Manager property is consistent with what you are including in your 50001 Ready energy management system (EnMS). Check that the property name, address, and number of buildings are accurate.

2. Total Gross Floor Area (GFA)

From the **Details** tab [Figure 3] under the dashboard, confirm that the total GFA reported in Portfolio Manager aligns with your 50001 Ready submission.

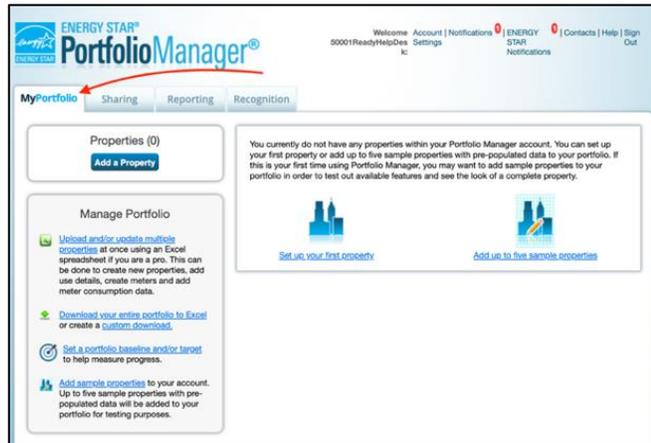


Figure 1: Energy Star Portfolio Manager MyPortfolio page

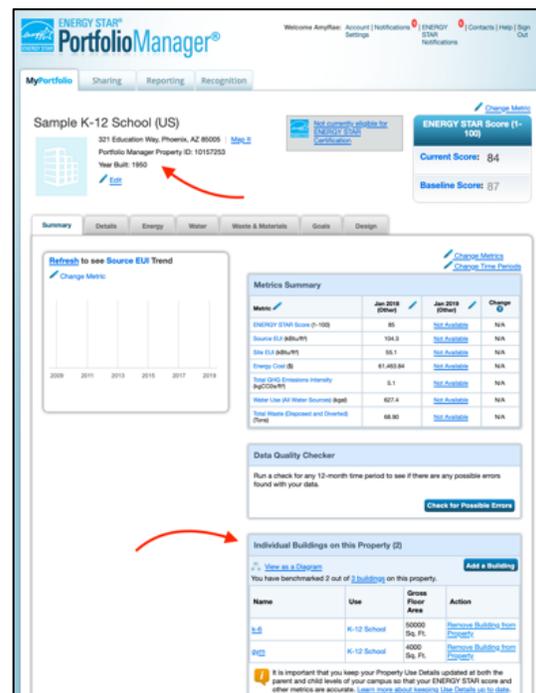


Figure 2: Verify the property name, address, and number of buildings

3. Property Type:

On the **Details** tab under the **Property Type** section [Figure 3], check to confirm that the property type is correct according to the Energy Star designations.<sup>2</sup>

4. Number of Buildings:

From the **Energy** tab [Figure 4] under the **Your Property** section, confirm the portion of and/or number of the buildings tracked at this property are accurate and that they align with your 50001 Ready submission. For information on how Portfolio Manager defines a property and how to report multiple building campuses in a single property, refer to the Energy Star guidance on tracking buildings on your property<sup>3</sup>, on a campus<sup>4</sup>, and defining property relationships<sup>5</sup>.

Note: The definition of a single **“property”** in Portfolio Manager is detailed in the Energy Star glossary referenced above. A 50001 Ready EnMS scope and boundary is not necessarily limited to this same definition. **Single, multiple, and partial Portfolio Manager properties may be included within a single 50001 Ready EnMS depending on the configuration that has been defined in task 3 activities of the 50001 Ready Navigator.**

5. Meters:

The **Energy** tab also displays the connected meters to this property in its main section. Check to ensure all meters are linked, current and align with your 50001 Ready project submission.

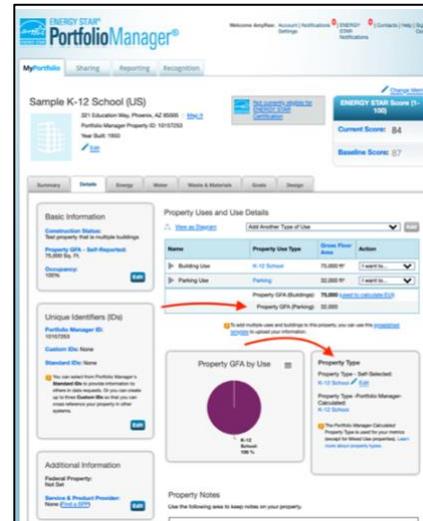


Figure 3: Property type and GFA are located on the "Details" tab of dashboard

Step 2: Generate a 50001 Ready Data Collection Report with Energy Star’s Portfolio Manager

Generate a 50001 Ready data collection report with Portfolio Manager from one of the two templates linked below. The type of 50001 Ready annual recognition that your project is seeking, either first time or subsequent year annual recognitions, will determine which template to use:

- a. [First Time Annual Recognition - 50001 Ready Reporting Template](#)
- b. [Subsequent Annual Recognitions - 50001 Ready Reporting Template](#)

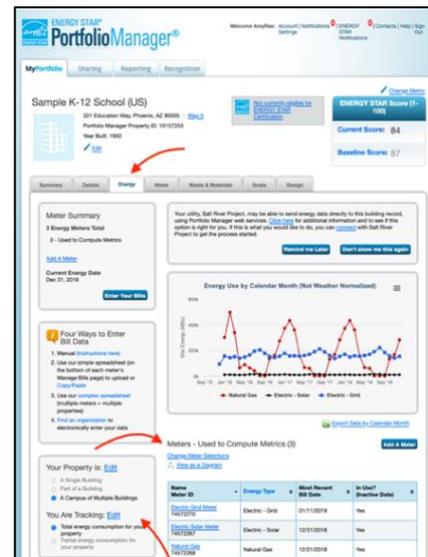


Figure 4: Property and meters details on the "Energy" tab of the dashboard

<sup>2</sup> <https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager/identify-your-property-type>

<sup>3</sup> <https://portfoliomanager.energystar.gov/pm/glossary#YourPropertysBuildings>

<sup>4</sup> <https://portfoliomanager.energystar.gov/pm/glossary#Campus>

<sup>5</sup> <https://portfoliomanager.energystar.gov/pm/glossary#Property%20Relationships>

The selected link will route to the Portfolio Manager login screen, where you will be prompted to sign into your Portfolio Manager account. Once signed in, the “Respond to Data Request” page will open [Figure 5]. At the top of this page, the information about this data request will be displayed. Just below that are detailed instructions for generating your 50001 Ready Energy Data Request.

Definitions of terms used in 50001 Ready Energy Performance Improvement Report and how it relates to Portfolio Manager

The full list of Portfolio Manager custom reporting metrics can be downloaded from the Energy Star site.<sup>6</sup> The following terms used on the 50001 Ready recognition webpage and their relationship to Portfolio Manager are detailed below:

Current Reporting Period:

**For first time annual recognition requests:** The Current Reporting Period is a consecutive 12-month time span that can be established with a starting date up to 25 months prior to the 50001 Ready recognition request date. This allowance is provided to accommodate sites that report energy consumption data to other programs. Sites are encouraged to establish the Current Reporting Period so that it ends as close to the 50001 Ready recognition request date as possible.

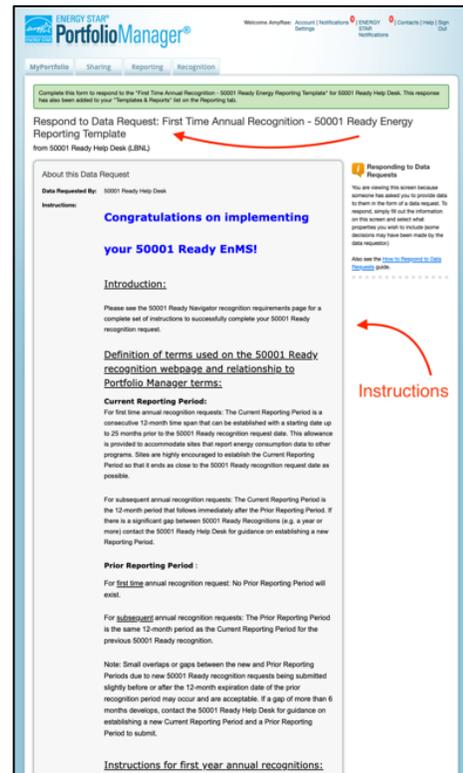


Figure 5: Portfolio Manager Reporting Template Instructions page

<sup>6</sup> <https://www.energystar.gov/buildings/tools-and-resources/full-list-portfolio-manager-custom-reporting-metrics>

For subsequent annual recognition requests: The Current Reporting Period is the 12-month period that follows immediately after the Prior Reporting Period. If there is a gap greater than 6 months between 50001 Ready Recognitions, contact the 50001 Ready Help Desk for guidance on establishing a new Reporting Period.

Prior Reporting Period:

For first time annual recognition requests: No Prior Reporting Period will exist.

For subsequent annual recognition requests: The Prior Reporting Period is the same 12-month period as the Current Reporting Period for the previous 50001 Ready recognition.

Reporting template instructions in Portfolio Manager for first-year annual recognitions:

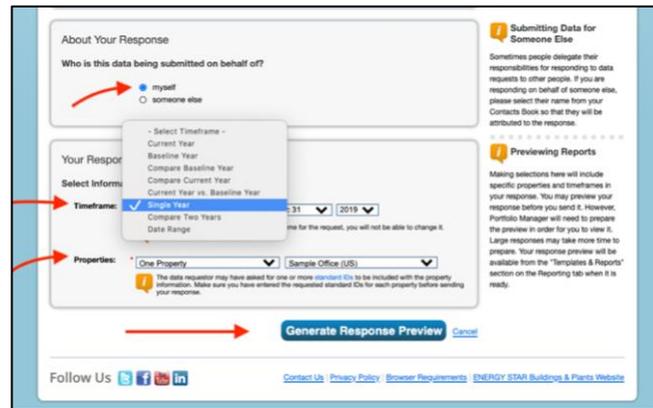


Figure 6: Portfolio Manager Reporting Template's "About Your Response" and "Your Response" sections

Generate a report demonstrating 12 months of data:

1. In the **"About Your Response"** section, select the appropriate designation:
  - a. If you are responding on behalf of yourself, then select the "myself" option.
  - b. If you have been delegated to respond to this request on behalf of someone else, then select their name from your Portfolio Manager "Contacts Book" so that they will be attributed to the response.
2. In the **"Your Response"** section [Figure 6], select the timeframe and properties associated with your initial year 50001 Ready submission:
  - a. Select the "Single Year" option from the "Timeframe" drop-down menu
  - b. Next, enter the final month and year of the 12-month date range (the Current Reporting Period) that you are declaring as your 50001 Ready energy performance data.
3. Select the Portfolio Manager property (or properties) that make up your 50001 Ready EnMS scope and boundary.

*Note: If a single Portfolio Manager property makes up your 50001 Ready EnMS, then select the "One Property" option from the "Properties" drop-down menu and then make the appropriate property selection from your property list. If your EnMS scope and boundaries includes multiple properties, then select the "Multiple Properties" option along with those associated properties from the drop-down menu to be included in your report.*

4. Once your property is selected, click the “Generate Response Preview” button.
  - a. The system will generate the report and you will be automatically routed to your Portfolio Manager account “Reporting” screen [Figure 7] where a list of your most recent reports generated will be displayed.
  - b. Locate the report titled “Data Request: First Time Annual Recognition Reporting Template” and from the report’s “I want to” drop-down menu option located in the “Action” column, select “Download Preview in Excel” to download and save the report to your computer.
- C. When submitting for 50001 Ready Recognition in the Navigator tool, you will be prompted to fill out and upload an Energy Performance Improvement Report. Use the output of the downloaded Portfolio Manager report to populate section 2 of the Energy Performance Improvement Report.

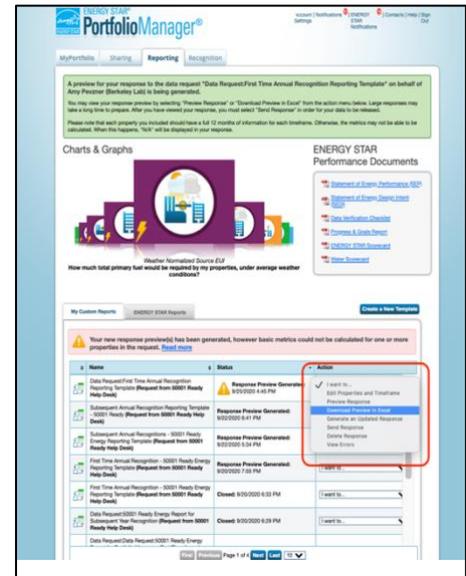


Figure 7: Portfolio Manager account "Reporting Screen"

Reporting template instructions in Portfolio Manager for subsequent annual recognition requests:

Generate a report demonstrating energy performance improvement (comparing two 12-month ranges of data):

1. In the “About Your Response” section [Figure 8], select the appropriate designation:
  - a. If you are responding on behalf of yourself, then select the “myself” option.
  - b. If you have been delegated to respond to this request on behalf of someone else then, select their name from your Contacts Book so that they will be attributed to the response.



Figure 8: Portfolio Manager "Reporting" screen

Energy Performance Improvement Reporting

2. In the “Your Response” section [Figure 8], select the timeframe and properties for comparing your initial year 50001 Ready recognition to your subsequent year 50001 Ready submission:
  - a. First, select the “Date Range” option from the “Timeframe” drop-down menu. Then, select the “Yearly” reporting interval option from the drop-down menu and enter in the appropriate two time-frames to compare your energy performance metrics.
  - i. For the first data set (the Prior Reporting Period), enter in the last month and year of your initial year of 50001 Ready implementation.
  - ii. For the second data set (the Current Reporting Period), enter in the last month and year of your subsequent year of 50001 Ready implementation.
3. Select the Portfolio Manager property or properties associated with your 50001 Ready EnMS scope and boundary.

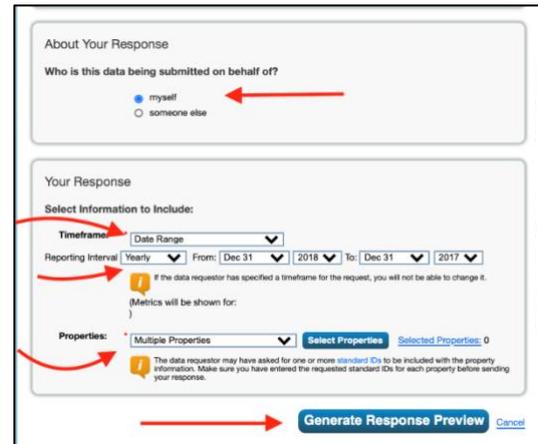


Figure 9: Portfolio Manager “About Your Response” and “Your Response” sections

*Note: If a single Portfolio Manager property makes up your 50001 Ready EnMS then you would select the “One Property” option from the “Properties” drop-down menu and then make the appropriate property selection from your property list. If your EnMS scope and boundaries includes multiple properties, then you would select the “Multiple Properties” option along with those associated properties from the drop-down menu to be included in your report.*

4. Once you have selected your property, select the “Generate Response Preview” button.
  - a. The system will generate the report and you will be automatically routed to your Portfolio Manager account “Reporting” screen [Figure 9] where a list of your reports generated with the most recent will be displayed.
  - b. Locate the report titled “Subsequent Annual Recognition(s) - 50001 Ready Reporting Template (Request from 50001 Ready Help Desk)” and from the report’s “I want to” drop-down menu option located in the “Action” column, select “Download Preview in Excel” to download and save the report to your computer.
  - c. When submitting for 50001 Ready Recognition in the Navigator tool, you will be prompted to fill out and upload an Energy Performance Improvement Report. Use the outputs collected from the downloaded Portfolio Manager report to populate sections 2 and 3 of the Energy Performance Improvement Report.

### Step 3: Enter Portfolio Manager Data into a 50001 Ready Energy Performance Improvement Report

The 50001 Ready Energy Reporting Template generated in Energy Star’s Portfolio Manager will provide the data needed to fill out the 50001 Ready Energy Performance Improvement Report (EPIR) [Figure 10].

*Note: Portfolio Manager reports metrics in kBtus or therms, but the 50001 Ready EPIR requires data be reported in MMBtus. Refer to the Energy Conversions tab of the EPIR to convert your project’s metrics into MMBtus prior to entering them into the Report tab of the EPIR [Figure 11].*

For step by step mapping and instructions for entering data into the EPIR using the data generated from your 50001 Ready Portfolio Manager reporting template, refer to the 50001 [Ready Energy Performance Reporting with Portfolio Manager](#) document.

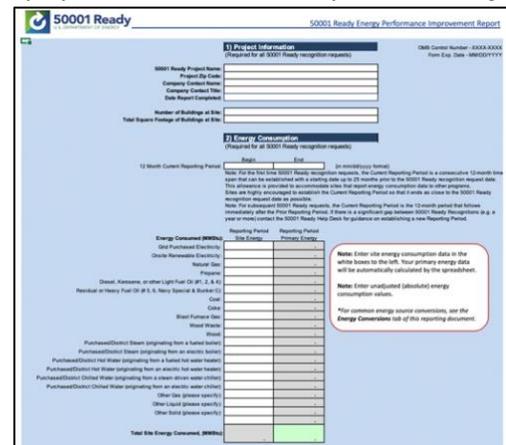


Figure 10: 50001 Ready EPIR, Report tab sections 1 and 2

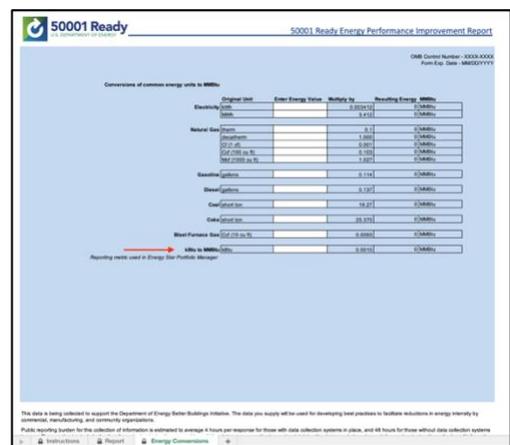


Figure 11: 50001 Ready EPIR Energy Conversion Tab

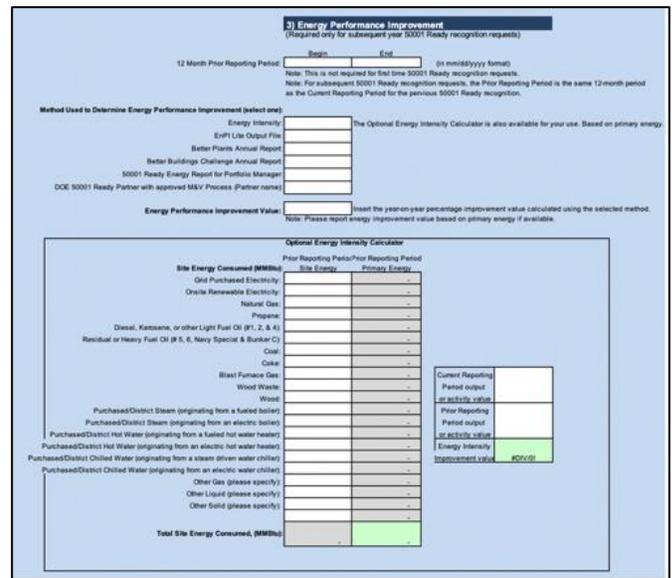
If you have elected to use the EPIR’s Energy Performance Improvement Calculator to calculate energy intensity-based energy performance improvement follow the guidance below:

The required Energy Performance Improvement Report includes a feature to calculate energy intensity-based energy performance improvement [Figure 12]. To use the calculator, enter the 12-month Current Reporting Period “output or activity level values”, then enter the 12-month Prior Reporting Period “output or activity level values” into cells I87 and I90 respectively. Note that you only need to provide the numeric values for the unit of output or activity, not the unit itself (i.e., if you are calculating energy intensity based upon volume of production, floor area, or occupancy, you only need the quantitative value associated with these metrics and not list the metrics themselves). For example, if you measure energy intensity based on the total building area within your scope, and your total area is 800,000 ft<sup>2</sup>, then simply enter “800,000” as the output or activity value.

Once you have completed the EPIR, upload through the Navigator online tool along with your Attestation Form.

For additional guidance on filling out the EPIR, refer to the accompanying [50001 Ready Energy Performance Reporting with Portfolio Manager](#) document and the [50001 Ready Navigator Recognition Requirements page](#).

**For questions, contact the 50001 Ready Help Desk at: [50001ready@lbl.gov](mailto:50001ready@lbl.gov).**



**3) Energy Performance Improvement**  
(Required only for subsequent year 50001 Ready recognition requests)

12 Month Prior Reporting Period: Begin [ ] End [ ] (in mm/dd/yyyy format)  
Note: This is not required for first time 50001 Ready recognition requests.  
Note: For subsequent 50001 Ready recognition requests, the Prior Reporting Period is the same 12-month period as the Current Reporting Period for the previous 50001 Ready recognition.

Method Used to Determine Energy Performance Improvement (select one):  
 Energy Intensity  
 E-PIR Life Output File  
 Better Plants Annual Report  
 Better Buildings Challenge Annual Report  
 50001 Ready Energy Report for Portfolio Manager  
 DOE 50001 Ready Partner with approved MSV Process (Partner name: [ ])  
 The Optional Energy Intensity Calculator is also available for your use. Based on primary energy.

Energy Performance Improvement Value: [ ]  
Note: Please report energy improvement value based on primary energy if available.

**Optional Energy Intensity Calculator**

Site Energy Consumed (MMBtu)	Prior Reporting Period/Prior Reporting Period		Current Reporting Period output or activity value
	Site Energy	Primary Energy	
Grid Purchased Electricity			
Onsite Renewable Electricity			
Natural Gas			
Propane			
Diesel, Kerosene, or other Light Fuel Oil (# 2, 4 & 6)			
Residual or Heavy Fuel Oil (# 5, 6, Navy Special & Bunker C)			
Coal			
Coke			
Steel Furnace Gas			
Wood Waste			
Wood			
Purchased/District Steam (originating from a fueled boiler)			
Purchased/District Steam (originating from an electric boiler)			
Purchased/District Hot Water (originating from a fueled hot water heater)			
Purchased/District Hot Water (originating from an electric hot water heater)			
Purchased/District Chilled Water (originating from a steam driven water chiller)			
Purchased/District Chilled Water (originating from an electric water chiller)			
Other Gas (please specify)			
Other Liquid (please specify)			
Other Solid (please specify)			
<b>Total Site Energy Consumed (MMBtu)</b>			

Energy Intensity Improvement Value: [ ] %

Figure 12: 50001 Ready EPIR: Section 3 with optional Energy Intensity Calculator