

How to Share Green MIP Compliance Data from Multifamily Properties in Portfolio Manager®

This guidance explains how Multifamily owners can share Green MIP compliance data with HUD using the Environmental Protection Agency (EPA)'s ENERGY STAR® Portfolio Manager®. If your property does not already have a Portfolio Manager account, learn how to create one in the full instructions [here](#). If a Statement of Energy Performance was previously generated for the property, then it is possible the account already exists, and you must [gain access](#) to it.

It's as easy as 1-2-3!

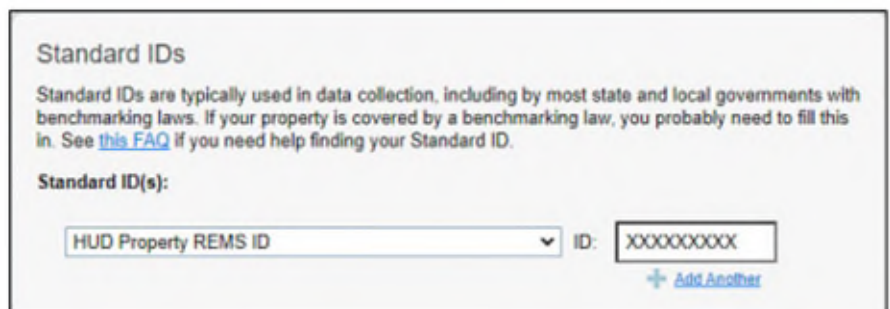
1. Confirm the correct HUD Property ID(s).
2. Connect with HUD ("HUDMultifamilyBenchmarking").
3. Share Data with your Service Provider (HUD) for Exchanging Data.

! Please note that each property's **HUD Property REMS ID number should be a nine-digit numeric-only number that begins with an 8**. If this ID is entered incorrectly, the property's data will not be uploaded to HUD's systems and the property will fail to be in compliance.

Confirm

Go to **Basic Property Information** and find the **Standard IDs** section.

Confirm the HUD Property REMS ID is listed, and the number provided is correct for each property you need to share with HUD. If you do not know your REMS ID, please contact your Account Executive at HUD.



Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

Standard ID(s):

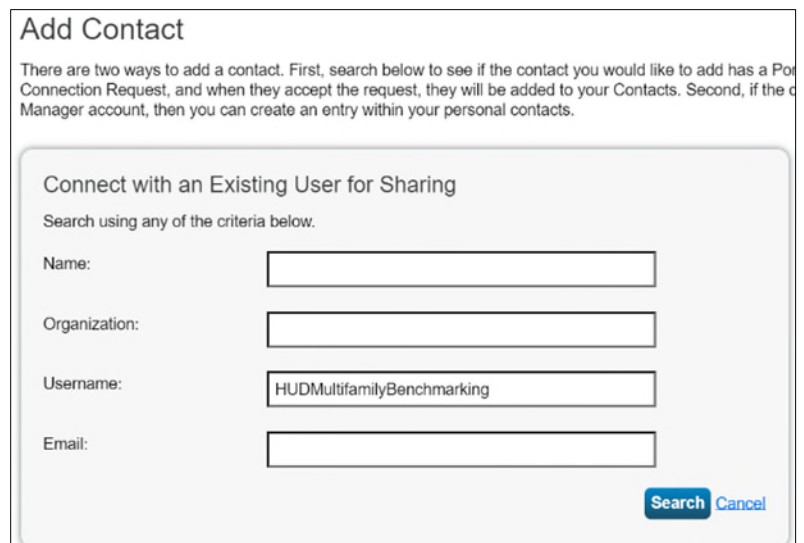
HUD Property REMS ID ID: XXXXXXXXXX [Add Another](#)

If it is missing, then select **HUD Property REMS ID** using the dropdown menu and enter your property's REMS ID in the box provided. If it is incorrect, enter the correct REMS ID.

Connect

To send a connection request go to the **Contacts** page:

1. Click **Contacts** in the upper right-hand corner of the screen. The directory shows the current list of contacts, including those you are currently "connected" with.
2. Click **Add New Contacts/Connections**.
3. Type **HUDMultifamilyBenchmarking** (no spaces) in Username area and click **Search** button.
4. Once the username is found (see image below) on the **Search Results** pane, click **"Connect"** button to send them a connection request.



Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account, and when they accept the request, they will be added to your Contacts. Second, if the contact does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

Connect with an Existing User for Sharing

Search using any of the criteria below.

Name:

Organization:

Username:

Email:

[Search](#) [Cancel](#)

When a connection request is sent, the owner HUD account will get a "Notification". Once the HUD account accepts the connection request, confirmation will be received in your Portfolio Manager account.

- ! Owners must receive HUD's confirmation before proceeding to the next steps.

Share

Once the connection between the two accounts is established, users can share the property(ies) with HUD's account.

1. Under Sharing tab, click **Share with your Utility or Service Provider for exchanging data** button.
2. Under **Select People (Account)** section, select the **HUD Multifamily Benchmarking (HUDMultifamilyBenchmarking)** contact. If you do not have this account in your list, check to see if they have accepted your connection request.
3. Select the properties you want to share by clicking the **Select Properties** button. You can select a single property, multiple properties, a group of properties or all properties in your account. Click **Apply Selection** button.
4. Under **Choose Permissions** section, select **Personalized Sharing & Exchange Data ("Custom Orders")** option and click the **Set Permissions** button.
 - a. On the next **Select Permissions for Each Contact** page, check the **Read Only Access** and **Exchange Data** radio buttons.
 - b. On the next **Choose Permissions** screen, select **Exchange Data Read Only Access (with read only access to all properties and meters)** option and click **Apply Selections & Authorize Exchange** button.

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

Search

HUD Multifamily Benchmarking (HUDMultifamilyBenchmarking)
IREMS Interface with HUD Multifamily Housing

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Connect

MyPortfolio **Sharing** **Reporting**

My Shared Properties (79)

Share (or Edit Access to) a Property

Share with your Utility or Service Provider for exchanging data

Download Sharing Report

1 **Select Web Services Provider (Account)**

Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.

Select web services provider from my contacts book:

HUD Multifamily Benchmarking (HUDM)

1 **Select Properties**

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

Select Properties

[Selected Properties: 1](#)

3 **Choose Permissions**

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions, select the 2nd option.

☐ **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).

☒ **Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give **Exchange Data** permission.

Continue **Cancel**

3 **Choose Permissions**

If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

☒ **Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.

☐ Exchange Data Full Access (with full access to all properties and meters)

☒ Exchange Data Read Only Access (with read only access to all properties and meters)

☐ Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)

☐ Remove Access (i.e. remove existing access to all properties)

☐ **Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

Authorize Exchange **Cancel**

After you've successfully shared your property, you will receive two (2) alerts in the **Notification** section:

1. When a share request is sent to HUD, and
2. When the HUD Multifamily Benchmarking account has accepted your sharing request.