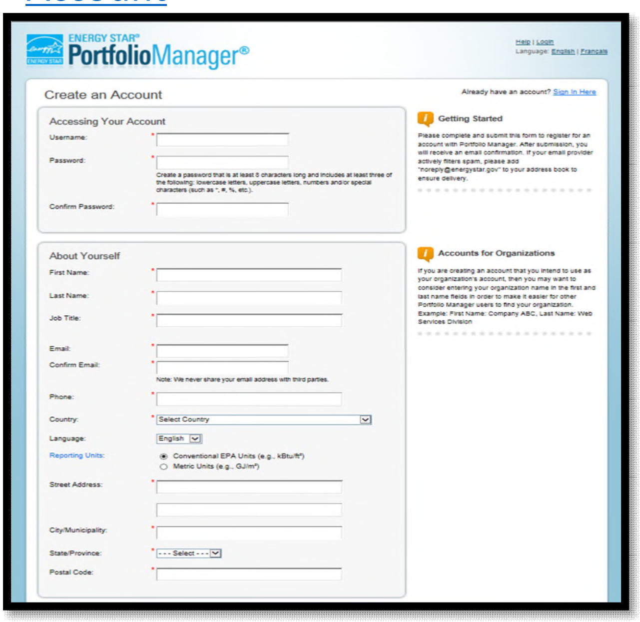
CNA e-Tool Version 3.0

The very first thing an owner or their energy professional should do is register for a Portfolio Manager account and login before they will be allowed access to the HUD Custom Reports:

- Sign Up for a Portfolio Manager Account



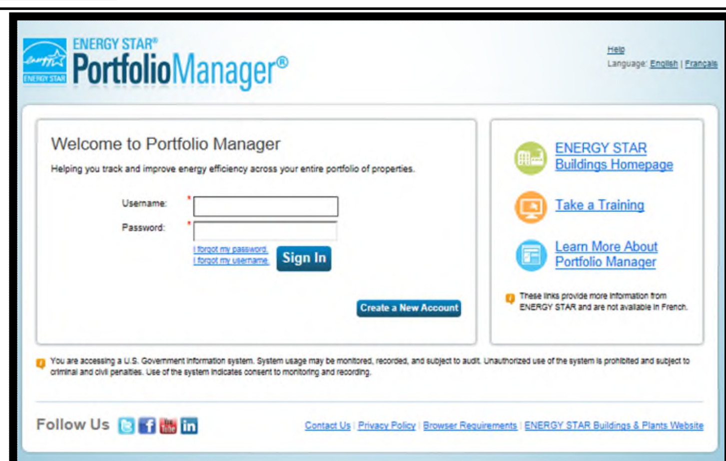
About EPA’s Portfolio Manager

EPA’s ENERGY STAR Portfolio Manager tool helps owners measure and track the energy and water use, and greenhouse gas emissions of their buildings, all in a secure online environment. The owner can use the results to identify under-performing buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance.

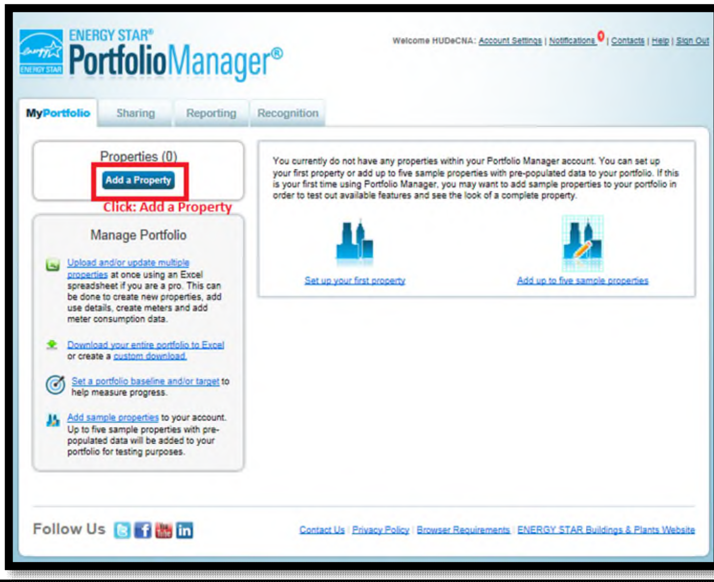
By entering details about the property and consumption data, the owner can:

- Assess whole building energy performance.
- Track changes in energy, water, greenhouse gas emissions, and cost over time.
- Track green power purchases.
- Create custom reports.
- Share data with others.

- Login to Portfolio Manager



Click: Add a Property

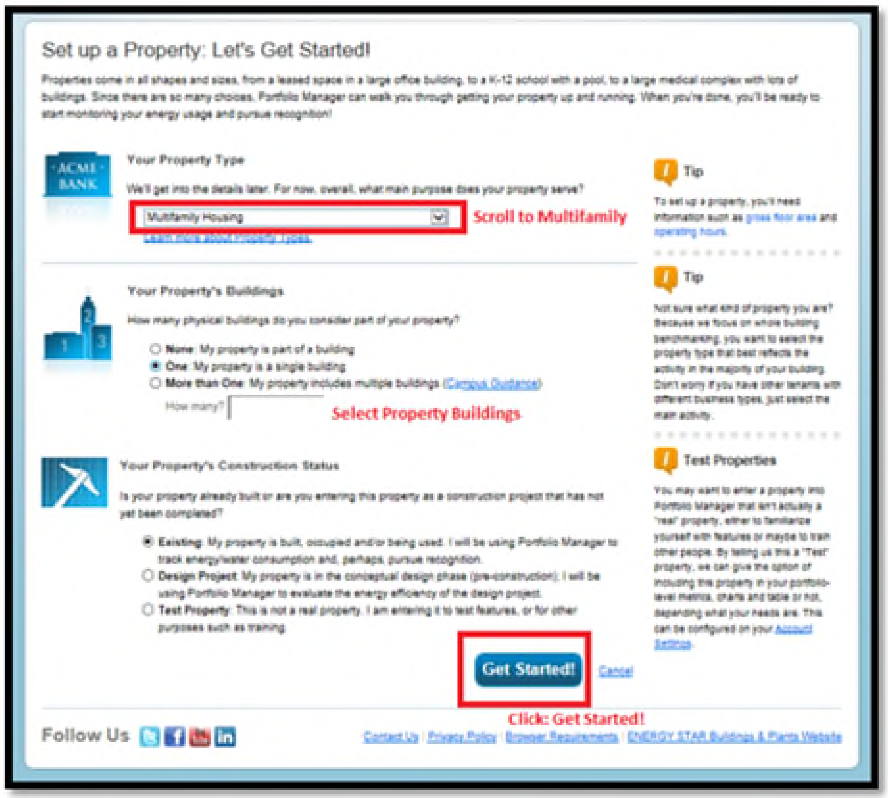


Fill out Property Type

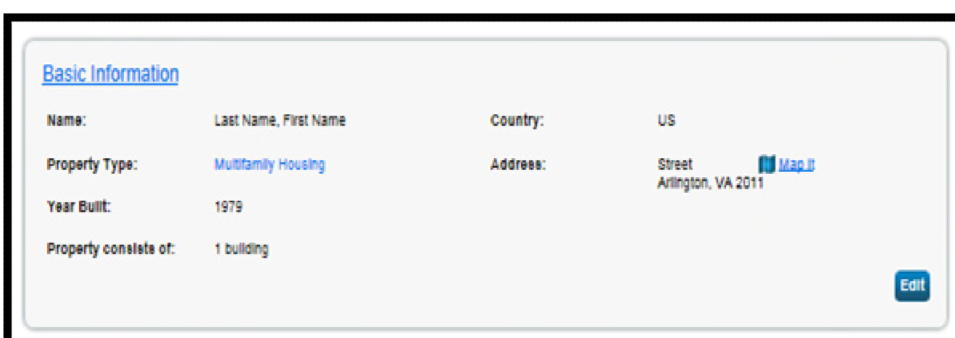
Fill out Property Buildings

Fill out Property Construction Status

Click: Get Started!

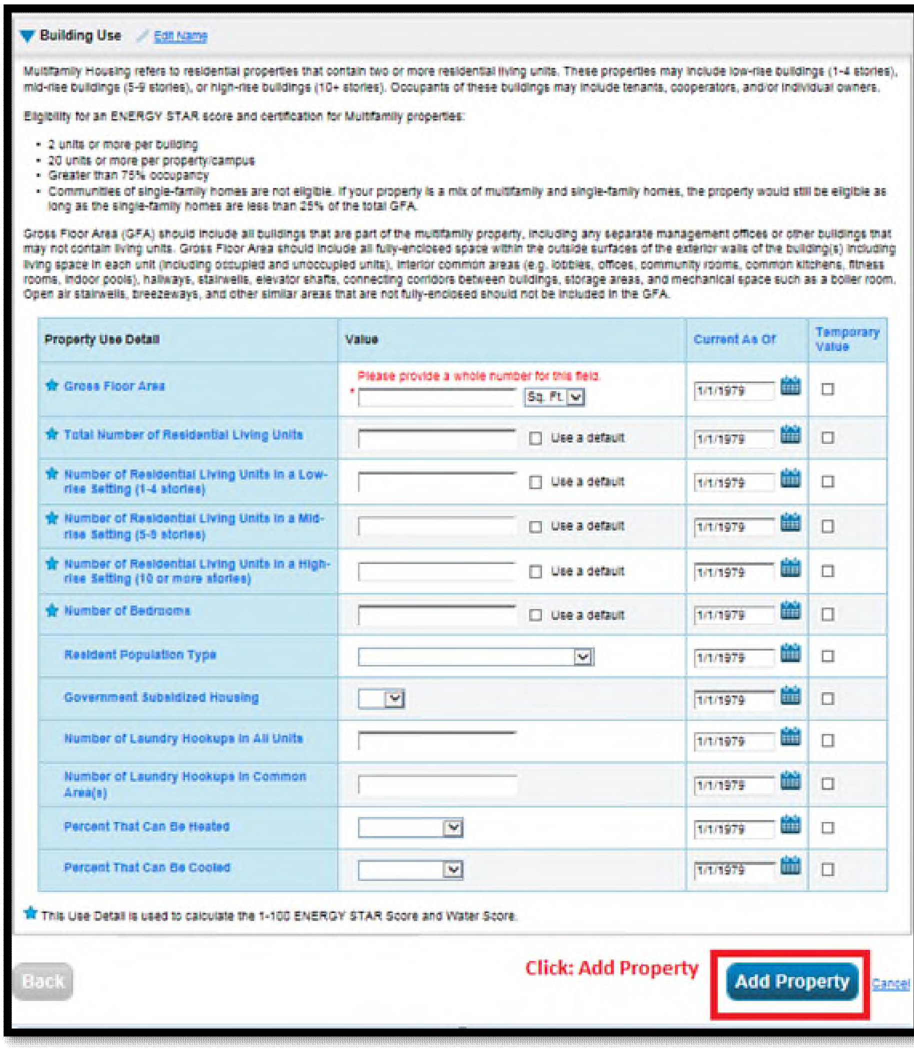


Provide Basic Information



Fill out all of the required information in Building Use

Click: Add Property



After Property is created - Here are the links to EPA Portfolio Manager HUD Custom Reports (SEP or SEDI):

- Get HUD Custom SEP

  For existing properties with recent full 12 months of normal operating history. Note that the owner or their Energy Professional must select Excel as the download option. This will be an .xlsx file extension.

- Get HUD Custom SEDI

  For properties to be built, adaptively reused, or rehabilitated. Note that the owner or their Energy Professional must select Excel as the download option. This will be an .xlsx file extension.

- [Get HUD Custom SEP](#) – What it will look like:

Complete this form to respond to the "HUD Custom SEP" for HUD MF Housing. This response has also been added to your "Templates & Reports" list on the Reporting tab.

Respond to Data Request: HUD Custom SEP

from HUD MF Housing (US Department of Housing & Urban Development)

About this Data Request

Data Requested By: HUD MF Housing

Instructions:

These instructions assist you in preparing a data request response that you will download to your local PC as an Excel file which you should save as "(property name) SEP yr ending (mm-dd-yyyy)" This file may be used to benchmark utility consumption for any property for which such a report is required as an attachment to a HUD Capital Needs Assessment (CNA) prepared in the CNA e Tool. After saving the file you will provide it to your lender who will attach the file to the CNA when it is submitted. This report may also be used to satisfy periodic benchmarking requirements as and when specified by HUD for insured or assisted properties. Follow these directions when completing this data request:

Select only the single property which is the subject of the CNA or the benchmarking requirement.

Select the most recent 12 month period, no partial months.

Download the data request response as an Excel file.

Save the file in Excel format with the name "(property name) SEP yr ending (mm-dd-yyyy)"

Communicate the file to HUD per program instructions

DO NOT ALTER THE FILE. Altering the file represents a false statement, a prosecutable offense under the False Claims Act.

If you see an error in the file, you must correct the error by correcting the data inputs to Portfolio Manager, not by altering the Excel file report.

DO NOT RESPOND TO THE DATA REQUEST VIA PORTFOLIO MANAGER

For help, contact: HUD MF Housing at CNAETool@hud.gov or 202-402-4087

Responding to Data Requests

You are viewing this screen because someone has asked you to provide data to them in the form of a data request. To respond, simply fill out the information on this screen and select what properties you wish to include (some decisions may have been made by the data requestor.)

Also see the How to Respond to Data Requests guide.

About Your Response

Who is this data being submitted on behalf of?

(•) myself
( ) someone else

Submitting Data for Someone Else

Sometimes people delegate their responsibilities for responding to data requests to other people. If you are responding on behalf of someone else, please select their name from your Contacts Book so that they will be attributed to the response.

Your Response

Select Information to Include:

Timeframe: * Current Year for: Energy

If the data requestor has specified a timeframe for the request, you will not be able to change it.

Properties: * One Property | Test Building

The data requestor may have asked for one or more standard IDs to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response.

Previewing Reports

Making selections here will include specific properties and timeframes in your response. You may preview your response before you send it. However, Portfolio Manager will need to prepare the preview in order for you to view it. Large responses may take more time to prepare. Your response preview will be available from the "Templates & Reports" section on the Reporting tab when it is ready.

Click: Generate Response Preview

Generate Response Preview Cancel

- Get HUD Custom SEDI – What it will look like

Complete this form to respond to the "HUD Custom SEDI" for HUD MF Housing. This response has also been added to your "Templates & Reports" list on the Reporting tab.

Respond to Data Request: HUD Custom SEDI

from HUD MF Housing (US Department of Housing & Urban Development)

About this Data Request

Data Requested By: HUD MF Housing

Instructions:

These instructions assist you in preparing a data request response that you will download to your local PC as an Excel file which you should save as "(property name) SEDI projected yr ending (mm-dd-yyyy)" This file may be used to describe expected utility consumption and resulting ENERGY STAR score for your project assuming completion of construction as designed and must be used as a required attachment to a HUD Capital Needs Assessment (CNA) prepared in the CNA e Tool. After saving the file you must provide it to the lender who will attach the file to the CNA when it is submitted. Follow these directions when completing this data request:

Select only the single property which is the subject of the CNA

Download the data request response as an Excel file.

Save the file in Excel format with the name "(property name) SEP yr ending (mm-dd-yyyy)"

Communicate the file to HUD per program instructions

DO NOT ALTER THE FILE. Altering the file represents a false statement, a prosecutable offense under the False Claims Act.

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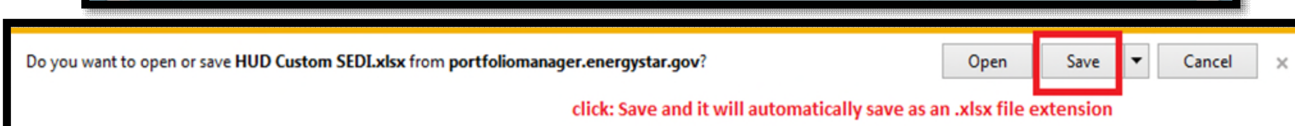
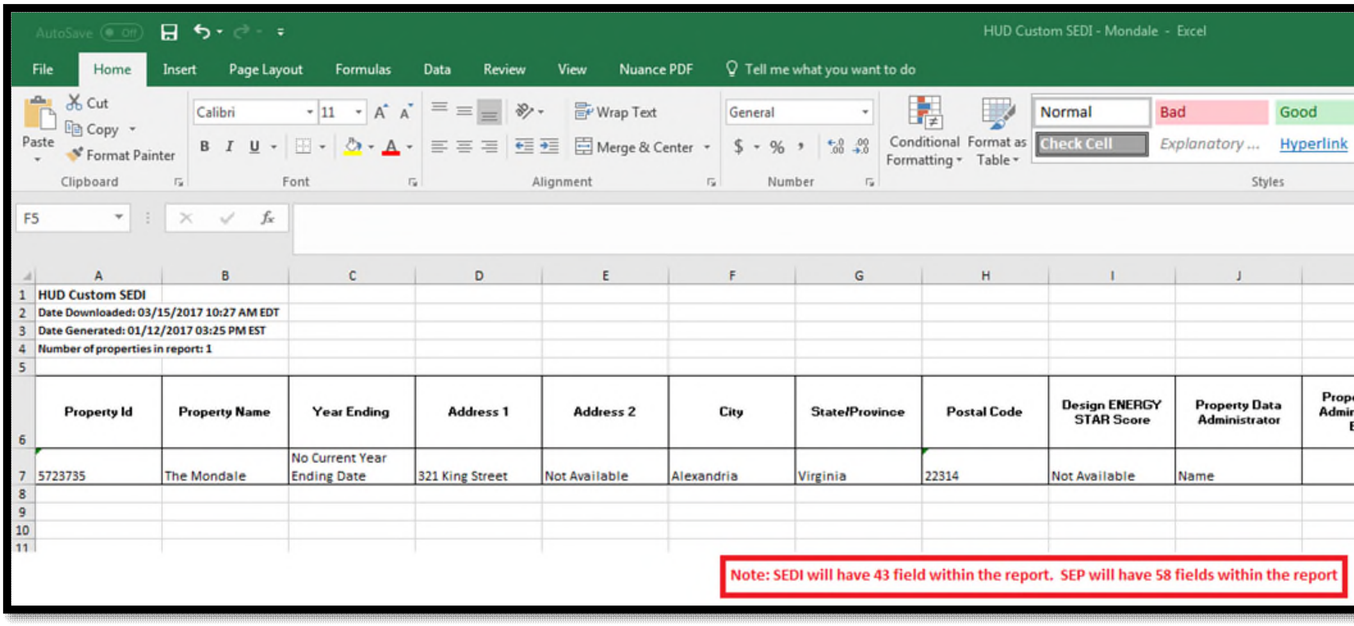
Click: Generate Response Preview

Generate Response Preview Cancel

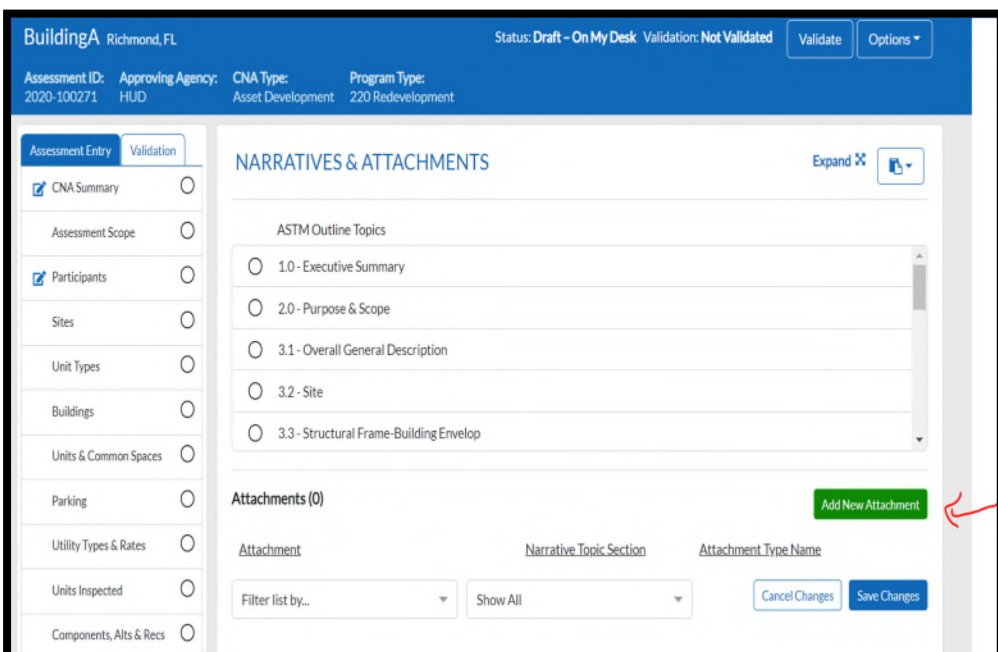
Next Go back to the home screen and Select the Reporting Tab, but do not select a .pdf report

Depending on the type of report needed (SEP or SEDI)
Under Action Header scroll down to:
Download Preview in Excel (.xlsx File Extension)





Here is an example of what the SEDI will look like. Note the SEDI will have 43 fields within the report and the SEP will have 58 fields within the report.



Within the CNA e-Tool Version 3.0 the system can only accept an .xlsx file type for SEP or SEDI attachment

Q: How do I release data to the Department of Housing and Urban Development (HUD) for my multifamily property's Capital Needs Assessment (CNA)?

A: As part of the CNA submission process for those applying for Reduced MIP reduction, HUD requires housing providers to release Portfolio Manager data for their multifamily property using one of two data requests:

- The HUD Custom SEP - For existing properties with recent full 12 months of normal operating history. Note that the owner or their Energy Professional must select Excel as the download option. This will be an .xlsx file extension.

- The HUD Custom SEDI - For properties to be built, adaptively reused, or rehabilitated. Note that the owner or their Energy Professional must select Excel as the download option. This will be an .xlsx file extension.

Housing providers will first need to make sure all property use details (floor area, number of units, etc.) and energy data across all energy types used at the property, for at least 12 consecutive calendar months, is accurately entered.

Once the data is in place, click the appropriate report link above and follow the instructions on the data request page. This process will generate a response preview by choosing the appropriate property and 12-month period ending date. Download a response preview in Excel and save it with the filename "(property name) SEP year ending (mm-dd-yyyy)" for an SEP or "(property name) SEDI projected yr ending (mm-dd-yyyy)" for an SEDI.

Please provide the file to the lender or submitter, who will then attach the file to the CNA when it is submitted per program instructions. **This file should not be submitted to HUD by sending the data request within Portfolio Manager.** The data request feature is used to generate an Excel-based report that will be uploaded with the CNA submission by the lender (please ensure it is an .xlsx file extension).

If you have questions it is recommended that you first contact the Portfolio Manager Help Desk. In addition, HUD has additional guidance available here, and CNA related questions can be sent to the following email address: CNAeTool@hud.gov. For general background on CNAs and HUD's electronic CNA tool (CNA e Tool), please see HUD's website at the following URL: CNA e-Tool Web Page.

- **Have a specific Portfolio Manager question?**
  Check out www.energystar.gov/buildingshelp

- **Want to contact the help desk?**
  Check out Portfolio Manager Help Desk

- **Want Training? Check out** Energy Star Training

- **Additional Training,**
  Check out GSA Training on the EPA Portfolio Manager