

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.

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](#)

This is a screenshot of the "Create an Account" page on the ENERGY STAR Portfolio Manager website. The page is divided into two main sections: "Accessing Your Account" and "About Yourself". The "Accessing Your Account" section includes fields for Username, Password, and Confirm Password, with a note about password requirements. The "About Yourself" section includes fields for First Name, Last Name, Job Title, Email, Confirm Email, Phone, Country (a dropdown menu), Language (a dropdown menu), Reporting Units (radio buttons for Conventional EPA Units and Metric Units), Street Address, City/Municipality, State/Province (a dropdown menu), and Postal Code. There are also links for "Getting Started" and "Accounts for Organizations".

- [Login to Portfolio Manager](#)

This is a screenshot of the "Welcome to Portfolio Manager" page on the ENERGY STAR Portfolio Manager website. The page features a login section with fields for Username and Password, a "Sign In" button, and a link to "Forgot my password". There is also a "Create a New Account" button. On the right side, there are links to "ENERGY STAR Buildings Homepage", "Take a Training", and "Learn More About Portfolio Manager". At the bottom, there is a footer with "Follow Us" links to social media and a "Contact Us" link, along with links to "Privacy Policy", "Browser Requirements", and "ENERGY STAR Buildings & Plants Website".

Click: Add a Property

The screenshot shows the top navigation bar of the ENERGY STAR Portfolio Manager website. Below the navigation bar, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Under the 'MyPortfolio' tab, there is a section titled 'Properties (0)' with a red box around the 'Add a Property' button. Below this, there is a 'Manage Portfolio' section with several options: 'Upload and/or update multiple properties at once using an Excel spreadsheet', 'Download your entire portfolio to Excel or create a custom download', 'Set a portfolio baseline and/or target to help measure progress', and 'Add sample properties to your account'. On the right side, there is a message stating 'You currently do not have any properties within your Portfolio Manager account. You can set up your first property or add up to five sample properties with pre-populated data to your portfolio. If this is your first time using Portfolio Manager, you may want to add sample properties to your portfolio in order to test out available features and see the look of a complete property.' Below this message are two buttons: 'Set up your first property' and 'Add up to five sample properties'. At the bottom, there is a 'Follow Us' section with social media icons and a 'Contact Us' section with links to 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

Fill out Property Type

Fill out Property Buildings

Fill out Property Construction Status

Click: Get Started!

The screenshot shows the 'Set up a Property: Let's Get Started!' form. The form is divided into several sections. The first section is 'Your Property Type', which has a dropdown menu set to 'Multifamily Housing'. A red box is around the dropdown menu, and a red arrow points to it with the text 'Scroll to Multifamily'. The second section is 'Your Property's Buildings', which has a question 'How many physical buildings do you consider part of your property?' and three radio button options: 'None: My property is part of a building', 'One: My property is a single building', and 'More than One: My property includes multiple buildings (Campus Database)'. A red box is around the 'More than One' option, and a red arrow points to it with the text 'Select Property Buildings'. The third section is 'Your Property's Construction Status', which has a question 'Is your property already built or are you entering this property as a construction project that has not yet been completed?' and three radio button options: 'Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.', 'Design Project: My property is in the conceptual design phase (pre-construction). I will be using Portfolio Manager to evaluate the energy efficiency of the design project.', and 'Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.' A red box is around the 'Get Started!' button at the bottom right of the form, and a red arrow points to it with the text 'Click: Get Started!'. On the right side of the form, there are two 'Tip' boxes and a 'Test Properties' section. The 'Tip' boxes provide information about setting up a property and selecting the main activity. The 'Test Properties' section explains that users can enter a property into Portfolio Manager that isn't actually a 'real' property, either to familiarize themselves with features or to train other people. At the bottom of the form, there is a 'Follow Us' section with social media icons and a 'Contact Us' section with links to 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

Provide Basic Information

The screenshot shows the 'Basic Information' form. The form is divided into two columns. The left column contains the following fields: 'Name:' (Last Name, First Name), 'Property Type:' (Multifamily Housing), 'Year Built:' (1979), and 'Property consists of:' (1 building). The right column contains the following fields: 'Country:' (US) and 'Address:' (Street, Arlington, VA 2011). There is a 'Map It' button next to the address field. At the bottom right of the form, there is an 'Edit' button.

Fill out all of the
required information
in Building Use

Click: Add Property

Building Use [Edit Name](#)

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

Eligibility for an ENERGY STAR score and certification for Multifamily properties:

- 2 units or more per building
- 20 units or more per property/campus
- Greater than 75% occupancy
- Communities of single-family homes are not eligible. If your property is a mix of multifamily and single-family homes, the property would still be eligible as long as the single-family homes are less than 25% of the total GFA.

Gross Floor Area (GFA) should include all buildings that are part of the multifamily 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 outside surfaces of 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 GFA.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	Please provide a whole number for this field. <input type="text"/> Sq. Ft. <input type="button" value="v"/>	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
★ Total Number of Residential Living Units	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Low-rise Setting (1-4 stories)	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Mid-rise Setting (5-9 stories)	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a High-rise Setting (10 or more stories)	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
★ Number of Bedrooms	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
Resident Population Type	<input type="text"/> <input checked="" type="checkbox"/>	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
Government Subsidized Housing	<input type="checkbox"/> <input type="button" value="v"/>	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
Number of Laundry Hookups in All Units	<input type="text"/>	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
Number of Laundry Hookups in Common Area(s)	<input type="text"/>	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/> <input type="button" value="v"/>	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>
Percent That Can Be Cooled	<input type="text"/> <input type="button" value="v"/>	1/1/1979 <input type="button" value="v"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score and Water Score.

[Back](#) [Click: Add Property](#) [Add Property](#) [Cancel](#)

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.

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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.

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Your Response

Select Information to Include:

Timeframe: * for:

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

Properties: *

 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.

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.

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.....


Your Response

Select Information to Include:

Timeframe: * for:

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

Properties: *

 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](#)

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)



Do you want to open or save HUD Custom SEDI.xlsx from portfoliomanager.energystar.gov?

Open

Save

Cancel

X

click: Save and it will automatically save as an .xlsx file extension

AutoSave (ON) HUD Custom SEDI - Mondale - Excel

File Home Insert Page Layout Formulas Data Review View Nuance PDF Tell me what you want to do

Clipboard Font Alignment Number Styles

FS

1	HUD Custom SEDI										
2	Date Downloaded: 03/15/2017 10:27 AM EDT										
3	Date Generated: 01/12/2017 03:25 PM EST										
4	Number of properties in report: 1										
5											
6	Property Id	Property Name	Year Ending	Address 1	Address 2	City	State/Province	Postal Code	Design ENERGY STAR Score	Property Data Administrator	Property Administrator
7	5723735	The Mondale	No Current Year Ending Date	321 King Street	Not Available	Alexandria	Virginia	22314	Not Available	Name	
8											
9											
10											
11											

Note: SEDI will have 43 field within the report. SEP will have 58 fields within the report

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.

BuildingA Richmond, FL Status: Draft - On My Desk Validation: Not Validated Validate Options

Assessment ID: 2020-100271 Approving Agency: HUD CNA Type: Asset Development Program Type: Z20 Redevelopment

Assessment Entry Validation

☒ CNA Summary ☐

☐ Assessment Scope ☐

☒ Participants ☐

☐ Sites ☐

☐ Unit Types ☐

☐ Buildings ☐

☐ Units & Common Spaces ☐

☐ Parking ☐

☐ Utility Types & Rates ☐

☐ Units Inspected ☐

☐ Components, Alts & Recs ☐

NARRATIVES & ATTACHMENTS Expand

ASTM Outline Topics

☐ 1.0 - Executive Summary

☐ 2.0 - Purpose & Scope

☐ 3.1 - Overall General Description

☐ 3.2 - Site

☐ 3.3 - Structural Frame-Building Envelop

Attachments (0) Add New Attachment

Attachment Narrative Topic Section Attachment Type Name

Filter list by... Show All Cancel Changes Save Changes

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](#)