

Benchmarking Metrics Submission Guide

Green Advantage[®] Best Practices

JANUARY 2024

Introduction

This document provides guidance for submitting 2023 Benchmarking Metrics for Freddie Mac Multifamily Green Up® and Green Up Plus® loans.

Benchmarking Metrics are generated in ENERGY STAR® Portfolio Manager® (Portfolio Manager) after entering 12 consecutive months of utility consumption data for the property. Required metrics for submission include: ENERGY STAR® Score, Site Energy Use Intensity, EPA 1-100 Water Score, Water Use Intensity and the Portfolio Manager property identification.

2023 Benchmarking Metrics must be submitted for all Green Up or Green Up Plus loans that:

1. Completed green improvements by the end of 2022; or
2. Were required to input utility consumption data for the entirety of 2023

Check with your Optigo® lender if you are unsure if you should submit.

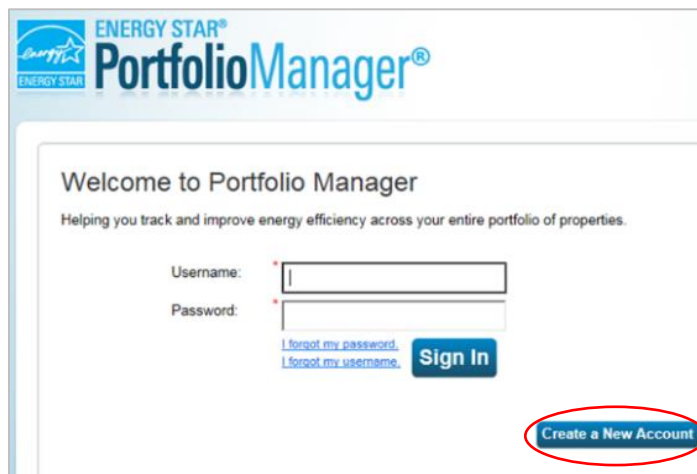
To submit your metrics for 2023, access the [data request link provided here](#) or on the [Freddie Mac website](#). Submissions for the 2023 calendar year are due by March 31, 2024. Please follow the steps below:

1. Gain access to Portfolio Manager
2. Populate Portfolio Manager with Jan-Dec 2023 energy and water consumption and cost data
3. Access the data request link to generate a preview of your submission in Portfolio Manager
4. Review and correct any data as necessary
5. Submit the response in Portfolio Manager

Step 1: Gain Access to Portfolio Manager

Log in to your account at: <https://portfoliomanager.energystar.gov/pm/login.html>

If you are the **borrower** and do not already have an account in Portfolio Manager, go to the webpage above, click on “Create a New Account” (as indicated below) and follow the steps to set up your account.



- If you intend to create the account for your organization, consider entering your organization name in the first and last name fields to make it easier to identify your organization

For example –

About Yourself	
First Name:	Company ABC
Last Name:	Asset Management

- Set Reporting Units to “Conventional EPA Units (e.g. kBtu/ft2)”
- Be sure Searchability is “Yes” to enable connecting with other Portfolio Manager accounts and property sharing
- Upon registration submission, you will receive an email confirmation that your account is set up

Once you have set up your account, connect with your Optigo lender to obtain access to the original property set up by the Green Consultant at the time of underwriting. More guidance on how to gain access to the property can be found at:

- [Benchmarking Data Collection Guide](#)
- [Benchmarking Metrics – Getting Started](#)

Step 2: Populate Portfolio Manager

With Jan-Dec 2023 energy and water consumption and cost data

Benchmarking Data must be entered for all of the 2023 calendar year, January through December, and consist of:

- Aggregate data from utility providers which may include both owner-paid and tenant-paid data
 - Check with [your utility companies](#) to see if they provide aggregate whole property data
 - If aggregate data includes owner-paid data, do not double count the owner-paid data. Input only the whole property data received from the utility
 - Consider tracking the owner-paid data in a separate meter in Portfolio Manager and mark it as 'not in use'. Use the owner-paid bills as a data quality check on the whole property data
- If aggregate whole property data is unavailable, the data should consist of 12 consecutive months of:
 - Owner-paid or owner-managed (RUBS) energy and water consumption
 - A minimum 10% tenant-paid energy and water consumption; and
 - An estimate of the remaining tenant energy and water usage not collected;
 - Estimated data must be indicated in Portfolio Manager
 - Estimated usage is not acceptable for owner-paid and owner-managed (RUBS) data
- All cost data

Important Note: Benchmarking Metrics cannot be generated in Portfolio Manager without 12 consecutive months of consumption data. Cost data paired with consumption data will allow for analysis of property performance, savings potential, and savings comparison at the property.

Use Portfolio Manager's Data Quality Checker to identify possible errors or unusual data for a given year.

Data Quality Checker

Run a check for any 12-month time period to see if there are any possible errors found with your data.

In the Summary tab, click on Check for Possible Errors.

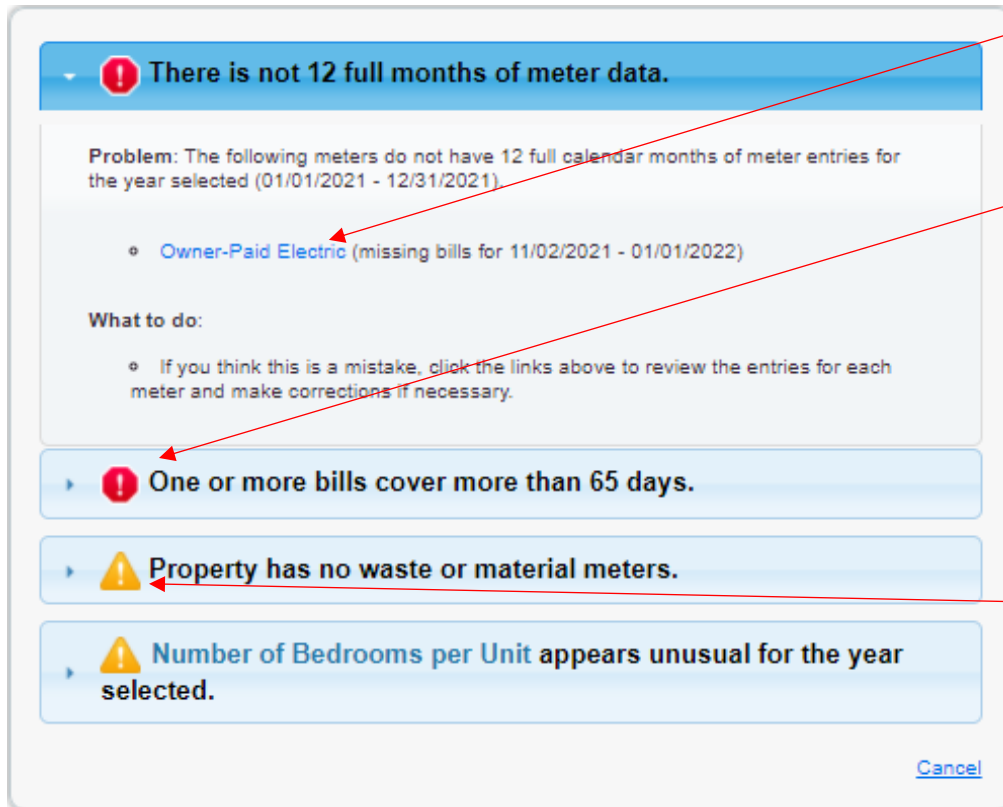
Select Timeframe & Run Checker

We check data for a full year (12 months) of meter consumption and Property Use Details (called a [Metric Year](#)). Select a [Year Ending Date](#) and click "run checker" to see possible data issues.

Year Ending: *

Choose December 31, 2023 as the Year Ending Date, and click Run Checker

Portfolio Manager will identify potential errors and unusual data.



Links are provided to view and correct data as needed

Red alerts indicate data is incomplete or missing. Portfolio Manager might not be able to calculate some metrics. These issues should be resolved immediately

Yellow alerts indicate data is atypical. Data should be reviewed to ensure metrics are calculated correctly for the property.

Additional information on data collection and data quality best practices can be found in the [Benchmarking Data Collection Guide](#).

Additional information on data entry and meter set up can be found at:

- https://www.energystar.gov/sites/default/files/buildings/tools/EnergyStar_DataIn_103013_508.pdf
- <https://energystar-mesa.force.com/PortfolioManager/s/topic/0TOt00000008fJIGAI/metrics-general>

Step 3: Generate a Preview of Your Submission

Click on the data request link below to respond to the 2023 Benchmarking Metric submission and select the requested information as shown below. Once you have initially accessed the data request by clicking on the link, the data request will always appear within your Portfolio Manager account in the “Reporting” tab and can be accessed there at any time.

<https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/48535f01-be1c-4e4a-a2b0-f7b197930206>

About Your Response

Who is this data being submitted on behalf of?

myself
 someone else

Your Response

Select Information to Include:

Timeframe: * Single Year | Dec 31 | 2018

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

Properties: - Select Number of Property(ies) -

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.

Generate Response Preview Cancel

In the “About Your Response” section:

- If you are the **borrower**, select “myself”
- If you are submitting data on behalf of the borrower, select “someone else” and enter your information as prompted

In the “Your Response” section:

- The time frame will be automatically set
- Select the number of properties for submission

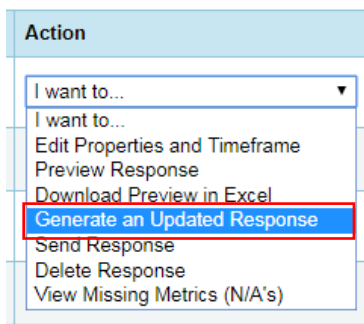
Click “Generate Response Preview” once completed.

Step 4: Review and Correct Data

If errors were not resolved in the Data Quality Checker, they will show up again in your response preview generated in Step 3, and you will receive a notification as shown below. Click “Read more” to receive more information on the error and note any potential missing data. Review and correct all errors as prompted. Detailed information on “What to do” to correct the error will be provided as well.

⚠ Your new response preview(s) has been generated, however basic metrics could not be calculated for one or more properties in the request. [Read more](#)

Once all errors have been corrected, click on the “Reporting” tab and from the Action drop-down, select “Generate an Updated Response.”

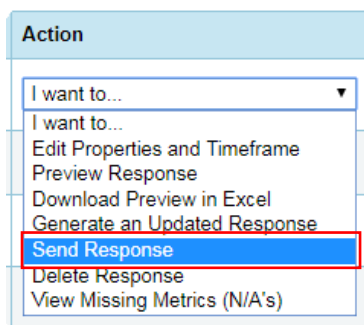


Before proceeding to Step 5

Please ensure that all errors and “Missing Metrics (N/A’s)” have been corrected accordingly.

Step 5: Submit in Portfolio Manager

After you generate the response preview, click on the “Reporting” tab to find the 2023 Freddie Mac Benchmarking Metrics Request report template. From the Action drop-down (shown to the right), select “Send Response.”



After clicking “Send Response,” you will be prompted to confirm your response:

1. Select Freddie Mac Green Advantage Reporting contact
2. If we are not listed as a contact, please enter our email, green_advantage_reporting@freddiemac.com in the “Optional- Additional Email Addresses” box to send us a confirmation email
3. The selected format must be “Excel”
4. Enter your username and password to E-Sign the response
5. Click “Send Data” once completed

Confirm Response to Data Request from Freddie Mac Green Advantage Reporting (Freddie Mac)

By clicking Send Data, you will release data to Freddie Mac Green Advantage Reporting (Freddie Mac). You will receive a confirmation email with a receipt and a copy of the data attached.

1 Who (besides you) should we send a confirmation email to?

Select contacts from your contacts book:

Freddie Mac Green Advantage Rep

To select multiple contacts, hold down your Control (CTRL) key and click on each selection.

Optional- Additional Email Addresses:

Separate multiple emails by a comma or semicolon.

2 What format would you like your data in for the email attachment?

3 Excel
 XML

3 E-Sign your Data Response, then "Send Data"

I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Freddie Mac Green Advantage Reporting with Freddie Mac.

Your username: **4**

Your password: **4**

i **About Releasing Your Data**

Once you have chosen to release your data, there is no way to retract it. Please [preview](#) your report to identify any data issues before sending to avoid incomplete or incorrect data being released.

i **About Signing Your Response**

Please provide login credentials (username and password) to electronically sign your response.

Helpful Links

Energy Star Portfolio Manager link on “How to respond to Data Requests in Portfolio Manager”

- <https://www.energystar.gov/buildings/tools-and-resources/how-respond-data-requests-portfolio-manager>

Energy Star Portfolio Manager link on “Utilities Providing Energy Data for Benchmarking in Energy Star Portfolio Manager”

- https://www.energystar.gov/buildings/tools-and-resources/utilities_increase_access_energy_data_help_commercial_customers_benchmark

Benchmarking Data Collection Guide

- <https://mf.freddiemac.com/docs/benchmarking-data-collection-guide.pdf>

Video Demonstrations

- [Getting Started with Portfolio Manager and Benchmarking Reporting](#)
- [How to Share a Property on Portfolio Manager](#)
- [How to Submit Benchmarking Metrics](#)

Please contact Freddie Mac for additional assistance or information at green_advantage_reporting@freddiemac.com.