



Green Advantage[®]: 2018 Benchmarking Metrics Submission Guide

This document provides guidance for submitting 2018 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.

2018 Benchmarking Metrics must be submitted for All Green Up[®] or Green Up Plus[®] loans that:

- 1) Completed green improvements by the end of 2017; or
- 2) Were required to input utility consumption data for the entirety of 2018
 - a. Generally, these were loans originated between October and December 2017

All others are not required but are encouraged to submit. Check with your Servicer if you are unsure if you should submit.

To submit your metrics for 2018, access the data request link provided [here](#) or on the [Freddie Mac website](#). Submissions for the 2018 calendar year are due by **March 31, 2019**. Please follow the steps below:

1. Gain access to Portfolio Manager
2. Populate Portfolio Manager with Jan-Dec 2018 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

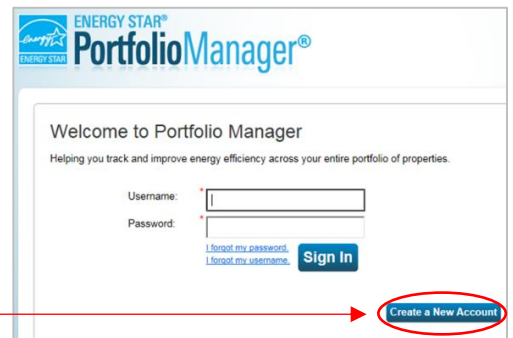
Log in to your account at: <https://portfoliomanager.energystar.gov/pm/login.html>

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 on the right) 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:	<input type="text" value="Company ABC"/>
Last Name:	<input type="text" value="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 Servicer 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](#)

STEP 2: Populate Portfolio Manager with Jan-Dec 2018 energy and water consumption and cost data

Benchmarking Data must be entered for the entirety of the 2018 calendar year, January – December and consists 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.

Additional information on data collection and data quality best practices can be found at: [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://portfoliomanager.zendesk.com/hc/en-us/categories/201357937-Meters>

STEP 3: Access the data request link to generate a preview of your submission in Portfolio Manager

Click on the data request link below to respond to the 2018 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/e48cc86b-29c0-4023-8a0c-c89fec153730>

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

In the “About Your Response” section (shown at the left):

- 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 (shown at the left):

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

Click “Generate Response Preview” once completed.

STEP 4: Review and correct any data as necessary

If there are errors in your response preview generated in Step 3, 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 (shown to the right) 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.

Action

- I want to...
- I want to...
- Edit Properties and Timeframe
- Preview Response
- Download Preview in Excel
- Generate an Updated Response**
- Send Response
- Delete Response
- View Missing Metrics (N/A's)

STEP 5: Submit the response in Portfolio Manager

After you generate the response preview, click on the “Reporting” tab to find the 2018 Freddie Mac Benchmarking Metrics Request report template. From the Action drop down (shown to the right), select “Send Response.”

Action

- I want to...
- I want to...
- Edit Properties and Timeframe
- Preview Response
- Download Preview in Excel
- Generate an Updated Response
- Send Response**
- Delete Response
- View Missing Metrics (N/A's)

After clicking “Send Response” you will be prompted to confirm your response (shown to the left):

1. Freddie Mac does not require you to send your response to any additional recipients, but you can do so here
 2. The selected format must be “Excel”
 3. Enter your username and password to E-Sign the response
- 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 Reg...

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?

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:

Your password:

E-Sign Response

Send Data Cancel

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>

Please contact Freddie Mac for additional assistance or information

- green_advantage_reporting@freddiemac.com