**Role of Benchmarking Service Providers**

1. Create a Portfolio Manager account for the property and populate the account with the necessary physical characteristics (number of units, building size, etc.).
2. Automatically connect to your utility accounts and populate with monthly energy usage and cost data from previous full calendar year.
   1. Monthly usage data should include, but not be limited to: all fuel usage (oil, gas, electricity, steam) and water for **all** **building** utilities (**owner-paid** **and resident-paid).**
   2. Provide the respective costs for each utility.
   3. Unique circumstances (document in NOTES IN Portfolio Manager)::
      1. If resident-paid utility usage cannot be obtained, you may provide owner-paid usage data only. Request utility company give an ‘aggregate’ usage and cost for the property without tenant details (by address or building number)
      2. Some utility data may not be billed monthly (such as fuel oil, propane, and water) but should still be included in the data submission in the manner it is billed.
      3. If whole building utilities were acquired: under the “Metered Areas” data field in Portfolio Manager, select “Total energy (or water) consumption for the whole building”
      4. If only owner-paid utilities were acquired: “Consumption for common areas only“
      5. Use the “Notes” data field to explain any unique situations, or contact HCRbenchmarking@swinter.com if you have any questions
      6. If cost data is not available or cost effective to collect, it can be omitted.
3. Perform quality assurance checks on the data to ensure all necessary energy and water data is accurately included in the Portfolio Manager account.
4. Ensure that the HCR designated identification number is entered into the Custom 1 data field (Either a SHARS # (begins with the year project funded), HFA #, or HID #).
5. In subsequent years, filing on an annual basis should be made prior to May 1st of each year.
6. Share the data with HCR through the following reporting link: <https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/9ca5e9d2-8381-47f4-99de-dbe5fe46295b>

QUESTIONS? Send email to HCRbenchmarking@swinter.com