

New to Portfolio Manager?

An account can be created at the EPA's [Portfolio Manager](#) website. Once your account is set up, we recommend referring to a [Portfolio Manager Quick Reference Guide](#) to learn how to enter your property's energy use information. Once property information is entered, then open the "HCR - Benchmarking Report - Filing Year 2022" report template to report energy and water usage information.

How to Access "Data Request:HCR - Benchmarking Report - Filing Year 2022" report template after you created an account

- To access the data request for the first time, click the link "Data Request:HCR - Benchmarking Report - Filing Year 2022" and then log in to Portfolio Manager as prompted. You will be directed to the Respond to Data Request page.
- Once you have initially accessed the data request by clicking on the external link above, the data request will always appear within your Portfolio Manager account in the Reporting tab and can be accessed at any time in the future by following these steps:
 - Log into your Portfolio Manager account at: www.energystar.gov/buildings
 - Go to the Reporting tab
 - Under Templates and Reports, find "Data Request:HCR - Benchmarking Report - Filing Year 2022"
 - From the Action Menu, select "Respond to Data Request"

Please review these instructions carefully before submitting your report to Portfolio Manager.

STEP 1: Identify Your Property(ies) that needs to share data with **New York State Homes and Community Renewal (HCR)** by reviewing the "covered building" criteria and the Covered Building List on the HCR website hcr.ny.gov/steps-hcr-benchmarking-program.

STEP 2: Enter the unique HCR property ID (e.g. HID number or SHARS-SAMIS number) in the **Custom ID 2** field under the **Unique Identifiers (IDs)** section of the **"Details"** tab. The unique HCR property ID can be found on the Covered Building List on the HCR website hcr.ny.gov/steps-hcr-benchmarking-program.

STEP 3: Enter all Energy and Water Data for Your Property(ies)

Enter monthly energy usage and water usage data for the entire year 2021 (January 1 to December 31 inclusive) for each meter associated with the property.

NYC and Non-NYC properties must submit whole building energy use data. If whole building data is not available or cannot be obtained from the utility company, please contact HCR at hcr.sustainability@hcr.ny.gov

NYC properties must submit whole building energy use data, in accordance with NYC LL84.

On the "Energy" tab of your Portfolio Manager account, Click "Change Meter Selections"

- Select the Active Meters that account for the energy consumption of the building.
- If the meters account for the **whole building energy use**, then select **"These meters account for the total energy consumption"**
- If the meters account only for the **owner paid energy use**, then select **"These meters do not account for the total energy consumption "**
- Then under **"These meters only account for"** select the **third option "Tenant and/or common areas (partial energy loads)"**

- Now select **all the relevant energy loads** that the meters account for, from the options displayed.

STEP 4: Check Data Quality

4A. Use the Portfolio Manager data quality checker

Check your submitted data by clicking the "Check Data Quality" button on the "Summary" tab of each of your properties. Review and/or resolve all alerts. This step may greatly improve the accuracy of the data submitted in Portfolio Manager.

4B. Review your portfolio for common errors

To ensure completeness, check the following:

- Check that you have entered a full year (2021) of data (covering January 1 to December 31 inclusive) for each meter.
- Make sure that your Energy Use Intensity (EUI) is realistic; an unrealistic EUI is below 5 or above 1,000 kBtu/sf
- Check the basic information and property uses in the "Details" tab for each building to be sure that gross floor area for the building is greater than zero and all property uses add up to the total gross floor area.

STEP 5: Release Data to HCR

5A. Submit Your Report

Once you have entered all your data and checked for errors, navigate to the "Reporting" tab in Portfolio Manager and locate the "HCR – Benchmarking Report – Filing Year 2022" reporting link.

- Under "Action" next to the report name, select "Respond to Data Request"
 - Scroll to the bottom of the page and fill in the fields in the "About Your Response" and "Your Response" sections.
 - Press the "Generate Response Preview" button.
- Navigate back to the "Reporting" tab. You may preview your response, download your response to a spreadsheet, or modify or delete your response from the "Reporting" tab.
- When you are ready to submit your report, select "Send Response."
 - If Portfolio Manager flags errors, correct them.
 - In the "Reporting" tab choose "Generate an Updated Response."
- Once all errors are corrected and an error-free updated report is generated:
 - Select "Send Response;"
 - Enter any contacts who should also receive a confirmation email;
 - E-sign the response; and
 - Press the "Send Data" button.

5B. Save a copy of your response for your records.