

A GUIDE ON HOW TO USE THE ENERGY STAR PORTFOLIO MANAGER



What is the ENERGY STAR Portfolio Manager?

An interactive tool that provides an ENERGY STAR score comparing your building's energy performance to similar buildings nationwide. This includes homes, schools, businesses, places of worship, etc.



Why should you use it?

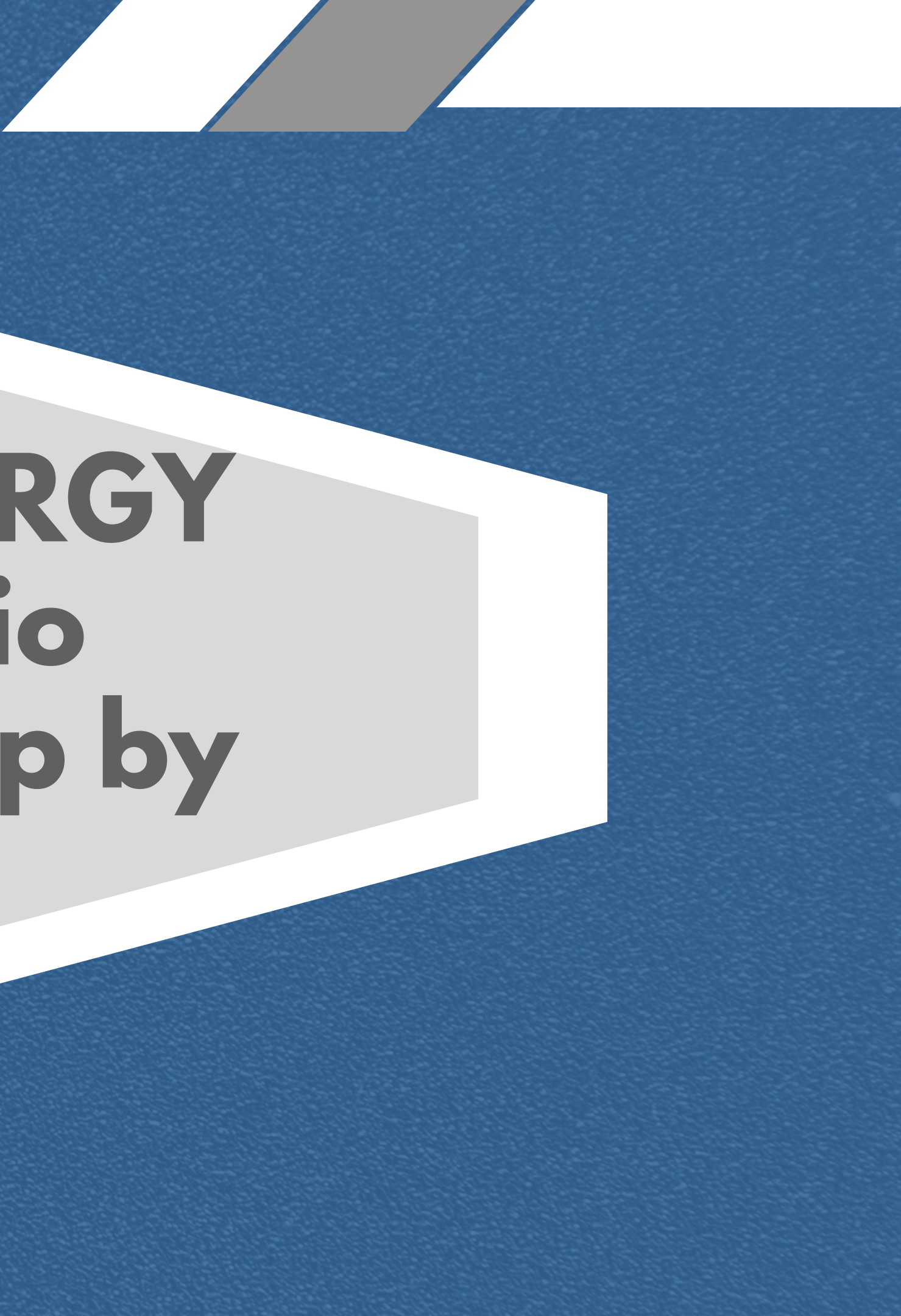
- No-cost interactive energy management tool
- Allows you to securely track and assess energy and water consumption
- Help you set investment priorities
- Identify under-performing buildings
- Apply for ENERGY STAR certification for superior energy performance.



What Information is required?

- ★ • Property type
 - How many buildings are associated with the property
 - Construction status (has it been built)
 - Address
 - Year built
- ★ • Gross floor area
 - Net floor area
 - Irrigated area
 - Occupancy
- ★ • Weekly operating hours
- ★ • Seating capacity
- ★ • Gross floor area used in food preparation
- ★ • Percent of property that can be heated
- ★ • Percent of property that can be cooled
 - Number of weekdays open
 - Number of computers
 - Number of commercial freezer/refrigerator units
 - Ceiling height

★ Used to calculate your 1-100 ENERGY STAR score



**How to use ENERGY
STAR Portfolio
Manager: A Step by
Step Guide**

Using ENERGY STAR Portfolio Manager

- **Part 1: Creating an Account**
- **Part 2: Creating a Building Profile**
- **Part 3: Adding Utility Data**
- **Part 4: Results and Other information**

First, create a profile

🔍 <https://portfoliomanager.energystar.gov/pm/login> 🗣️

Search “ENERGY STAR Portfolio Manager make an account” in your search browser and create a new account.

Fill out the following information to the best of your availabilities, and click “Create My Account”

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: *

Language:

Reporting Units: Conventional EPA Units (e.g., kBtu/ft²)
 Metric Units (e.g., GJ/m²)

Street Address: *

City/Municipality: *

State/Province: *

Postal Code: *

About Your Organization

Organization Name: *

Primary Business or Service of Your Organization: *


Is your organization an [ENERGY STAR Partner](#)? Yes
 No

Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?

Do you want your username to be searchable by other Portfolio Manager users? Yes
 No
You must select "Yes" if you want to [connect](#) with other users to allow automatic upload of utility data or to share properties.

Confirm Your Identity

Please confirm that you are a human I'm not a robot


reCAPTCHA
[Privacy](#) - [Terms](#)

[Cancel](#)

Create a profile for your Building

The screenshot displays the 'MyPortfolio' dashboard with a navigation bar containing 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main content area is divided into two columns. The left column features a 'Properties (0)' section with a red circle around the 'Add a Property' button, and a 'Manage Portfolio' section with five options: 'Upload and/or update multiple properties', 'Download your entire portfolio to Excel', 'Set a portfolio baseline and/or target', 'Add sample properties', and 'Delete properties'. The right column contains a message about adding properties and two buttons: 'Set up your first property' and 'Add up to five sample properties'.

MyPortfolio | Sharing | Reporting | Recognition

Properties (0)
[Add a Property](#)

Manage Portfolio

- [Upload and/or update multiple properties](#) at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.
- [Download your entire portfolio to Excel](#) or create a [custom download](#).
- [Set a portfolio baseline and/or target](#) to help measure progress.
- [Add sample properties](#) to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.
- [Delete](#) properties from your account.

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.

[Set up your first property](#)

[Add up to five sample properties](#)

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Click Add a property to get started!

Note: You can also delete and/or edit the building portfolio created, so don't worry if you don't get it right the first time!

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MyPortfolio | Sharing | Reporting | Recognition

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[Set up your first property](#)

[Add up to five sample properties](#)

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Enter your property type



ACME BANK

Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Library

[Learn more about Property Types.](#)

Your Property's Buildings

How many physical buildings do you consider part of your property?

None: My property is part of a building (e.g., a Tenant Space)

One: My property is a single building

More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?

Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

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.

Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

Get Started! [Cancel](#)

Enter the number of buildings within your property



Enter the construction status of your property



Once you are done, click "Get Started"

Now, enter the additional data required for your building!

Note: if you have a school or office within your property, or any other sort of multi-use area, you will also have to fill this data out for those areas as well.

▼ **Worship Facility Use** / [Edit Name](#)
Delete

Worship Facility refers to buildings that are used as places of worship. This includes churches, temples, mosques, synagogues, meetinghouses, or any other buildings that primarily function as a place of religious worship.

Gross Floor Area should include all areas inside the building that includes the primary worship area, including food preparation, community rooms, classrooms, and supporting areas such as restrooms, storage areas, hallways, and elevator shafts.

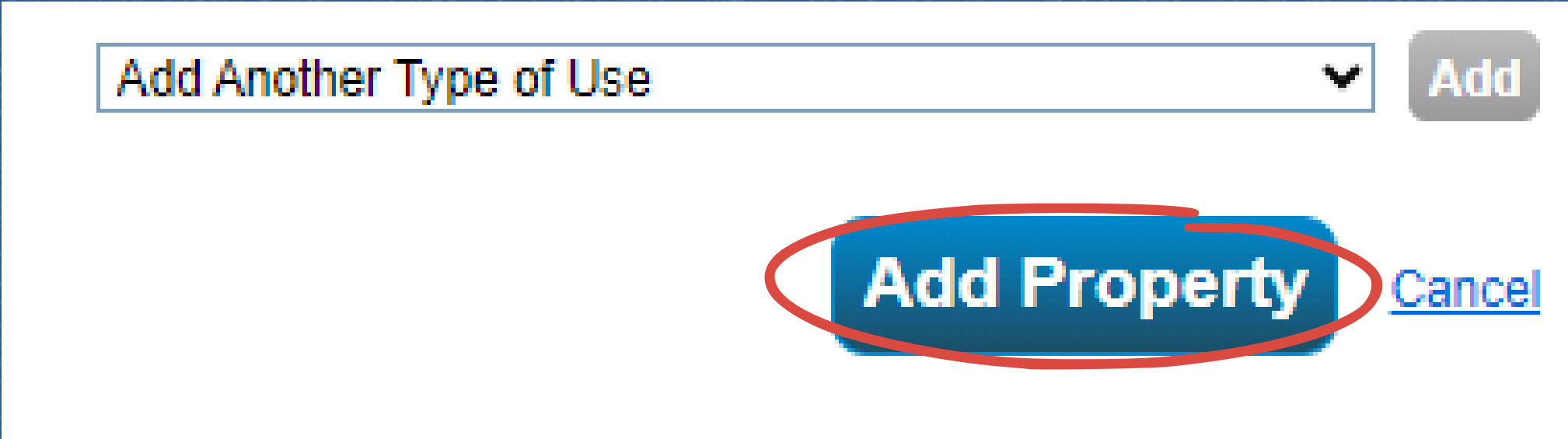
The ENERGY STAR score for Worship Facilities applies to buildings that function as the primary place of worship and not to other buildings that may be associated with a religious organization, such as living quarters, schools, or buildings used primarily for other community activities. To receive an ENERGY STAR score, a Worship facility must have at least 25 seats, but cannot have more than 4,000.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* <input type="text" value="11,000"/> Sq. Ft. ▼	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text" value="33"/> <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
★ Seating Capacity	<input type="text" value="360"/> <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
★ Gross Floor Area Used for Food Preparation	<input type="text" value="0"/> Sq. Ft. ▼ <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	All of it - 100% ▼ <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	All of it - 100% ▼ <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
Cooking Facilities	No ▼ <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
Number of Weekdays Open	3 ▼ <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
Number of Computers	<input type="text" value="1.8"/> <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
Number of Commercial Refrigeration/Freezer Units	<input type="text" value="0.16"/> <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>
Ceiling Height	<input type="text" value="20"/> ▼ <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1962"/>	<input type="checkbox"/>

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

If you would like to add another use (i.e school, office space, etc) for your property, select the correct type and fill in the required information.

Once you have finished entering all the use types, click “Add property.”



A screenshot of a web form. At the top, there is a dropdown menu with the text "Add Another Type of Use" and a downward arrow. To the right of the dropdown is a grey button labeled "Add". Below the dropdown, there is a blue button labeled "Add Property" which is circled in red. To the right of the blue button is a blue link labeled "Cancel".

Inputting Energy Data:

Now that you are done, it is time to input energy data!

Click on the “add energy use information” hyper link at the top to add more detail.

The screenshot displays the 'MyPortfolio' interface for a property named 'Example Place of Worship'. The top navigation bar includes 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. A green notification box states: 'Congratulations! You have successfully created your property. Next, you can: • Add energy use information, so that you can see your energy performance metrics. • Enter specific information about your individual buildings, so that you can track them separately.' The property details section shows the address '0001 Madeup Dr, Fairfax, VA 22030', 'Portfolio Manager Property ID: 29561912', and 'Year Built: 1962'. A 'Map It' link and an 'Edit' button are also present. A 'Weather Normalized Source EUI (kBtu/ft²)' widget shows 'Current: N/A' and 'Baseline: N/A'. Below this is a navigation bar with tabs for 'Summary', 'Details', 'Energy', 'Water', 'Waste & Materials', 'Goals', and 'Design'. The 'Summary' tab is active, showing a 'Refresh to see Source EUI Trend' chart area and a 'Metrics Summary' table. The table lists various metrics with 'Not Available' values for both baseline and current energy.

MyPortfolio | Sharing | Reporting | Recognition

Congratulations! You have successfully created your property.

Next, you can:

- [Add energy use information](#), so that you can see your energy performance metrics.
- [Enter specific information about your individual buildings](#), so that you can track them separately.

Example Place of Worship

0001 Madeup Dr, Fairfax, VA 22030 | [Map It](#)

Portfolio Manager Property ID: 29561912

Year Built: 1962

[Edit](#)

Not currently eligible for ENERGY STAR Certification

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?

Current: [N/A](#)

Baseline: [N/A](#)

Summary | **Details** | Energy | Water | Waste & Materials | Goals | Design

[Refresh](#) to see Source EUI Trend

[Change Metric](#)

[Change Metrics](#)

[Change Time Periods](#)

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total (Location-Based) GHG Emissions Intensity (kgCO2e/ft²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

For the purpose of this demonstration, we selected both electric and natural gas.

If you have information concerning any of the other forms of energy listed, please select those as well!

Once you have selected the energy you wish to track, press the “Get Started!” button.

Get Started Setting Up Meters for Example Place of Worship

There are five ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. Fourth, you can [hire a company to update your data electronically](#). And finally, you can see if your [utility offers the service to update your energy data automatically](#).



Sources of Your Property's Energy

What kind of **energy** do you want to track? Please select all that apply.

- Electric
 - purchased from the grid
 - How Many Meters?
 - generated from onsite solar panels
 - generated from onsite wind turbines
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Coal (anthracite)
- Coal (bituminous)
- Coke
- Wood
- Kerosene
- Fuel Oil (No. 1)
- Other:

Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More.](#)

Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. [Learn more.](#)

Get Started!

[Cancel](#)

First, you have to create a meter entry.

Please enter the type of electricity you receive, the date the meter was installed, as well as the energy units it uses (kWh, MWh, etc)

Once that is done, click the “Create Meter” button

About Your Meters for Example Place of Worship

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

1 Energy Meter for Example Place of Worship (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	C
<input checked="" type="checkbox"/>	Electric Grid Me	Electric - Grid		kWh (thousand	01/01/2021	<input checked="" type="checkbox"/>		<input type="checkbox"/>	1

[Delete Selected Entries](#)
[Add Another Entry](#)

[Back](#) [Create Meters](#) [Cancel](#)

Note: Ensure that you have billing information from your meter start date. If there is a gap in time it will not work.

Now download the “single meter spreadsheet” and fill out the information required. An example is pictured below!

For the sake of the demonstration, we did not put the optional information. Ensure that the dates of the bills correspond to the first day the meter was installed.

Hit the upload button and make sure the information is correct.

Start Date (Required)	End Date (Required)	Usage (Required)	Cost (Optional)	Estimation (Required)	Demand (Optional)	Demand Cost (Optional)
12/15/2020	1/15/2021	1440		No		
1/15/2021	2/15/2021	1560		No		
2/15/2021	3/15/2021	1480		No		
3/15/2021	4/15/2021	1120		No		
4/15/2021	5/15/2021	1520		No		
5/15/2021	6/15/2021	1400		No		
6/15/2021	7/15/2021	1680		No		
7/15/2021	8/15/2021	1560		No		
8/15/2021	9/15/2021	1840		No		
9/15/2021	10/15/2021	1520		No		
10/15/2021	11/15/2021	1640		No		
11/15/2021	12/15/2021	1520		No		

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later.

Your Meter Entries for Example Place of Worship

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

1 Energy Meter(s) for Example Place of Worship

▼ Electric Grid Meter

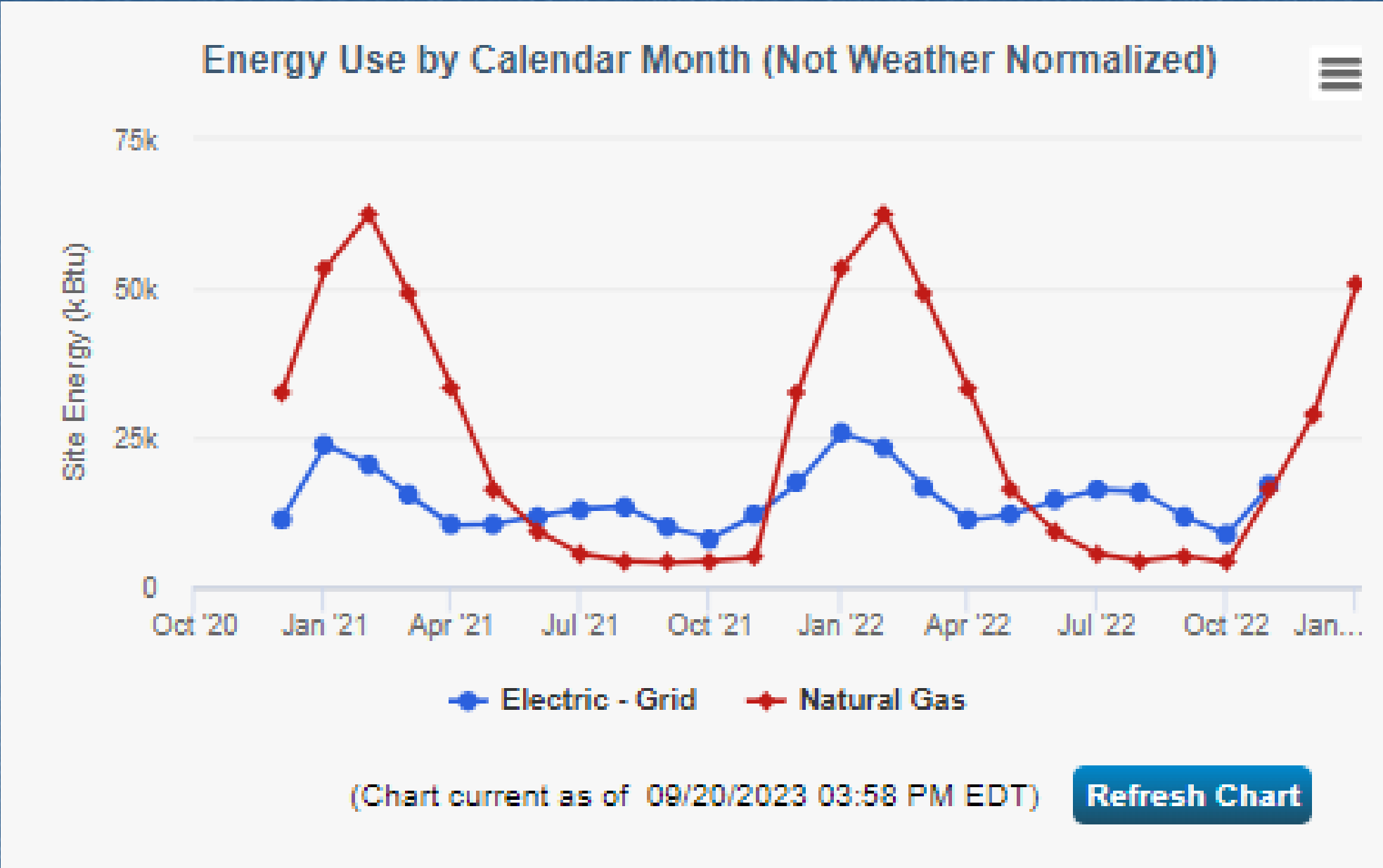
	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
Click to add an entry.								
Delete Selected Entries Add Another Entry Learn how to copy/paste								
Upload data in bulk for this meter:								
Use this single-meter spreadsheet to: <ul style="list-style-type: none"> Upload the completed file below Copy and Paste the data into the table above 								
<input type="button" value="Choose File"/> No file chosen			<input type="button" value="Upload"/>					

[Cancel](#)

Once this is done, upload it to Energy STAR to view your metrics and score!

Results

You will be able to view your energy usage over time under the “Energy” tab



ENERGY STAR Score (1-100)
Current Score: 32
Baseline Score: 42



A score of 75 or greater is needed to be ENERGY STAR Certified.

What to do Next?

- Review and prioritize recommendations
- Evaluate recommendations to your goals
- Use the information to help refine your goals

Look at low/no cost upgrades:

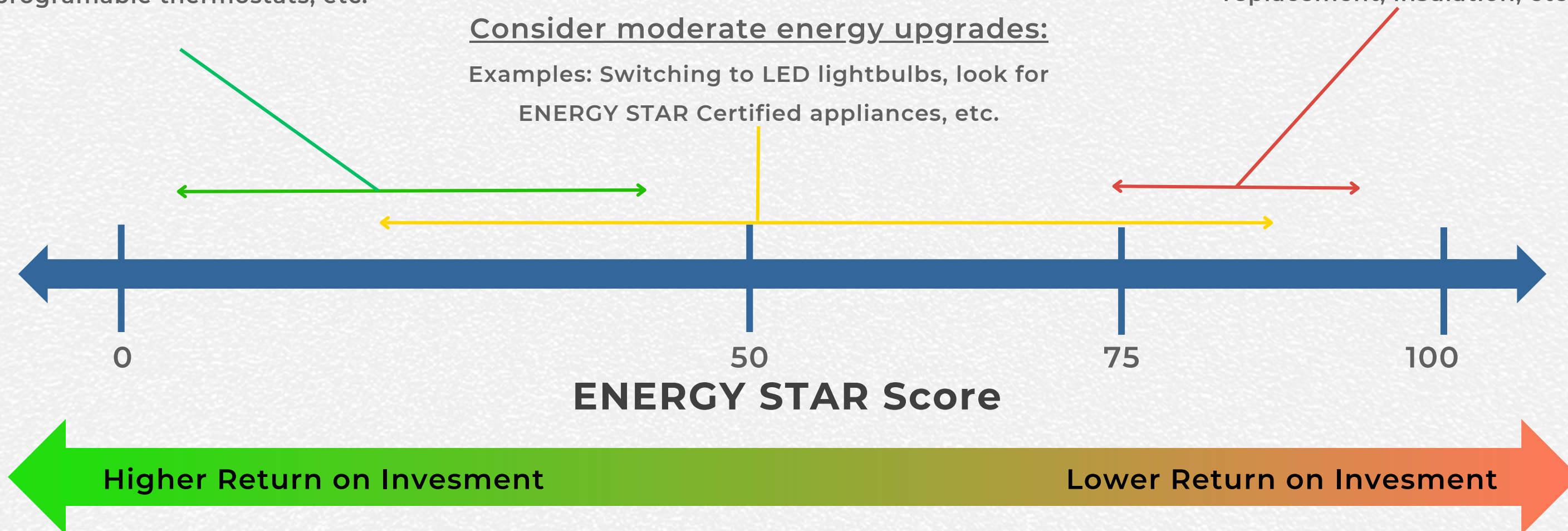
Examples: Turning off the lights, weather stripping, caulking, programable thermostats, etc.

Consider moderate energy upgrades:

Examples: Switching to LED lightbulbs, look for ENERGY STAR Certified appliances, etc.

Consider larger energy investments:

Examples: Update your HVAC system, window replacement, insulation, etc.



Additional Tips:

Make sure you have all of the information about your facility ready, because it is difficult to save your progress. Once you have created your building profile, you can go back and edit it if there is anything that needs changing.



Ensure that you use your own metrics rather than the default whenever possible. If you are unsure, you can always come back later and edit it.

Feel free to play around with the ENERGY STAR Portfolio manager. There is a section for creating goals, viewing additional metrics, and much more!



Resources:

ENERGY STAR portfolio Manager:

[About ENERGY STAR Portfolio Manager](#)

[ENERGY STAR Portfolio manager Tools and Resources](#)

Fairfax County:

[Energy Conservation Assistance Program](#)

[Climate Action Dashboard](#)

[Interactive Climate Action Checklist](#)

[Sign up for the OEEC Monthly Newsletter](#)