

# **DEFAULT DATA - MULTIFAMILY**

## Correcting Default Data in Portfolio Manager

Default data is provided within Portfolio Manager to help owners get a quick ENERGY STAR score, when the exact values for your Property Use Details are not yet known. However, benchmarking reports with default data are considered inaccurate— annual reporting of accurate building energy performance is required per Seattle Municipal Code, Chapter 22.920.

Follow the steps below on to update the default values to actual values, which are required by the City of Seattle for compliance and to apply for ENERGY STAR certification.

### 1. Log into Portfolio Manager

- Log into <u>www.energystar.gov/benchmark</u> with your Portfolio Manager username and password.
- On the My Portfolio Tab, click on the property name to open the summary page.
- Click on the Details tab.

Po	rtfolio	Mana	ger®			Welcome NICOLE	EBALL: <u>Account Settinos I Contacta I Helo</u> I S
MyPortfolio	Sharing	Planning	Repor	ting R	ecognition		
TEST A	partments	S A 98104 Map I				Not eligible to apply for ENERGY STAR Certification	ENERGY STAR Score (1-100)
Portfolio Manager Procesty ID: 4278430 Year Built 1985						Current Score: 59	
/ Edit							Baseline Score: 45
					-		

### 2. Correct Property Details

- Under "Property Uses and Use Details" click the triangle next to the use name to show the GFA and other details.
- All "default" or temporary values need updating. (Hover over the blue text for definitions of each detail.)
- Click on the Action drop down menu and choose, "I want to... Correct Mistakes." DO NOT choose the other options..
- This will open the History Log, where you can fill in the correct values and uncheck any "temporary" values or defaults as shown in the example on the next page. IMPORTANT:
  - o DO NOT change the "Current As Of" date(s). If it is empty, use the year built:
  - o For Number of Residential Living Units, update the first value and then also update it relative to the numbers of stories in the building. EPA sets most buildings to 1-4 stories, so update it according to your building. If the building is of different heights, or if you are benchmarking multiple buildings as one, split the total unit number between the two heights.
  - o When corrected, un-check any places where "Use a default" or temporary values were checked.

Summary Details Energy	I Water Goals	Design				_
Basic Information	Property Uses and	Use Details Add Anothe	er Type of Use			٩d
Test property that is one single building Property GFA - Self-Reported: 32,000 Sq. Ft.	Name	Property	Property Use Type Gross Area		s Floor Action	
Occupancy: 95% Edit	Multifamily Housing	Use Multifamily	Value	100 ft <sup>2</sup> I war Current As Of	Iemporary Value?	/
	😭 Gross Floor Area		32000 ft²	01/01/1985	No	
Unique Identifiers (IDs)	Total Number of Resid	lential Living Units	38.4 (default value)	01/01/1985	No	
Portfolio Manager ID: 4278430	<ul> <li>Number of Residential Living Units in a Low-rise Setting (1-4 stories)</li> <li>Number of Residential Living Units in a Mid-rise Setting (5-9 stories)</li> </ul>		38.4 (default value)	01/01/1985	No	
Custom IDs: None Standard IDs: None			0 (default value)	01/01/1985	No	
You can select from Portfolio Manager's Standard Up to provide information to others	Number of Residentia High-rise Setting (10	Living Units in a pr more stories)	0 (default value)	01/01/1985	No	
in data requests. Or you can create up to three Custom IDs so that you can cross	* Number of Bedrooms		44.8 (default value)	01/01/1985	No	

His	tory Log for Multifamily Hous	sing Use			
Below used multi-	r is a record of any details you have provided for the to provide you with the most accurate metrics post building property (campus), you need to <u>update the</u>	nis Property Use. These values repressible for your property for any time penese Property Use Details in BOTH th	sent how your Pr riod. You can als te parent and chi	roperty Use has changed or so correct any errors you fin ild properties.	ver time and are d here. If you have a
Gross	s Floor Area				
	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/1980 🛗 (to present)	32000 Sq. Ft. 💌		Henry Ballinger	11/12/2014
X De	lete Selected Entries				
Total	Number of Residential Living Units				
	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/1980 🛗 (to present)	38.4 Use a default		Henry Ballinger	11/12/2014
X De	lete Selected Entries				
Numl	ber of Residential Living Units in a Low-ris	e Setting (1-4 stories)			
	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/1980 🛗 (to present)	38.4 ✓ Use a default		Henry Ballinger	11/12/2014
X De	lete Selected Entries				
Numl	ber of Residential Living Units in a Mid-rise	e Setting (5-9 stories)			
	Current As Of	Value	Temporary Value?	Revised By	Revised Date
	01/01/1980 🛗 (to present)	0 Use a default		Henry Ballinger	11/12/2014

NOTE: IF YOUR BUILDING HAS OTHER USE TYPES LISTED (FOR EXAMPLE, RETAIL OR RESTAURANT) USE THE SAME PROCESS TO CORRECT ANY DEFAULT VALUES. THE DETAILS REQUIRED WILL BE RELEVANT FOR THAT SPACE USE.

#### 3. Review Your Building's Score

- When completed, check the ENERGY STAR score (available for buildings with 20+ units).
  - o **Above 75** Congrats! Click the Apply for Energy Star Certification link.
  - o **Below or close to 75?** Contact your utility to take advantage of rebates.Visit: <u>www.seattle.gov/multifamily</u> or call 206-684-3800.