Rating & Reporting with Portfolio Manager

A Compliance Checklist for complying with the Building Performance Ordinance Rating and Reporting requirement using ENERGY STAR Portfolio Manager.

☐ Create a Portfolio Manager Account

Affected building owners must create a Portfolio Manager account prior to entering annual energy data. To register for a Portfolio Manager account, visit https://portfoliomanager.energystar.gov/pm/signup

☐ Add Your Building in Portfolio Manager

Once an account is created, owners can add the building to the account.
In "My Portfolio" click "Add a Property" and carefully read and follow the steps to add your building.

☐ Assign the Boulder Energy Reporting ID

Each building required to report energy performance under Boulder's Building Performance Ordinance has a unique ID, the **Boulder Energy Reporting ID**. Adding this ID to your building ensures the usage reported is attributed to the correct building during compliance checks.

To locate your **Boulder Energy Reporting ID**, find your building on the **Affected Building List** on the program website. Add the ID to your building in Portfolio Manager under 'Details' > 'Unique Identifiers' > 'Standard IDs.'

☐ Enter your Whole-Building Energy Data

Building owners must report calendar year (Jan 1 through Dec 31) whole-building energy data. This includes whole-building energy consumption of electricity, natural gas, solar, propane, etc.

Use Xcel Energy's Benchmarking Portal to set up automatic upload of aggregated whole-building energy data directly into your Portfolio Manager account **for the fuels which Xcel Energy provides you.** Manually enter in the Portfolio Manager 'Energy' tab all other energy data provided by other parties (such as Tiger Natural Gas).

☐ Run the Data Quality Checker

Once all energy data for the entire calendar year has been entered into Portfolio Manager, owners must run the Data Quality Checker under "Check for Possible Errors" on the Summary tab. Any red errors found related to energy use must be addressed before an energy report can be submitted.

☐ Submit your Data to the City of Boulder

To comply with the Building Performance Ordinance, you must manually submit your energy report to the city through Portfolio Manager every year. Click the required reporting link on the main webpage by selecting "Submit Data to City" in the Boulder Building Performance Resources link on the right sidebar.

Do you need further guidance with your rating and reporting?

➢ Review the **R&R How-to Guide** available at https://bouldercolorado.gov/sustainability/boulder-building-performance-rating-reporting

➢ Contact the **Boulder Building Performance Help Desk** at (844) 811-8785 or BPOHelpdesk@bouldercolorado.gov

➢ Review ENERGY STAR Portfolio Manager Resources
   o **ENERGY STAR Portfolio Manager Quick Start Guide:** http://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-quick-start-guide
   o **ENERGY STAR Help Desk:** https://portfoliomanager.zendesk.com/hc/en-us

➢ Get more information on the **Xcel Energy Benchmarking Portal** at www.xcelenergy.com/energybenchmarking

➢ For manufacturing buildings, access steps to submit using the **Energy Tracking Tool** at https://bouldercolorado.gov/sustainability/boulder-building-performance-rating-reporting

➢ Visit www.BoulderBuildingPerformance.com for more information.