



# How-to Guide for Medical and Recreational Marijuana Business License Energy Reporting and Carbon Offset Requirements

*Step-by-step compliance instructions for medical and recreational marijuana business owners to report their energy usage and carbon offsetting in Portfolio Manager.*

January 2016

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## Energy Reporting Checklist

- Collect complete energy use data for the last calendar year for your facility
- Create an account in EPA's ENERGY STAR Portfolio Manager tool
- Add your facility as a property to your Portfolio Manager account
- Add your Marijuana License Number to the property
- Enter all energy consumption data for the entire past calendar year
- Run the data quality checker
- Share your data with the City of Boulder

### **Program Administrator**

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## Introduction

[Medical marijuana](#) and [recreational marijuana](#) licensed facilities are required to report their energy usage to the City of Boulder and offset 100 percent of their electricity use. Revisions to the city of Boulder's licensing requirements in 2015 include clarified language and modifications to the following reporting requirements detailed in Boulder Municipal Code Ordinance No. 8081.

- Chapter 6-14-8 Requirements Related to Operation of Medical Marijuana Businesses; (i) Renewable Energy Usage Required
- Chapter 6-14-9, Right of Entry – Records to Be Maintained; (g) Reporting of Energy Use and Carbon Offset Purchases.
- Chapter 6-16-8 Requirements Related to Operation of Recreational Marijuana Businesses; (i) Renewable Energy Usage Required.
- Chapter 6-16-9, Right of Entry – Records to be Maintained; (g) Reporting of Energy Use and Carbon Offset Purchases.

### Report your energy use

**By May 1, 2016**, your facility must be set up as a property in ENERGY STAR Portfolio Manager (ESPM) and your facility energy use must be uploaded to the account. Your facility's energy use must be shared with the city through ESPM on a quarterly basis. However, once the facility is shared, you will not need to actively re-share the data each quarter unless you cancel the share.

### Offset your electricity use

Marijuana licensed facilities will have until **Aug. 1, 2016**, to comply with carbon offset requirement. A new carbon offset program is in the process of being approved. Upon program approval, the city will notify licensees on the appropriate steps to comply with this requirement. Stay tuned!

## Compliance Deadlines

The ordinance now requires all City of Boulder licensed marijuana facilities to provide the following information by the dates below:

1. **By May 1, 2016:** Proof of records confirming energy use (electricity and natural gas) by using the Environmental Protection Agency's (EPA) ENERGY STAR Portfolio Manager (ESPM) FREE online tool, and;
2. **By Aug. 1, 2016:** Proof of records showing how 100 (one hundred) percent of your facility's electricity use is offset by one or a combination of the following:
  - a. On-site installation of renewable energy,
  - b. Participation in a verified solar garden; and/or by
  - c. Purchasing offsets through a city-approved carbon offset program.

## Resources

For **FREE** assistance with or questions on reporting using Portfolio Manager, visit the ENERGY STAR Portfolio Manager [website](#) or contact a local PACE Business Sustainability Advisor at 303-786-7223 or [info@PACEpartners.com](mailto:info@PACEpartners.com).<sup>1</sup>

**For questions about these requirements, contact the Program Administrator or view the program [website](#).**

## Get Started

This user guide provides step-by-step instructions on how facility owners can comply with the annual reporting requirement of the ordinance using ENERGY STAR Portfolio Manager. Follow this guide's step-by-step instructions for setting up your ENERGY STAR Portfolio Manager account, populating buildings and energy use, and reporting to the City of Boulder.

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<sup>1</sup> [Partners for a Clean Environment](#) (PACE) provides FREE expert advisor services, financial incentives and a certification program to help businesses in the City of Boulder and Boulder County measure and gain recognition for their energy, waste, water, and transportation achievements.

## Step 1: Collect Facility Energy Usage Data

Energy usage data can include electricity, natural gas, steam, fuel oil, diesel, on-site solar or any other energy source. The data must cover consumption from January 1 through December 31 of the previous year, so you may need to access more than 12 months of utility bills to fully cover the year. You can collect this consumption data through your Xcel Energy account, natural gas supplier account, or from past bills. If you are the sole occupant of your building, see the box below on getting whole building data from Xcel.

**Note: If you are a tenant of a larger building and your energy use is not metered separately, please contact the city for guidance.**

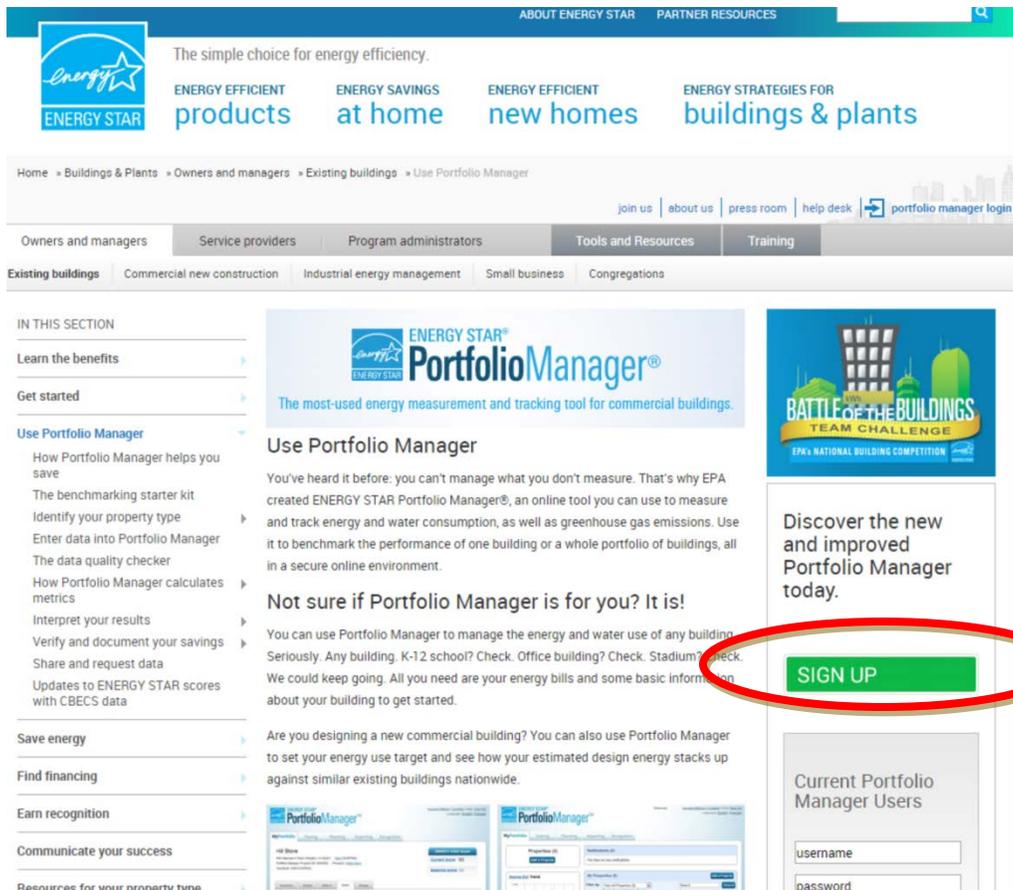
**Getting Whole Building Data from Xcel Energy.** In 2016, Xcel is in the process of developing a whole-building data access portal which will allow building owners to automatically receive aggregate energy consumption data imported directly in their ENERGY STAR Portfolio Manager (ESPM) account. The portal is still in the early stages of development, but should be launched in early 2016, and will be FREE.

While the portal is under construction, Xcel is offering a manual version of this service via an email request inbox at [benchmarking@xcelenergy.com](mailto:benchmarking@xcelenergy.com). Building owners submit a request including the address of the building, and Xcel works with the owner to determine which meters belong to the building, to group meters in a way that lines up with the way they've set up their ESPM account, and to obtain individual tenant consent (where required per data privacy rules). Xcel then returns an .xlsx file in a format which can be uploaded to ESPM.

## Step 2: Create an ENERGY STAR Portfolio Manager Account

If you already have an account with your facility and meters added, skip to Step 4: Enter your Boulder Energy Reporting ID.

1. Go to [www.energystar.gov/benchmark](http://www.energystar.gov/benchmark), click “Sign Up” and provide the required information.
  - a. Select “conventional units” when completing the sign up.
  - b. **Keep a record of your username and password** – it is not possible to change usernames and password recovery must go through the EPA.

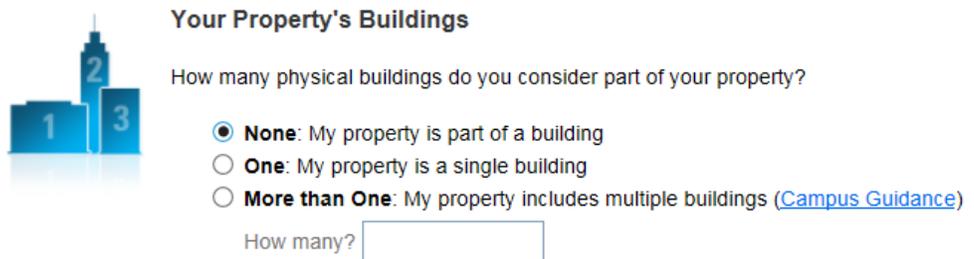


For additional guidance, see <http://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-quick-start-guide>

## Step 3: Add a Property

Once you have created an account, you can add your facility as a property to the tool.<sup>2</sup>

1. Click “Add a Property” on the top left of the page.
2. Select the requested property characteristics such as primary function and number of buildings and click “Get Started.”
  - a. When identifying the number of buildings keep the following in mind:
    - i. If you are one tenant in a multi-tenant building, select “**None**: My property is part of a building”
    - ii. If you are the only tenant/owner for an entire building, then select “**One**: My property is a single building”
    - iii. If you are located in a building whose electricity meter serves multiple buildings, select “**More than One**: My property includes multiple buildings” and view the [Campus Guidance](#).



**Your Property's Buildings**

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

**None**: My property is part of a building

**One**: My property is a single building

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

How many?

3. Provide the required property characteristics including name of property, address, year built, occupancy rate, and gross floor area.
  - a. Building data such as year built can be found at the [Boulder County Assessors Database](#).

**About Gross Floor Area.** GFA is the total property floor area, measured from the principal exterior surfaces of the building(s). Do **not** include parking.

4. Carefully read and click any applicable check boxes and then click “Continue.”
5. Review the **Basic Information** box and edit as needed.
  - a. Portfolio Manager does not have a space use type selection for a marijuana facility. Therefore, select “Other” use type for the property.
  - b. If your property has an average occupancy rate less than 10% over 12 months, see [FAQ 6. What if my building isn't fully occupied?](#)

<sup>2</sup> If you need to upload multiple properties to the tool, we recommend using the tool’s spreadsheet upload templates following the steps laid out on pages 3-4 of the guide: [How to Get Utility Data into Portfolio Manager](#).

**How to Account for Parking.** When parking is part of a building, it does not count towards gross floor area, since Portfolio Manager focuses on the energy use of the actual building interior. For example, if you have a building with 100,000 square feet of office space and 20,000 square feet of parking, you should enter a gross floor area of 100,000 square feet into Portfolio Manager. You may be prompted to enter information on parking area, but it will not count towards your gross floor area.

You have two options to receive an ENERGY STAR score for a property with an exterior parking lot or parking garage:

**Option 1. Sub-meter your parking and exclude its energy. (\*Recommended\*)**

- Do not enter a parking Property Use
- Do not enter the energy for your parking in Portfolio Manager
- If your parking garage **is physically connected** with your building and part of a single structure, then the **parking (fully or partially enclosed) cannot be more than 75% of the total property GFA**. For example, a property that is 100,000 square foot, with 80,000 sq ft Parking and 20,000 sq ft Office is considered a Parking Garage by EPA and cannot receive an accurate ENERGY STAR score or earn ENERGY STAR certification. This limit does not apply to Open Parking Lots.
- If your parking garage **is not physically connected** to your building, but rather is a separate structure then there is no limit as to its size. For questions on underground parking see FAQ 2. How do I report standalone parking garages?

**Option 2. Benchmark your parking and its energy use.**

- Add a **Property Use** for your parking.
  - Report the Gross Floor Area (GFA) of each type of parking (Fully Enclosed, Partially Enclosed, and Open)
- Include all parking energy in your energy meters.
- Regardless of physical connection, the GFA of your Parking (Fully Enclosed and Partially Enclosed) **cannot account for more than 50%** of your total Property GFA.

**Definitions.**

Open parking lots: Paved areas lit and used for parking vehicles.

Partially enclosed: Area of any parking structure that is not fully enclosed. Parking structures with partial or no walls.

Completely enclosed: Parking structure enclosed on all four side and has a roof (such as underground parking or a fully enclosed structure on first few floors of a building).

Review [this document](#) for more information on accounting for parking.

6. Once you have added the use type for the property, enter the use details including the gross floor area, operating hours, numbers of computers, etc.
  - a. More information about property types, definitions, and use details can be found [here](#).
7. **Important things to note:**
  - a. Hover the computer mouse over each property use characteristic for definitions.

- b. If you don't have all the information with you, select "Use a Default". You can change these numbers later, but the defaults work well for typical buildings and are accepted by the city for reporting.
  - i. Keep in mind, using default values will prevent you from getting an ENERGY STAR score if you are eligible for one, so be sure to update to actual values as soon as possible.
- c. The **Current As Of** date auto populates from the date the building was built. You should update this date to reflect the first date of reporting, for example, January 1, 2015, if use details have been consistent for the entire year. If use details change in the future, you should update the date to reflect when that change occurred. *For example, if the operating hours have been 60 hours per week all year, update the **Current As Of** date to January 1, 2015; but, if the number of computers increased July 1, 2015, you should update the **Current As Of** date for "Number of Computers" to reflect the date the computers were added (July 1, 2015).*

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 51000 <input type="text"/> Sq. Ft. ▾	1/1/2015 <input type="text"/> <b>C</b>	<input type="checkbox"/>
★ Weekly Operating Hours	60 <input type="text"/> <input type="checkbox"/> Use a default	1/1/2015 <input type="text"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift <b>a</b>	82 <input type="text"/> <input type="checkbox"/> Use a default	7/1/2015 <input type="text"/>	<input type="checkbox"/>
★ Nu... <input type="text"/>	<input type="text"/> <input type="checkbox"/> Use a default	7/1/2015 <input type="text"/>	<input type="checkbox"/>
★ Pe... <input type="text"/>	50 % or more ▾ <input type="checkbox"/> Use a default <b>b</b>	1/1/2015 <input type="text"/>	<input type="checkbox"/>
★ Pe... <input type="text"/>	50 % or more ▾ <input type="checkbox"/> Use a default	1/1/2015 <input type="text"/>	<input type="checkbox"/>

**Number of Workers on Main Shift**  
 The Number of Workers on Main Shift should reflect the total number of workers present during the primary shift. This is *not a total count* of workers, but rather a count of workers who are present at the same time. For example, if there are two daily eight hour shifts of 100 workers each, the Number of Workers on Mai... (Click to view the full term in the glossary)

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

[Back](#)

[Add Property](#) [Cancel](#)

8. When you have finished adding uses and details, click "Add Property".

**Making Changes?** To edit these use details later, click "Correct Mistakes" from the **Action** drop-down in the **Details** tab or see Page 18.

## Step 4: Assign your Marijuana Business License Number

Each licensed marijuana facility owner is required to report energy use and has a license number from the City of Boulder. **This business license number will be your Boulder Energy Reporting ID. Adding this ID to your property ensures the usage reported is attributed to the correct facility during compliance checks.**

1. Open the **Details** sub-tab for your property.
2. Click “edit” in the box **Unique Identifiers (IDs)** in the bottom left.

The screenshot displays the 'Details' tab of a property management system. On the left, the 'Unique Identifiers (IDs)' section is highlighted with a red arrow pointing to an 'Edit' button. This section includes fields for 'Portfolio Manager ID' (4570683), 'Custom IDs' (None), and 'Standard IDs' (None). A note explains that users can select from Portfolio Manager's Standard IDs or create up to three Custom IDs for cross-reference. In the center, the 'Property Uses and Use Details' table lists 'Building Use' (Office, 20,000 ft²) and 'Vacant office space' (Office, 5,000 ft²), with a total 'Property GFA (Buildings)' of 25,000. Below this is a 'Property GFA by Use' pie chart. On the right, the 'Property Type' section shows 'Office' as the self-selected type and 'Office' as the EPA-calculated type. A note indicates that EPA calculations use the Property Type as calculated by EPA.

3. On the page that opens, scroll to the bottom and find the box that says **Standard IDs**.
4. In the dropdown box, select **Boulder Energy Reporting ID**.
5. Enter your marijuana facility license ID number in the ID box to the right and then click “Save”.
6. You have now assigned your ID to your property in ESPM.

## Step 5: Enter Usage Data and Offsets for the Property

In the **MyPortfolio** tab, you will now see the dashboard for your property.

1. In the sub-tab **Meters**, click “Add Another Meter”.

Summary Details **Meters** Goals Design

Energy & Water Consumption  
**Manage/Enter My Bills**

Meters for Performance Metrics  
**Select Meters**

Energy Meters (0)  
[View as a Diagram](#) **Add Another Meter**

! There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. [Enter information about your energy meters](#) to begin tracking energy usage. After entering the meter, you will need to [choose to include it in your metrics](#).

For a step-by-step guide to entering meter data, see [How to get Utility Data into Portfolio Manager](#).

*“Meter” in Portfolio Manager simply represents a source of energy or water use. Therefore, if you have received whole building data from Xcel Energy or another supplier, you can create just one ‘meter’ to represent the building’s total electricity usage, for example.*

2. Check the applicable fuel types and number of meters for all meters at the property
  - a. If you purchase electricity, under Electricity select “purchased from the grid”
  - b. If you generate electricity onsite through solar panels or wind turbines, select the “generated onsite”

### 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 onsite with my own solar panels  
How Many Meters?

generated onsite with my own wind turbines  
How Many Meters?

3. Once all fuel types are selected, click “Get Started.”
4. Click anywhere in the first meter to enter the meter information.
  - a. **Date Meter became Active** will be the start date of the energy data you collected.
  - b. Carefully check the **units** of the data you are providing and select the correct unit from the drop down.

- c. Note: You can rename your meters in this table. If you are entering data for multiple meters, it is helpful to rename them according to your utility bill to make them easily accessible. For example, you can rename “Natural Gas #1” to your Xcel bill meter name “G-acct2951754/prem300731099/meter00000AB35807.” If you are the sole occupant of the building, you can rename the meter to “whole building electricity.”
- 5. Select “Create Meters.” Now you can enter the calendar year consumption data (*Note: Entering costs is not required*).
- 6. There are two options for entering data for all meter types, manually uploading data from monthly bills or uploading whole-building data in a spreadsheet format received from Xcel Energy or your natural gas provider. **Remember** – the data provided must cover the entire calendar year with no gaps. (Automatic energy use upload capabilities from Xcel are coming soon in 2016, stay tuned!)
  - a. If you are entering monthly data from bills, select “Click to add an entry.”
    - i. Keep in mind your end date for one billing cycle should not overlap with the start date for the next cycle. (i.e. If your January entry ends on 1/31/2015, your February entry should begin on 2/1/2015).
    - ii. Remember - You can also use the simple spreadsheet template to upload all of your meter data for the year rather than entering data directly into the table. Make sure you select the appropriate units.
  - b. If you have received whole-building data from Xcel Energy, you can upload the data by downloading the spreadsheet template from Portfolio Manager, populating the template with the data received, then selecting “Choose File,” selecting the data file on your local drive, and clicking “Upload.”

▼ Natural Gas [Edit](#)

Start Date	End Date	Usage therms	Cost (\$)	Estimation
<a href="#">Click to add an entry</a>				

- ✖ [Delete Selected Entries](#)
- + [Add Another Entry](#)
- [Learn how to copy/paste](#)

Upload data in bulk for this meter:

You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

- 7. Green Power for Electric Grid Meters
  - a. If you purchase green power from your utility or through renewable energy credits (RECs), you should check the box under **Green Power** for each month to report details on the purchase.

	Start Date	End Date	Usage MWh (million Watt-hours)	Cost (\$)	Estimation	Green Power
<input type="checkbox"/>	1/1/2015	1/31/2015	2,750		<input type="checkbox"/>	<input checked="" type="checkbox"/> <a href="#">Edit</a>

b. You can then click “Edit” under **Green Power** for each applicable month when purchases were made and provide the following:

- i. Quantity of green power in the units matching that of the energy use reported;
- ii. Fuel source and percent (i.e. 100% wind, or 50% biomass/50% hydro); and
- iii. Generation location by plant ID or eGRID subregion, if information is available.

Quantity: a \* 2,750 MWh (million Watt-hours) ! The quantity of green power must be entered in the same units as your energy usage for this time period.

Fuel Source(s):

- Biogas
- Biomass
- Geothermal
- Small Hydropower
- Solar
- Wind

b How Much? 100 %

Unknown

Generation Location: \*

- I know the specific plant where the energy was generated.
- I don't know the specific plant, but I know the eGRID Subregion (US) or Province (Canada) where the energy was generated.

c eGRID subregion (US) or Province (Canada): \* (RMPA) CO-Eastern WY ▾

I don't know anything about where the energy was generated.

**Save**

c. Once you have provided the green power details, click “Save.”

8. Onsite Renewable Meters

- a. If you generate onsite electricity or wind power, you must identify the energy amount you use onsite and the energy amount you export after generated, if any.
- b. You must also select the appropriate ownership of the RECs from the generated electricity from the drop down under **REC Ownership**. Note, You only see the benefits of green power in your metrics if you retain ownership of the RECs.

▼ Electric Solar Meter <a href="#">Edit</a> <span style="float: right;">✕ Delete Meter</span>						
	Start Date	End Date	Energy Used On Site MWh (million Watt-hours)	Energy Exported Offsite MWh (million Watt-hours)	Estimation	REC Ownership
<input type="checkbox"/>	01/01/2015	01/31/2015	350 <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">a</span>	0	<input type="checkbox"/>	<div style="border: 1px solid gray; padding: 2px;"> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">b</span> <ul style="list-style-type: none"> <li>Owned</li> <li>Arbitrage</li> <li>Sold</li> </ul> </div>

✕ Delete Selected Entries  
 + Add Another Entry  
 Learn how to copy/paste

9. After you have entered usage data for each month of the year for each meter, click “Continue.”
10. A new page will ask which meters of those you created should be included in the property’s total consumption.
  - a. Check the boxes for each meter for the property and select the option “these meters account for the total energy/water consumption for this property”.
  - b. Then click “Apply Selections”.
11. You will now see your property dashboard has updated with energy usage data.

## Step 6: Run the Data Quality Checker

The Data Quality Checker is a built-in tool in Portfolio Manager that runs a set of basic data checks to identify potential data entry errors. Common alerts include temporary values, default values, less than 12 months of data, etc.

1. On the property's **Summary** sub-tab, under **Check for Possible Data Errors**, select "Check for Possible Errors".

The screenshot shows the 'Summary' sub-tab of the Portfolio Manager interface. It includes a 'Metrics Summary' table and a 'Check for Possible Data Errors' section. A red arrow points to the 'Check for Possible Errors' button in the 'Check for Possible Data Errors' section.

Metric	Baseline (Dec 2015)	Current (Dec 2015)	Change
ENERGY STAR score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft <sup>2</sup> )	34,247.6	34,247.6	0.0(0.0%)
Site EUI (kBtu/ft <sup>2</sup> )	10,906.9	10,906.9	0.0(0.0%)
Energy Cost (\$)	118,099.99	118,099.99	0.00(0.0%)
Total GHG Emissions (Metric Tons CO <sub>2</sub> e)	22,109.2	22,109.2	0.0(0.0%)

**Check for Possible Data Errors**

Run a check for any 12-month time period to see if there are any possible errors found with your data.

[Check for Possible Errors](#)

2. Select the last day of the year you are rating, for example December 31, 2015, and click "Run Checker."
3. Review the list of alerts (if any) and Portfolio Manager's suggestions to address the issue(s).
  - o Common alerts include temporary or estimated values or less than 12 full calendar months of energy bills.
4. Following the links in the explanations, make corrections or updates to your property details to address as many alerts as possible. Temporary values (estimations) for energy data are acceptable, but you are required to fix any alert related to data covering less than 12 full months. Submittals to the city will be subject to a quality control review and will be rejected if data input errors are found. In that case, building owners will have thirty days to correct the errors and resubmit the data through Portfolio Manager.
5. Once you have made all applicable changes, re-run the checker to ensure that the alerts have been addressed.

## Step 7: Share your Data with the City of Boulder

When you have completed the steps above, you must share your property with the City of Boulder for compliance.

First, you must make sure you are connected with the City of Boulder’s ESPM account prior to sharing the data. Then, you must share your data through ESPM with the city account.

To connect with the city’s ESPM Account:

1. On the top right of your account, click “Contacts”



2. Select “Add Contact”

### My Contacts

Search for new contacts

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can “connect” to other Portfolio Manager users by searching for their accounts and sending a connection request.

		Share	Edit	Delete	Add Contact	Add Organization
All	Name			Organization		
T	<a href="#">TEST</a> Service and Product Provider/Consultant			<a href="#">TEST</a>		

3. Update the search by typing “City of Boulder” for **Organization**. Click “Search.”

#### Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:

Organization:

Username:

Email:

[Cancel](#)

4. In the search results, find “Kendra Tupper Energy Services Manager with City of Boulder” and click “Connect.” This will send a connection request to the city.

### Search Results

The results of your search are listed below. Clicking “Connect” will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

**Search**

Chris Douville Coordinator of Wastewater Treatment with City of Boulder	<b>Connect</b>
Dane Tomalin Not Available with City of Boulder - Office of Environmental Affairs	<b>Connect</b>
Kendra Tupper Energy Services Manager with City of Boulder	<b>Connect</b>
Vanessa Frambes Not Available with City of Boulder	<b>Connect</b>

Page 1 of 1 | 50 | 1 - 4 of 4

5. Once the city receives and accepts the connection request, the city will show up in your list of contacts under the **Sharing** tab. You will receive a notification in your Portfolio Manager account when the city accepts your connection request.

To share data with the city:

6. Once your connection request is accepted, you can share your data with the city. Click the **Sharing** tab on the main Portfolio Manager page and select “Share a Property.”

MyPortfolio **Sharing** Planning Reporting Recognition

My Shared Properties (0)

**Share (or Edit Access to) a Property**

**Download Sharing Report**

**Sharing Notifications (0)**

You have no new notifications.

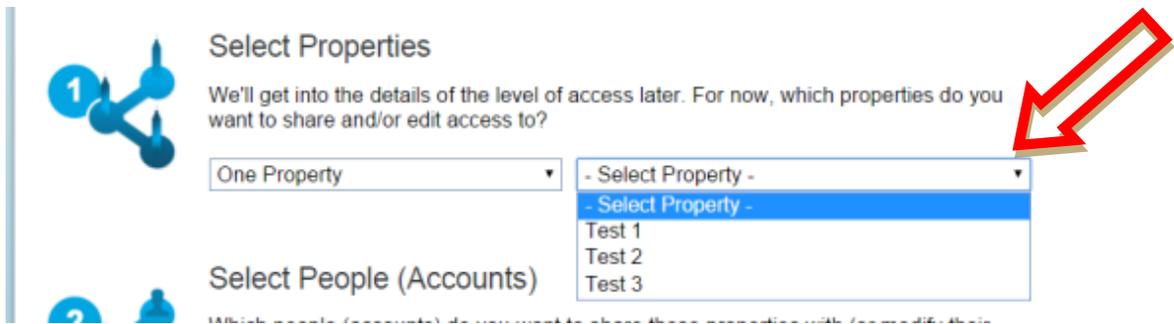
**More About Sharing**

No properties are currently shared between you and [your contacts](#). Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)

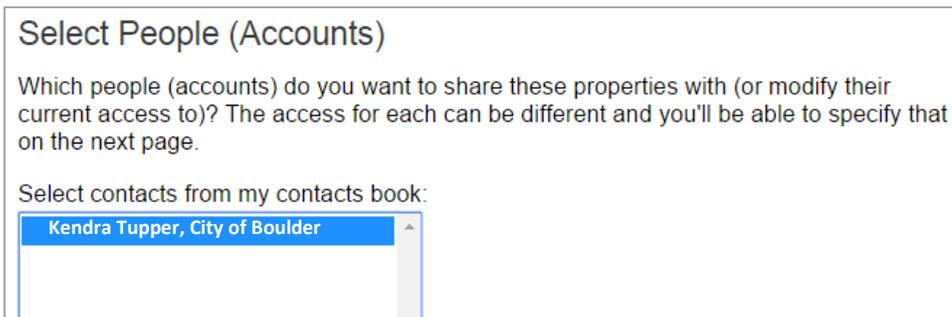
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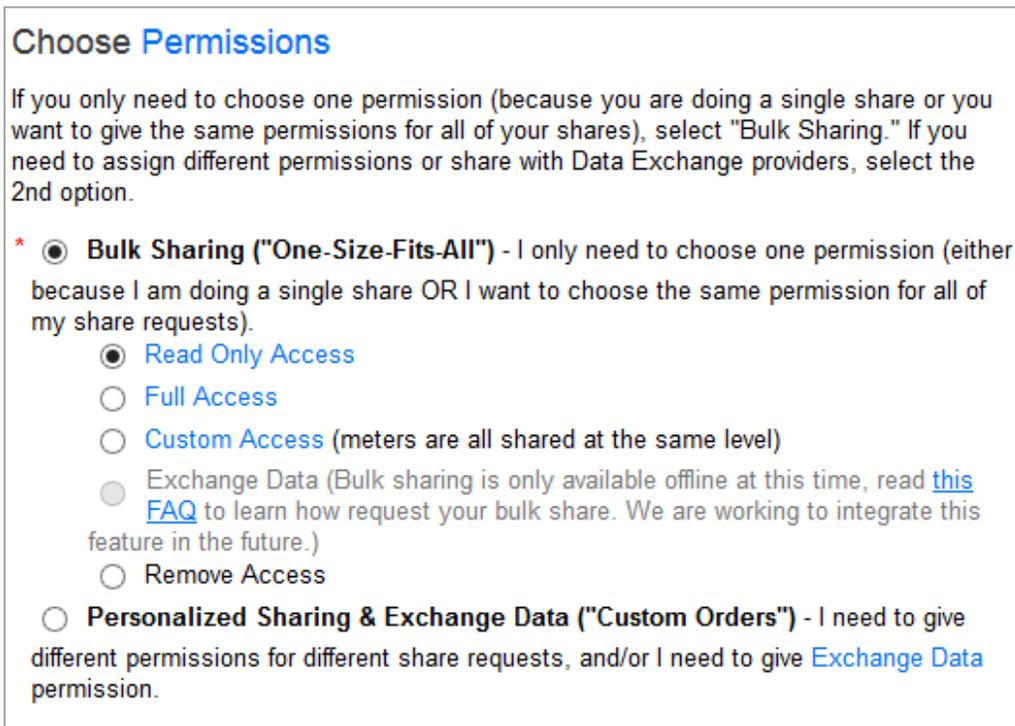
7. Select the number of properties for which you want to share energy data and then select the properties from the drop down.



8. Next, select the account you are going to share the data with. This will be the City of Boulder account, with the contact name Kendra Tupper, Energy Services Manager.



9. You must next choose the permissions you are granting for the data share. Because you will be sharing one property or multiple properties for the same purpose, select "Bulk Sharing." The city needs to be able to view all of the information, but does not need editing access. Therefore, select "Read Only Access" from the list.



10. Finally, click “Share Property(ies).”
  - After you share your property with the city, you will see notifications on both the **MyPortfolio** and **Sharing** tabs that your share request was sent. You will also receive notification that the city has accepted your share request.
  - Note – once a sharing request is issued and accepted, you will not need to issue a share request for each of the quarterly deadlines. However, if you cancel the share, you will need to re-submit a share request before the next quarterly deadline.

### **You have now completed the required reporting – thank you!**

**Errors or Updates?** If, after submitting your data to the city, you discover that any shared information is inaccurate or must be updated, you must make the appropriate changes to the property in Portfolio Manager, generate an updated response, and re-submit it to the city within 30 days of discovering the inaccuracy. Follow these instructions to update/correct shared information:

1. First, update or correct data by selecting the property in the Properties box in the **MyPortfolio** tab and selecting from the **Action** dropdown “Update Use Details” (If a change occurred in the building you want record of, such as additional square footage was added during a remodel) or “Correct Mistakes” (if you want to replace information reported previously that was incorrect).
2. After you save the changes, email the Program Administrator a narrative that describes the change that occurred, the original values and new values, and the reasoning for the change.

**Need Additional Guidance?** For questions on Portfolio Manager, or for guidance on other capabilities such as running reports to collect energy snapshots of your building, contact a local [Partners for a Clean Environment PACE](#) Business Sustainability Advisor by calling 303-786-7223 or emailing [info@PACEpartners.com](mailto:info@PACEpartners.com).

## Appendix A: Frequently Asked Questions

### 1. Which property uses should I select to represent my building?

Portfolio Manager has approximately 80 different property use categories but it does not have marijuana facilities. You should select “Other” when reporting on your marijuana facility. A list of definitions is available at:

[www.energystar.gov/buildings/sites/default/uploads/tools/PropertyUseDetailsandDefinition.pdf](http://www.energystar.gov/buildings/sites/default/uploads/tools/PropertyUseDetailsandDefinition.pdf)

### 2. How do I report standalone parking garages?

If you are reporting a standalone parking garage, EPA recommends that you select the “Other” building type when creating the building. Do not check off “My building’s energy use includes parking areas.” Instead, just enter the total area of the garage (i.e., including parking) as the area of the building. This will prevent any error messages from coming up as you continue.

The ENERGY STAR score provides an assessment of the building, not its parking area. If it is not possible to sub-meter your parking area, then Portfolio Manager will estimate the amount of energy parking uses and subtract that out before calculating your metrics. Learn more in the [technical reference for parking](#).

### 3. How is exterior site lighting reported (not parking)?

If site lighting (landscape, signage, safety lighting, etc) is on a different meter, the energy use from these areas should be included. Although you do not include these outdoor areas when calculating the Gross Floor Area (GFA) of a building in Portfolio Manager, you should include the energy use associated with these areas. The Portfolio Manager algorithms assume buildings of your type are expected to have outdoor usage, too. The GFA refers specifically to interior space. But the energy use evaluated in our algorithms should be all energy required to operate your building, which includes the energy used both inside and out.

3a. If it’s not separately metered, is there a way for folks to input how much 24/7 site lighting they have, and normalize for operation hours? No. Specific hours of operation for the site lighting aren’t an available input in Portfolio Manager.

### 4. I do not purchase my natural gas from Xcel. How do I get my natural gas consumption?

You will need to collect your natural gas bills and manually enter them into Portfolio Manager. Or, contact your natural gas supplier to determine the best method for collecting your monthly consumption for the calendar year.

### 5. How do I determine the gross floor area for a building or for a property use within the building?

Many building owners will have information on gross floor area from leasing, sale, or other transactional documents. Other buildings will have plans that can provide dimensions for the building and/or individual property uses. Boulder County’s tax assessor records may also have records of square footage in its [permit database](#), however those records are often organized by parcel or building section, while rating and reporting happens at the building level. In conjunction, the gross floor area of common

spaces and commercial condos can be estimated from building plans or measured; the City may also offer additional guidance, as needed, on measuring or estimating floor space.

The calculation of gross floor area is a one-time step, necessary only in the first year of reporting. Any estimation of floor area must be noted in "Property Notes." If the building square footage changes due to a physical change in the building such as a remodel, in Portfolio Manager go to the **Details** sub-tab for the property and under **Property Uses and Use Details**, select from the **Action** dropdown "Update with New Information." Then adjust the square footage and update the **Current As Of** date with the date the change took effect.

### 6. What if my building isn't fully occupied?

Report the percentage of the building that is occupied when you first create the building within Portfolio Manager. For office buildings with 10% or higher vacancy over 12 months, the vacant space must be input into Portfolio Manager separately from the occupied space as another use type with zero operating hours, computers, and workers. Follow these steps to add a vacant space to your property.

1. Select your property in Portfolio Manager and open the **Details** sub tab.
2. Under Property Uses and Use Details, from the dropdown select the type of use that the vacant area would be if occupied and click "Add."

The screenshot shows the 'Property Uses and Use Details' section of the Portfolio Manager interface. On the left, there is a 'Basic Information' sidebar with fields for Construction Status, Property GFA (Self-Reported: 25,000 Sq. Ft.), and Occupancy (85%). The main area contains a table with columns: Name, Primary Function, Gross Floor Area, and Action. A red arrow points to the 'Add Another Type of Use' dropdown menu at the top right of the table area.

Name	Primary Function	Gross Floor Area	Action
▶ Building Use	Office	25,000 ft <sup>2</sup>	I want to...

Property GFA (Buildings): 25,000 (used to calculate EUI)  
Property GFA (Buildings and Parking): 25,000

3. On the page that opens, provide details of this space.
  - a. Under name, identify the space as vacant.
  - b. Enter the vacant square footage.
  - c. Enter 0 for the operating hours, workers, and numbers of computers.
  - d. Select the percent heated and cooled for the conditioning occurring in the vacant space.

Name:  **a**

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area <b>b</b>	<input type="text" value="5000"/> Sq. Ft. ▼	1/1/1980	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text" value="0"/> <input type="checkbox"/> Use a default	1/1/1980	<input type="checkbox"/>
★ Number of Workers on Main Shift <b>c</b>	<input type="text" value="0"/> <input type="checkbox"/> Use a default	1/1/1980	<input type="checkbox"/>
★ Number of Computers	<input type="text" value="0"/> <input type="checkbox"/> Use a default	1/1/1980	<input type="checkbox"/>
★ Percent That Can Be Heated	50 % or more ▼ <input type="checkbox"/> Use a default	1/1/1980	<input type="checkbox"/>
★ Percent That Can Be Cooled <b>d</b>	50 % or more ▼ <input type="checkbox"/> Use a default	1/1/1980	<input type="checkbox"/>

4. Click “Save Use.”
5. Under Property Uses and Use Details, you should now have more than one space use and the applicable square footage for each use.
  - a. In some cases, the gross floor area for these uses may now sum to more than the building square footage. There will be an alert “!” next to the Property GFA if this is the case.

Summary **! Details** **! Meters** Goals Design

**Basic Information**

Construction Status:  
This property matches the single building

**! Property GFA - Self-Reported:**  
25,000 Sq. Ft.

Occupancy:  
85%

[Edit](#)

**Property Uses and Use Details**

[View as Diagram](#)  [Add](#)

Name	Primary Function	Gross Floor Area	Action
▶ Building Use	Office	25,000 ft²	I want to... I want to... Update with New Information View Update History
▶ Vacant office space	Office	5,000 ft²	<b>! Property GFA (Buildings): 30,000 (used to</b> <b>Correct Mistakes</b> Delete use

Property GFA (Buildings and Parking) 30,000

- b. In this case, you must select the original property use in the list that currently represents the whole building square footage, and update the square footage to be less than the vacant space.
      - i. From the **Action** drop down for the original use, select “Correct Mistakes.”
      - ii. In the new window, under **Gross Floor Area**, in the column **Value**, update the square footage.
      - iii. Click “Save Corrections”.
      - iv. The property GFA should now match.

The screenshot displays a web interface with two main sections. On the left, the 'Basic Information' section includes 'Construction Status: Test property that is one single building', 'Property GFA - Self-Reported: 25,000 Sq. Ft.', and 'Occupancy: 85%'. On the right, the 'Property Uses and Use Details' section features a table with columns for Name, Primary Function, Gross Floor Area, and Action. The table lists 'Building Use' (Office, 20,000 ft²) and 'Vacant office space' (Office, 5,000 ft²). Below the table, a summary row shows 'Property GFA (Buildings): 25,000 (used to calculate EUI)'. Red circles highlight the 'Property GFA - Self-Reported' value and the summary row.

Name	Primary Function	Gross Floor Area	Action
▶ Building Use	Office	20,000 ft²	I want to...
▶ Vacant office space	Office	5,000 ft²	I want to...
Property GFA (Buildings):		25,000	(used to calculate EUI)

7. Are there any energy uses that are not part of my building’s energy use?

Cell phone towers, radio masts, and any external billboards used for leased advertising space are not part of building energy use, and may be excluded if submetered. If you are not using whole-building data, and are submetering your parking areas, you may exclude parking area energy use since parking doesn’t count towards your gross floor area.

8. What if there is split ownership of the building?

The primary owner listed in the Boulder County Tax Assessor records is responsible for compliance with all aspects of the ordinance. Please refer to the **Affected Building List** on the program [website](#) to see the primary owner assigned to each building.

9. What is Source EUI? What is an ENERGY STAR score? How are they calculated?

Energy use intensity (EUI) is the building’s energy use per square foot. Source energy accounts for all the energy used in delivering energy to a building, including power generation and transmission and distribution losses. Site energy is the amount of energy consumed by a building as reflected in utility bills. Portfolio Manager typically shows a building’s Source EUI, which is a complete assessment of the fuel required for operating the building. When you see Weather Normalized Source EUI, this is an estimate of what the Source EUI would have been in a year with “normal” weather conditions. For example, in a very hot year, Portfolio Manager might estimate your Weather Normalized Source EUI to be lower than your actual Source EUI. This allows an owner to more accurately compare a building’s efficiency from year to year.

The ENERGY STAR score is a percentile score, on a scale of 1-100, comparing your building’s energy performance with that of similar buildings in the U.S. The score normalizes for climate, weather, building size, number of employees, and other operational factors. A score close to 100 indicates the most energy efficient building. A score of 75 or above qualifies a building for [ENERGY STAR Certification](#).

10. What if my building doesn’t receive an ENERGY STAR score?

Only some building types will receive an ENERGY STAR score, due to limitations in the national comparative dataset. Thus, many buildings will submit their energy reports to the City without an ENERGY STAR score. The following building types are eligible for a score:

- [Bank branch](#)

- Barracks
- Courthouse
- Data center
- Distribution center
- Financial office
- Hospital (general medical & surgical)
- Hotel
- K-12 school
- Medical office
- Multifamily housing
- Non-refrigerated warehouse
- Office
- Refrigerated warehouse
- Residence hall/ dormitory
- Retail store
- Senior care community
- Supermarket/grocery store
- Wastewater treatment plant
- Wholesale club/supercenter
- Worship facility

If your building type is on the list and you still didn't receive a score, there may be an error in your data or submission. Contact a local PACE Business Sustainability Advisor for free assistance by calling 303-786-7223 or emailing [info@PACEpartners.com](mailto:info@PACEpartners.com).

#### 11. How are data centers scored in ENERGY STAR Portfolio Manager?

Portfolio Manager defines a data center as a space “specifically designed and equipped to meet the needs of high density computing equipment such as server racks.” You can add a data center as a property use type. To receive an ENERGY STAR score for a data center, IT energy use must be measured at the output of the uninterruptible power supply.

#### 12. Can I use data from an energy or building management system?

Yes, if the system provides accurate whole-building data. Many such systems can upload energy data directly into Portfolio Manager. You must note in “Property Notes” if you do not use utility-provided data, and an explanation of any difference.

#### 13. What if I generate electricity through on-site solar panels?

Onsite green power is not subject to traditional generation, transmission, and distribution losses. As long as you retain the Renewable Energy Credits (RECs), this benefit is reflected in the ENERGY STAR score and Source EUI by assigning onsite electricity a source conversion factor of 1.0 rather than the 3.34 value that is used for grid-sourced electricity. As such, a property with onsite solar or wind power is likely to receive a higher score. The electricity use from onsite solar and wind must be reported and included in your total energy consumption and ENERGY STAR score calculation. The use of onsite

renewable electricity is part of your overall site energy consumption (i.e. the energy requirement of your property).

You can enter this into Portfolio Manager when setting up your meters. Obtain data from your installer on the energy used, any energy exported out to the grid, and about any renewable energy certificates generated. If you report your renewable energy generation and use accurately, it will be reflected in your building's greenhouse gas emissions. For additional details on green power, [see this document](#).

#### 14. What if the building is under construction or newly built?

A newly constructed marijuana facility will be required to share data following the first full quarter of the year where complete data is available. For example, if the building certificate of occupancy begins March 1, 2016, the facility will be required to share data for the calendar year's second quarter, with a deadline of June 30, 2016.

#### 15. What if I purchased the building in the past year?

Buildings that have transferred ownership are not exempt from reporting requirements. The reporting regulations require the seller to transfer to the new owner any information that has been collected for completing the energy report.

#### 16. What can I do to make my building more efficient?

ENERGY STAR offers a wealth of resources to improve building efficiency including [financial calculators](#) to evaluate energy efficiency measures, the [Guidelines for Strategic Energy Management](#), and [the Building Upgrade Manual](#).

Partners for a Clean Environment (PACE) provides free expert advisor services, financial incentives and a certification program to help businesses measure and gain recognition for their energy, waste, water, and transportation achievements. For free assistance, contact a PACE Business Sustainability Advisor\* at 303-786-7223 or [info@PACEpartners.com](mailto:info@PACEpartners.com).

*\*Provided by Boulder County and the City of Boulder Climate Action Plan (CAP) tax dollars supporting businesses and building owners in achieving their energy efficiency goals.*

**Not finding your question?** Visit ENERGY STAR FAQs [here](#) or contact a local PACE Business Sustainability Advisor by calling 303-786-7223 or emailing [info@PACEpartners.com](mailto:info@PACEpartners.com).