



How to Submit Energy Performance Metrics: Frequently Asked Questions (FAQs)

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Q1. What are Energy Performance Metrics?

Energy Performance Metrics (EPMs) are metrics used to track energy and water over time to demonstrate how they impact a multifamily property's bottom line. The metrics are:

- Property ID: A unique property identifier generated by ENERGY STAR® Portfolio Manager®.
- Year Ending Date: The year and month of the last twelve calendar months. Represents the timeframe for the ENERGY STAR Score and the Source EUI. Expressed as 12/2017.
- ENERGY STAR Score: A 1 to 100 score created by ENERGY STAR Portfolio Manager that summarizes the energy performance of a multifamily property.
- Source Energy Use Intensity (EUI): A metric representing the annual energy used at a property per square foot (kBtu/ft²).
- EPA Water Score: A 1 to 100 score created by ENERGY STAR Portfolio Manager that summarizes the water performance of a multifamily property.
- Water Use Intensity: A metric representing the annual water used at a property per square foot (gal/ft²).

Q2. What is ENERGY STAR® Portfolio Manager®?

ENERGY STAR Portfolio Manager is a secure online tool used to measure and track energy and water consumption and costs, as well as greenhouse emissions. Using this tool allows users to benchmark property and/or portfolio performance while implementing every step of your energy management program, from setting a baseline to identifying goals and tracking improvements. This tool can also gain you recognition from EPA for your efforts.

ENERGY STAR Portfolio Manager can be accessed at www.energystar.gov/portfoliomanager.

Additional help can be found in the [2018 How To for Borrowers – Submit Energy Performance Metrics](#).

Q3. Who must submit EPMs to Fannie Mae?

You are required to submit 2017 EPMs to Fannie Mae in 2018 if your property is either:

1. Financed as a Green Rewards Mortgage Loan or a Green Preservation Plus Mortgage Loan, or the Property has a Fannie-Mae recognized Green Building Certification;
- or*
2. Required to benchmark by local law in one of the cities listed on Fannie Mae's [website](#).

Q4. What is the deadline to submit EPMs to Fannie Mae? Is the deadline the same as the city's deadline?

Your loan's Servicer will set the deadline to submit the EPMs to Fannie Mae. The city's deadline may be after the Servicer's deadline.

Q5. How do I generate the Fannie Mae EPM Report?

See detailed instructions in the [2018 How To for Borrowers – Submit Energy Performance Metrics](#).



Q6. What data do I need to create an EPM report?

1. **Basic property details** about your property’s type and usage.

NOTE: To generate an EPA Water Score, you **MUST** enter a value for Irrigated Area.

2. **Energy consumption and cost data** for the entire property between January 1 and December 31, 2017.
3. **Water consumption and cost data** for the entire property between January 1 and December 31, 2017.

NOTE: “Entire property” consumption represents all meters serving common areas and tenant areas, regardless of whether the owner or tenant pays the utility bill.

Q7. How can I get entire property consumption data if my tenants pay some or all of their own utility bills?

Find out if your utility will provide whole building consumption data: Contact your utility or check [EPA’s Interactive Map](#) or [Full List](#) of utilities that provide benchmarking data. If your city requires benchmarking, your utility is likely to provide this service.

If your utility does not provide whole building data, you will need to first sample your tenants’ consumption, then submit your EPMS using estimated tenant consumption.

1. Contact your utility or follow instructions provided on their website to obtain a Letter of Authorization (LOA) to release tenant data. Your utility may provide you with a LOA to use, or you may use your own. See Appendix for a sample LOA.
2. Ask tenants to complete the LOA in order to receive an adequate sample of tenant data. Determine the minimum number of apartment units to sample according to the total number of units as recommended in the following table. Choose a sample of units that is representative of the unit mix at the property (e.g. 75% 1-bedrooms, 25% 2-bedrooms). Collect more LOAs than you need to reach the minimum in case the utility cannot provide data for every requested account. Submit these LOAs to your utility to receive tenant consumption data.

Table 1. Recommended Tenant Sample Rates.

Number of Units	Minimum Number of Units in Sample
5-9	2
10-19	3
20-29	4
30-49	5
50-74	6
75-99	7
100-149	8
150-200	9
>200	10

3. Scale up the sampled consumption to estimate tenant consumption for the entire property. For each month, calculate the scaled-up consumption according to the following equation.

$$All\ tenant\ consumption = Total\ sampled\ consumption \times \frac{Number\ of\ apartment\ units\ in\ property}{Number\ of\ sampled\ units}$$



4. Add this data along with owner consumption data to Portfolio Manager to complete your entire property's consumption. Indicate all meter entries that have been estimated from a sample by selecting the "Estimated" checkbox next to each entry.

Q8. How do I find out the irrigated area of my property?

See the EPA's one-pager on [Irrigated Area and Water Use Tracking in Portfolio Manager](#), where you can find a detailed definition of irrigated area and suggested methods for determining this value.

Q9. How do I submit the report to my Servicer?

See detailed instructions in the 2018 [How To for Borrowers: Submit Energy Performance Metrics](#). Go to Fannie Mae's [website](#) for the latest *How To* document.

To submit via e-mail: Forward the e-mail you receive from ENERGY STAR Portfolio Manager to your Servicer with the Excel attachment.

To submit a printed hard copy: Open the Excel spreadsheet from the e-mail and print the following six values to send to your Servicer:

- Property ID;
- Year Ending Date;
- ENERGY STAR Score;
- Source EUI (kBtu/ft²);
- EPA Water Score; and
- Water Use Intensity (gal/ft²).

Q10. What if I have multiple properties with one Servicer?

When using Portfolio Manager, you have the option to select all properties with the Servicer to be included in a single EPM report.

Q11. What if I have multiple properties with different Servicers?

When using Portfolio Manager, generate a separate EPM report for each Servicer.

Q12. Can I use a third-party vendor to assist with data collection and submission?

Yes. Several qualified firms specialize in utility data collection, submission to Portfolio Manager and compliance with local laws. Share these instructions with your vendor to be sure they can help you with Fannie Mae's submission as well.

Q13. What if I have other questions about complying with my city's laws or reporting to Fannie Mae?

For questions about reporting to your city, consult your city's website or benchmarking information hotline. Go to Fannie Mae's [website](#) for links to cities' websites. For questions about reporting to Fannie Mae, please email mf_operatingstatements@fanniemae.com.



Appendix

Sample Letter of Authorization

The following sample Letter of Authorization (LOA) may be used to request tenant utility data from your utility provider(s).

1. Replace all the red text with text applicable to your property. This text identifies the utility provider(s) addressed, your property name, and the individuals representing your property who are responsible for receiving the tenant data. Your representatives may include a property management company and/or a third-party vendor assisting you with utility data collection and submission.
2. Distribute the LOA to tenants for whom you wish to receive utility data. Ask them to complete the form, and collect the completed LOAs.
3. Submit the completed LOAs to your utility provider(s), following any additional instructions provided by the utility provider(s).

TENANT RELEASE AUTHORIZATION FORM FOR UTILITY BILL HISTORIES

PROPERTY NAME & ADDRESS

I, _____ (please print name), hereby request that **UTILITY COMPANY NAME(S)** grant complete access to my utility bill and energy use history including meter read dates, actual consumption per bill, and a detailed list of charges per bill to **PROPERTY MANAGEMENT COMPANY, PROPERTY OWNER, and OTHER RESPONSIBLE REPRESENTATIVE**. Authorization includes, but is not limited to, access to hard copy bill copies, billing summaries, electronic and/or online bill copies or billing summaries. Authorization will allow **PROPERTY MANAGEMENT COMPANY, PROPERTY OWNER, and OTHER RESPONSIBLE REPRESENTATIVE** to submit detailed utility bill consumption to third party entities. This authorization is valid for as long as the signee is a tenant of **PROPERTY NAME**.

The undersigned requests that **UTILITY COMPANY NAME(S)** fax or mail my utility bill history including all of the following to:

Attn: **CONTACT NAME**
CONTACT ADDRESS
Fax: **(###) ### - ####**

- Meter read dates per billing period
- Actual consumption per billing period
- Actual charges per billing period

Please fill out this form completely and accurately

Name of Account Holder: _____

Address and Apartment Number: _____

Electric Account Number: _____

Gas Account Number: _____

Signature of Account Holder: _____

Date: _____