

## Energy Reporting Checklist

The checklist below provides an overview of how to report building energy and water use to the City of Boston; a detailed how-to guide, with screenshots, tips, and FAQs, is available at [www.boston.gov/environmentalandenergy/conservation/BERDO.asp](http://www.boston.gov/environmentalandenergy/conservation/BERDO.asp).

As long as the data are complete before submitting, the order in which you complete these steps is flexible.

- 1** Collect data on water use and all types of energy used by the building, for calendar year 2013. This may include electricity, natural gas, steam, chilled water, fuel oil, or any other energy sources. You can obtain whole-building energy data from your utility, if needed.
- 2** Create an account in EPA's Portfolio Manager, a free, online energy tracking tool. Go to <http://portfoliomanager.energystar.gov/>.
- 3** Add your property, and enter information on building characteristics. Remember that gross floor area, as defined in Portfolio Manager, may differ from the area listed in the Assessing Records. (Details on what to include and exclude is in the How-To Guide).
- 4** Enter the size and details of the property uses within your building. If you don't have any of this information, you may need to request it from your tenants.
- 5** Set up your energy and water meters in Portfolio Manager, with the correct units. If you have whole-building data, you only need to set up one electricity meter, for example, to represent total electricity consumption.
- 6** Enter your energy and water use data. If you've received whole-building data from NSTAR, National Grid, or Veolia, the data is in a format that can be copied into Portfolio Manager.
- 7** In the "Property Notes" box in Portfolio Manager, enter any contextual information about your building's energy performance that you wish to be included in disclosures (though there will not be building-specific disclosure this year). You also need to note any use of default or estimated values, or delegation of reporting – see the how-to guide for details.
- 8** Add your Boston Assessing Parcel ID, under "Unique Identifiers."
- 9** Create your energy and water report. Import the template into your account by going to the Boston-specific Portfolio Manager link (available mid-February on our website), and generate the report. Preview your report, and then click "Send Response" to submit it.
- 10** Retain the confirmation email that you will receive, as well as other records related to the energy reporting process.

You can find additional forms and guides, such as for requesting tenant data or applying for an extension, and other information that may be useful at [www.boston.gov/environmentalandenergy/conservation/BERDO.asp](http://www.boston.gov/environmentalandenergy/conservation/BERDO.asp). If you have other questions, please contact us at [energyreporting@boston.gov](mailto:energyreporting@boston.gov).