

# Step-by-Step Guide: Submitting Utility Data for the 2023 Multifamily Energy and Water Survey

## Step-by-Step Guide

Thank you for sharing your multifamily property information for the [2023 Multifamily Energy and Water Survey](#). The information submitted in this survey will be anonymized and delivered to the U.S. Environmental Protection Agency (EPA) solely to update the ENERGY STAR® Score and EPA Water Score for multifamily housing. An anonymized data set and report on multifamily energy and water consumption summary statistics will also be shared publicly and posted on Fannie Mae's website. The multifamily industry can leverage these survey results for further research. See [here](#) for more information and to see a summary of the 2012 Multifamily Energy and Water Survey results.. This survey is endorsed by Commercial Real Estate Finance Council (CREFC), Enterprise Community Partners, Mortgage Bankers Association (MBA), National Apartment Association (NAA), National Council of State Housing Agencies (NCSHA), National Multifamily Housing Council (NMHC), NeighborWorks America, Stewards of Affordable Housing for the Future (SAHF), and the Urban Land Institute (ULI) with support from Fannie Mae. Bright Power has been engaged to manage and administer the survey.

**Only submissions with whole-building utility data can be included in the analysis.** This includes all energy and water data used either by management or by tenants. This document will show how to obtain tenant data for:

- **Properties that are master metered; and**
- **Properties where tenants pay directly for some or all utilities.**

Multifamily building utility accounts are set up in many different ways, and each utility company has its own data access process. The steps to accessing your building's utility data will depend on the utility account setup and your utility providers.

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**Step 1: Gather information about your utility companies and metering setup**

**Step 2: Access your whole-building data**

**Step 3: Appendix: Utility providers who do not provide data**

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# Step-by-Step Guide

## Step 1: Gather information about your building's utility companies and metering setup

### A. Identify your utility providers

#### Electric

Name/login page of the utility provider

#### Water

Name/login page of the utility provider

#### Gas

Name/login page of the utility provider

### B. Identify which fuel type is used for in-unit cooling, heating, and hot water

#### Cooling

- Electricity
- Gas
- Propane

#### Heating

- Electricity
- Gas
- Oil
- Propane
- Steam

#### Hot Water

- Electricity
- Gas
- Oil
- Propane
- Steam

### C. Confirm the payer and utility billing scenario details

**Identify who pays the utility company** for in-unit electricity, cooling, heating, hot water, and water/sewer. A utility is tenant-paid if residents set up accounts with the utility provider directly.

**Often the owner pays the utility and bills tenants back** in some way (e.g. flat fee, submetering, RUBS). If applicable, confirm the billback method and the fee or percent billed back.

*For each utility type, identify who pays and fill in details for relevant blanks.*

#### In-Unit Electricity

- Owner
- Owner pays and bills back to tenant
- Tenant

#### In-Unit Heating

- Owner
- Owner pays and bills back to tenant
- Tenant

#### In-Unit Water/Sewer

- Owner
- Owner pays and bills back to tenant
- Tenant

#### In-Unit Cooling

- Owner
- Owner pays and bills back to tenant
- Tenant

#### In-Unit Hot Water

- Owner
- Owner pays and bills back to tenant
- Tenant

If you identified that all your utility types are paid by “owner” or “owner pays and bills back to tenant,” your building is master-metered. You will be able to access whole-building data, no matter your utility company.

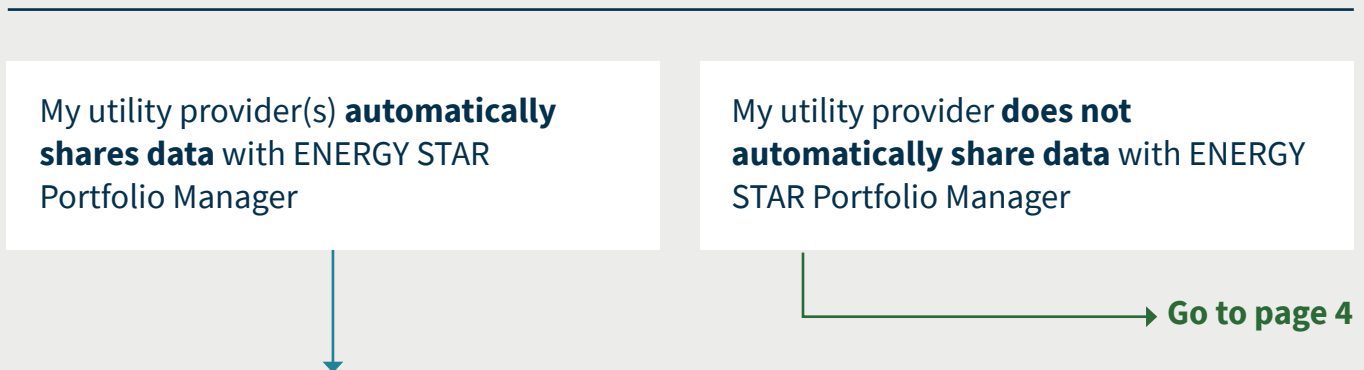
If you selected “tenant” for some options, your building has mixed metering. The ease of accessing utility data will vary by utility company. Many utility companies automatically share whole-building data, including tenant-paid data, with ENERGY STAR Portfolio Manager® or provide aggregated whole-building data to building owners.

# Step-by-Step Guide

## Step 2: Access your whole building data

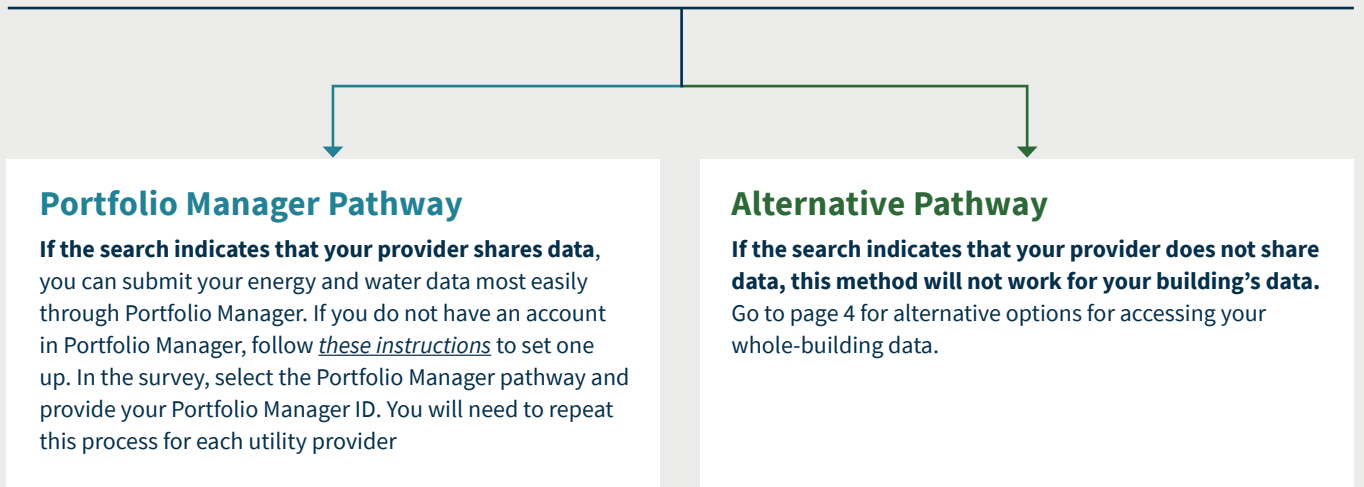
**Property owners must submit whole-building data to complete the survey.** Submitted utility data must cover a minimum of 12 consecutive months of energy and water consumption data for the entire period of January 1, 2022 through December 31, 2022. Due to billing cycles, this will likely require bills covering 13 months, extending to part of the prior month (December 2021) and/or the subsequent month (January 2023).

**There are many ways to access the whole-building utility data.** Below are the most common ways to access your data based on your utility provider(s) and utility billing structure.



### A. Recommended, if available

Some utility providers have the ability to automatically share your whole-building data via ENERGY STAR Portfolio Manager. Go to the [ESTAR provider search tool](#) to see if your utility provider automatically shares data with ENERGY STAR Portfolio Manager. Enter your zip code.



#### Portfolio Manager Pathway

**If the search indicates that your provider shares data,** you can submit your energy and water data most easily through Portfolio Manager. If you do not have an account in Portfolio Manager, follow [these instructions](#) to set one up. In the survey, select the Portfolio Manager pathway and provide your Portfolio Manager ID. You will need to repeat this process for each utility provider

#### Alternative Pathway

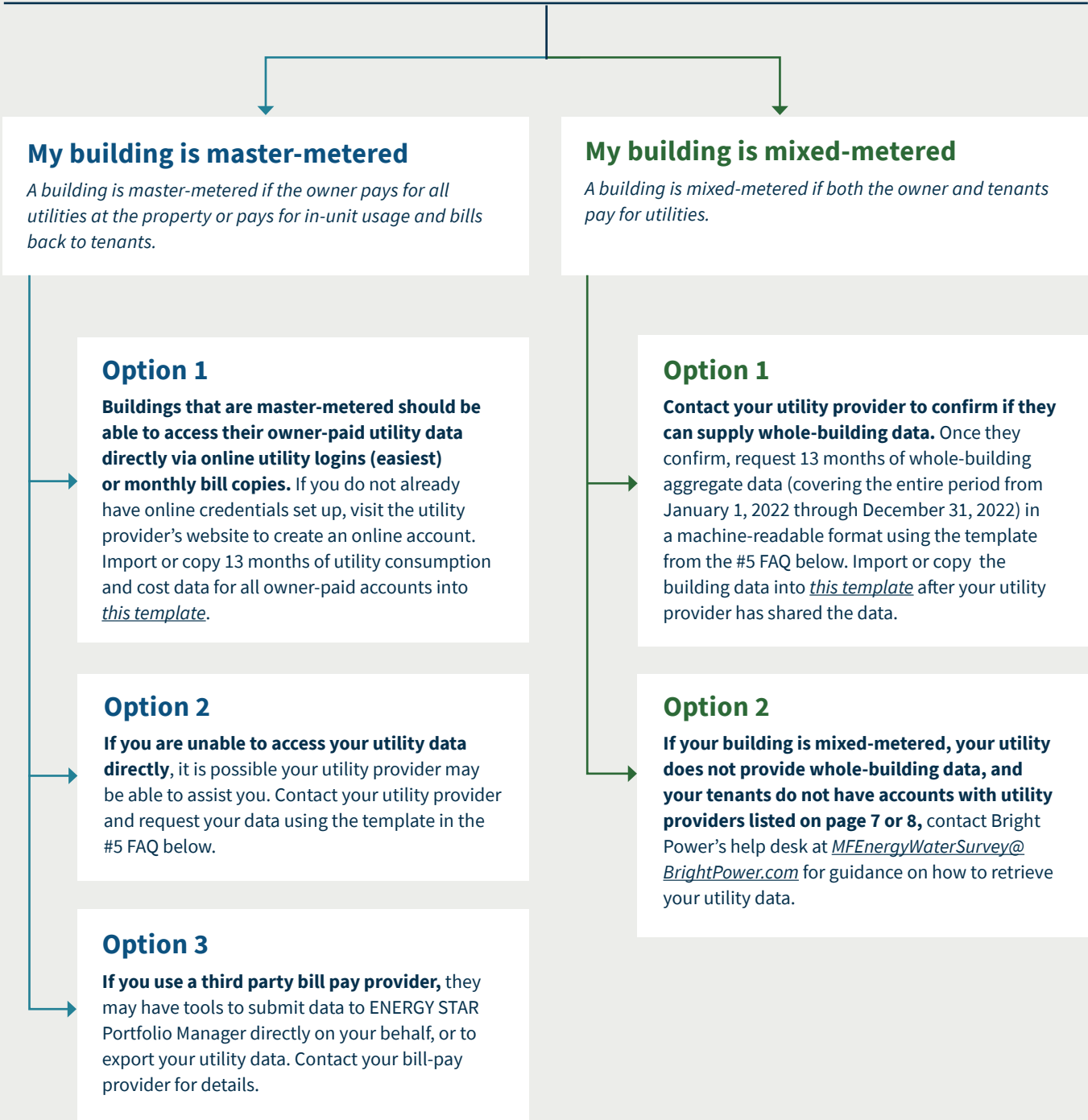
**If the search indicates that your provider does not share data, this method will not work for your building's data.** Go to page 4 for alternative options for accessing your whole-building data.

# Step-by-Step Guide

## Step 2: Access your whole building data *(continued)*

### B. Alternative

My utility provider **does not automatically share data** with ENERGY STAR Portfolio Manager



# Step-by-Step Guide

## Step 3: Submit your whole-building data in one of two ways

### A. Option 1

Using ENERGY STAR Portfolio Manager

- a. If your property has mixed-metering, confirm that your Portfolio Manager account includes a whole-building data for energy and water for the entire period of January 1, 2022 through December 31, 2022. This will typically require bills for 13 months, extending to part of the prior month (December 2021) and the subsequent month (January 2023).
- b. Details on how to upload tenant data can be found [here](#).
- c. Provide your Portfolio Manager ID when prompted in [the survey](#).

### B. Option 2

Using an Excel template, populated with data from your utility provider or third party bill pay provider

- a. Confirm that the data you have received includes a minimum of 12 consecutive months for energy and water consumption for the entire period of January 1, 2022 through December 31, 2022. This will typically require bills for 13 months, extending to part of the prior month (December 2021) and the subsequent month (January 2023).
- b. **Download [this template](#)**. Import or enter energy and water use and cost for at least January 1, 2022 through December 31, 2022.
- c. Submit the template when prompted during the survey.



# Step-by-Step Guide

## Frequently Asked Questions

### 1. How will this data be used?

All survey responses will be held in strict confidentiality. Identifying information will be removed from the data and no property, financial, owner, or resident information will be included in the survey data or results. No building-identifying information will be made available for any commercial or business intelligence purposes; an anonymized building data set will be shared with U.S. EPA solely for purposes related to the Multifamily Energy and Water Survey. This anonymized data set will later be shared on Fannie Mae's website for public use in conjunction with the updated ENERGY STAR Score for Multifamily Housing launch, anticipated in Q4 2024.

### 2. What information will I need to submit a data request to my utility provider?

- Building & Property Addresses;
- Meter numbers;
- Account numbers; and
- Tax ID or other proof of building ownership.

### 3. Where can I find these details?

**Account & Meter numbers:** On your utility bills or online utility account.

### 4. What are common mistakes to avoid when submitting a utility data access request?

Double check the dates, utility company, fuel, and account information before submitting a utility data request.

### 5. What should I write in my aggregate utility data request email?

**Subject line:** Whole-Building Utility Data Request

Hello,

I am writing to request whole-building aggregate [Utility Type] data for [Property Name] located at [Property Address, City, State, Zip].

I need month-by-month usage & cost data across all accounts at the property from December 2021 through January 2023. This monthly usage information should include service start date, service end date, usage amount, and bill cost information (if available). Please send all data and/or queries to [building owner email].

Thank you,

[Signed]

### 6. Where can I find my Portfolio Manager ID?

Follow [this link](#) to log in to your Portfolio Manager account. You can find your Portfolio Manager ID in the red highlighted area in the image below.

The screenshot shows the Portfolio Manager interface for a 'Test Property' at 123 Main St, San Diego, CA 92101. The interface includes a navigation bar with tabs for Summary, Details, Energy, Water, Waste & Materials, Goals, and Design. The 'Details' tab is active, showing 'Basic Information' and 'Property Uses and Use Details'. The 'Unique Identifiers (IDs)' section is highlighted with a red box, showing the 'Portfolio Manager ID: 6779043'. Other sections include 'Construction Status', 'Occupancy', 'Property GFA', and 'Property Type'.

**Portfolio Manager ID**

# Step-by-Step Guide

## Appendix: Utility Data Access Issues

Some utility companies have requirements for sharing tenant-paid utility data that make it infeasible to secure whole-building data if tenants pay in-unit utilities. The table below is based on Bright Power’s experience working with various utility providers. These utility providers do not provide utility account data to non-account holders. If your tenants have accounts with the utilities listed below, you will not be able to complete the survey as you will not be able to access the required data.

State	Water Utilities	Electrical Utilities	Gas Utilities
Alabama	Birmingham Water Works Board	Huntsville Utilities Muscle Shoals Electric Dept	
Arizona		Tucson Electric Power UniSource	Southwest Gas UniSource
Arkansas	Central Arkansas Water Centerton Water Conway Corp Fayetteville Waterworks Springdale Water Utilities	Conway Corp Southwestern Electric Power Company (SWEPCO)	Central Arkansas Water Centerton Water Conway Corp Fayetteville Waterworks Springdale Water Utilities
California	California Water Service Placer County Water Agency	Alameda Municipal Power Liberty Utilities	City of Long Beach Liberty Utilities
Colorado		Colorado Springs Utilities	
Connecticut	Norwich Public Utilities	Norwich Public Utilities	Norwich Public Utilities
Florida	Holley-Navarre Water System	Florida Power and Light Gulf Power	
Georgia	City of Covington Marietta Power and Water	Canoochee Electric Corporation City of Covington City of Marietta City of Norcross Flint Electric Membership Corp Marietta Power and Water Sawnee Electric Membership Corp. Snapping Shoals EMC Walton EMC Liberty Utilities	Atlanta Gas Light Co. City of Covington Gas South Georgia Natural Gas SCANA Energy Liberty Utilities
Idaho		Idaho Falls Power	
Illinois		Liberty Utilities	North Shore Gas People’s Gas Liberty Utilities
Iowa		Liberty Utilities	Liberty Utilities
Indiana	Citizens Energy Group	Indiana Michigan Power Co.	Citizens Energy Group
Kansas	City of Wichita Kansas		
Kentucky	Louisville Water Co.		
Louisiana		Dixie Electric Membership Corp Southwestern Electric Power Company (SWEPCO)	
Massachusetts		Liberty Utilities	Liberty Utilities

# Step-by-Step Guide

## Appendix: Utilities Table

State	Water Utilities	Electrical Utilities	Gas Utilities
Michigan		Indiana Michigan Power Co.	
Mississippi	Columbus Light and Water	Columbus Light and Water Pearl River Valley Electric	
Missouri		Ozark Liberty Utilities	Liberty Utilities
Montana	City of Missoula	Northwestern Energy	
Nebraska		Northwestern Energy	
Nevada			Southwest Gas
New Hampshire		Liberty Utilities	Liberty Utilities
New Mexico		Public Service Company of New Mexico (PNM)	
New York		PSEG Long Island	
North Carolina	City of Goldsboro Two Rivers Utilities (City of Gastonia)	Brunswick Electric Member Corp Two Rivers Utilities (City of Gastonia)	
Ohio		American Electric Power in Ohio City of Columbus Cleveland Public Power	Dominion Ohio
Oklahoma		Oklahoma Electric Cooperative Inc. Public Service Company of Oklahoma	
South Carolina	City of Columbia	Palmetto Electric Coop Inc. Santee Cooper	
South Dakota		Northwestern Energy	
Tennessee	City of Kingsport Memphis Light Gas and Water Tennessee American Water	Appalachian Power Co. Memphis Light Gas and Water Middle Tennessee EMC Nashville Electric Service	Memphis Light Gas and Water Shelbyville Power
Texas	Brownsville Public Utilities Board City of Denton City of Garland City of Irving City of McKinney Crossroads Utility Services New Braunfels Utilities (NBU)	Ambit Energy L.P. City of Denton City of Garland City of Lubbock CoServ (Denton County Electric Cooperative) CPS (City Public Service) New Braunfels Utilities (NBU) Pedernales Electric Coop Inc. Southwestern Electric Power Company (SWEPCO) Taylor Electric Tri-County Electric Coop Inc. Trinity Valley Electric Coop Inc.	CPS (City Public Service) Texas Gas



# Step-by-Step Guide

## Appendix: Utilities Table

State	Water Utilities	Electrical Utilities	Gas Utilities
Utah	Provo City	Provo City	
Virginia	Newport News Waterworks	Appalachian Power Co.	Richmond Gas Town of Orange Virginia Natural Gas
Washington	City of Kirkland City of Renton Town of Steilacoom	Benton PUD Town of Steilacoom	
West Virginia		Appalachian Power Co.	

**Still have questions?**

Please contact [MFEnergyWaterSurvey@BrightPower.com](mailto:MFEnergyWaterSurvey@BrightPower.com) with questions at any time.