

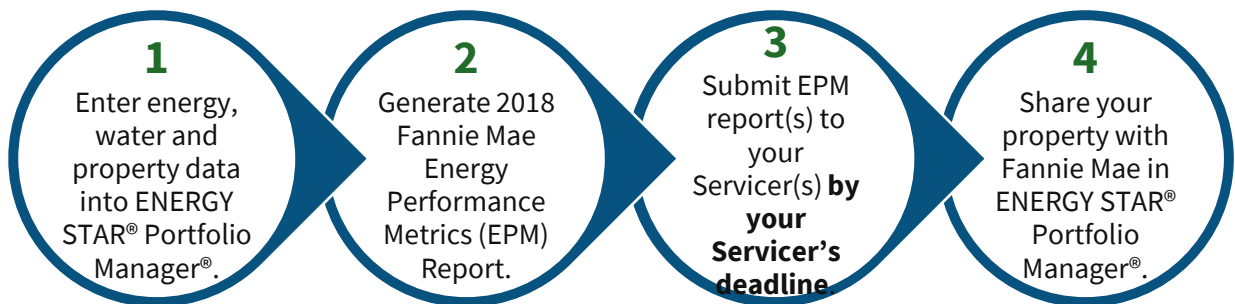
# How to Submit 2018 Energy Performance Metrics for Borrowers with Local or State Benchmarking Requirements

If your property is located in a city or state that requires benchmarking and the property has a Fannie Mae Loan, you are required to submit 2018 Energy Performance Metrics (EPMs) to Fannie Mae in 2019.

Properties in the following jurisdictions are required to benchmark by local law and must also submit their data to Fannie Mae, by following the steps outlined in this document.

<a href="#">Atlanta, GA</a>	25,000+ SF	<a href="#">Los Angeles, CA</a>	20,000+ SF
<a href="#">Berkeley, CA</a>	25,000 + SF	<a href="#">New York, NY</a>	25,000+ SF
<a href="#">Boston, MA</a>	35+ units or 35,000+ SF	<a href="#">Orlando, FL</a>	50,000+ SF
<a href="#">California</a>	50,000+ SF with 17+ units	<a href="#">Philadelphia, PA</a>	50,000+ SF
<a href="#">Cambridge, MA</a>	50+ units	<a href="#">Portland, ME</a>	50+ units
<a href="#">Chicago, IL</a>	50,000+ SF	<a href="#">Seattle, WA</a>	20,000+ SF
<a href="#">Denver, CO</a>	25,000+ SF	<a href="#">South Portland, ME</a>	10+ units in specified areas
<a href="#">Evanston, IL</a>	20,000+ SF	<a href="#">St. Louis, MO</a>	50,000+ SF
<a href="#">Kansas City, MO</a>	50,000+ SF	<a href="#">Washington, DC</a>	50,000+ SF

Submit your property's EPMs in 4 steps:



Questions? Call your Servicer or go to [www.fanniemae.greenfinancing.com](http://www.fanniemae.greenfinancing.com).



# Step 1. Enter Energy, Water and Property Data into ENERGY STAR® Portfolio Manager®

A

Log in to or set up your Portfolio Manager account at [www.energystar.gov/portfoliomanager](http://www.energystar.gov/portfoliomanager).

B

Update or create your property profile.

If submitting for the first time:

- Go to the **My Portfolio** tab and click **Add a Property**. Enter general information about your property and click **Get Started**.
- Enter your property's size, uses, and other details. Click **Add Property**.

You must include your property's irrigated area to generate an EPA Water Score.

To update an existing property:

- Go the **Details** tab on the page for your property.
- Under **Basic Information**, click **Edit**.
- Under **Property Details**, enter a value for Irrigated Area. If your property has no irrigated area, enter "0" (zero).

Add your Fannie Mae Loan Number in the first available "Custom ID field" for your property.

- Go the **Details** tab on the page for your property.
- Under **Unique Identifiers (IDs)**, click **Edit**.
- Type "Fannie Mae Loan Number" as the **Name** of Custom ID 1.
- Enter your Fannie Mae Loan Number in the **ID** field.
- If use **Custom ID 2** or **Custom ID 3** if others are taken.

The screenshot shows the ENERGY STAR Portfolio Manager login interface. At the top, it says "ENERGY STAR® PortfolioManager®". Below that, a description reads: "EPA's online energy management and tracking tool enables you to measure and track the energy and water performance of any building over time." There is a "Register now" link. The login section has a "Log in" heading, followed by "username" and "password" labels next to input fields. Below the fields are links for "Forgot password?" and "Forgot username?". A green "LOGIN" button is positioned to the right of the "Forgot username?" link.



## Enter your property's energy and water cost and consumption data for January - December 2018.

- In the property profile, go to the Energy or Water tab.
- If submitting for the first time, click Add a Meter to set up a meter for each meter serving the property. Enter meter information and click Get Started.
- Add meter entries to account for 12 consecutive months of energy and water cost and consumption for your entire property.

IMPORTANT: If any data is sampled or modeled instead of historical, you MUST indicate "Estimated" for the meter entry.

- Select the meters on the page Select Meters to Include in Metrics and click Apply Selections.



**Your utility may offer web services to automatically upload consumption data to Portfolio Manager. Check with your utility for details.**



## Step 2. Generate 2018 Fannie Mae EPM Report

**A** Click on this [link](https://tinyurl.com/2018FannieMaeEPM) or type <https://tinyurl.com/2018FannieMaeEPM> into your web browser to add the 2018 Fannie Mae Energy Performance Metrics Report to your Portfolio Manager account.

**IMPORTANT:** You **MUST** use this link to submit the report to your account.

**B** Fill out the form:

- If you are not the property owner, choose Someone Else and enter the owner's info.
- Timeframe will automatically be selected.
- To submit one or multiple properties' EPMs to one Servicer:


- Select **One Property** or **Multiple Properties**.
- Click Select Properties to choose which properties to include in your submission.

- NOTE: To submit multiple properties' EPMs to different Servicers, complete this process for each servicer.

**C** Click **Generate Response Preview**.

**D** Correct data (if needed):

Portfolio Manager may indicate that you have missing data. If so, click **Read More** and links will be provided to the missing data.

 Your new response preview(s) has been generated, however basic metrics could not be calculated for one or more properties in the request. [Read more](#)

If you change any data, you must generate a new response:

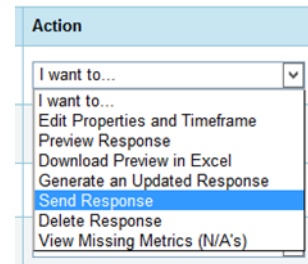
- Return to the **Reporting** tab.
- Locate the 2018 Fannie Mae EPM Report in the list.
- Select **Generate an Updated Response** from the Action menu.



## Step 3. Submit the EPM Report to Your Servicer

**A** When your data is finalized, submit your response:

- Return to the **Reporting** tab.
- Locate the 2018 Fannie Mae EPM Report in the list.
- Select **Send Response** from the Action menu.



**B** Follow the prompts on the next screen to complete the EPM report submission.

- **Who (besides you) should we send a confirmation e-mail to?** Add any e-mail addresses that you would like to receive a confirmation.
- **What format would you like your data in for the e-mail attachment?** Select Excel.
- **E-Sign your Data Response:** Indicate that you certify your data, enter your log-in credentials to confirm the response, and click **E-Sign Response**. A verification will then appear that indicates “Signed.”
- Click **Submit Data**.

**C** You will receive an e-mail from Portfolio Manager with the 2018 Fannie Mae EPM Report as an attachment. Forward the e-mail with the attachment or print and send by mail to your Servicer.

**NOTE: Repeat steps 1, 2 and 3 for properties for each additional servicer.**

**For more instruction and information, refer to...**

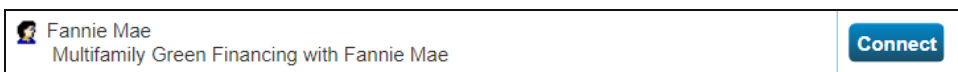
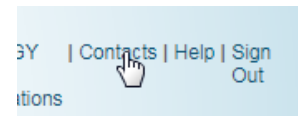
- [Portfolio Manager Quick Start Guide](#)
- [Fannie Mae FAQ for Borrowers with Local and State Benchmarking Requirements](#)
- EPA’s [Interactive Map](#) and [Full List](#) of utilities that offer whole building benchmarking data



## Step 4. Share your property with Fannie Mae

**A** Add Fannie Mae as a contact in Portfolio Manager

- Click **Contacts** in the top right of the screen.
- Click **Add Contacts**;
- Search for **FANNIEMAE2** username.
- Look for **Fannie Mae (Energy Performance Metrics)**



- Click the **Connect** button

**B** Your connection request will be **accepted within 1 business day.**

**C** Log back in to share your property with Fannie Mae

- Click **Share a Property** under the Sharing menu
- Choose the property (or properties) to share.
  - \*Choose all properties regardless of Servicer.\*
- Select the **Fannie Mae (FANNIEMAE)** account to share.
- Specific the sharing level as **LEVEL**:
  - **Bulk sharing**
  - **Read Only Access**
- **Click Share Properties**

