

## ENERGY STAR® BENCHMARKING SERVICE

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Let Yardi Energy simplify benchmarking to support your ESG and sustainability initiatives. Comply with regulations, green finance and ESG reporting using **ENERGY STAR Portfolio Manager®**. As an ENERGY STAR Partner of Sustained Excellence, Yardi has direct, automated access to import and export data in and out of Portfolio Manager.

Not only is Yardi an ENERGY STAR Partner, but also operates its corporate headquarters from ENERGY STAR certified buildings based in Santa Barbara, CA. To receive this certification, the two buildings have met ENERGY STAR's strict energy performance standards. This means the buildings save energy and money as well as help protect the environment by generating fewer greenhouse gas emissions than typical buildings.

Our team of benchmarking experts and **Certified Energy Managers (CEM®)** can perform all necessary steps to set up and maintain Portfolio Manager accounts for the buildings in your portfolio, eliminating a complex and time-consuming process for your team. We ensure that all required building information is entered correctly, which is critical to receiving an accurate ENERGY STAR score.

We can push verified consumption data to Portfolio Manager and retrieve ENERGY STAR scores for reporting. This provides Yardi's clients with ENERGY STAR information in Yardi's reporting platforms, saving clients the need to log into ENERGY STAR just to see their data.

As an added complexity, certain jurisdictions require whole building data where tenants are metered directly by the utility. Many utility providers offer an option to request whole building data. This represents the entire building's monthly consumption summed into one aggregated meter report, preserving the tenants' privacy. We work directly with the utility to complete the necessary paperwork, establish an account in the utility's data request portal, set up the links in Portfolio Manager, grant the required property permissions and upload the monthly data received from the utility on your behalf.

On the following pages, we address common questions from our clients about this service.



# ENERGY STAR FAQ

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## GENERAL QUESTIONS

### **What is ENERGY STAR Portfolio Manager?**

ENERGY STAR Portfolio Manager is a web-based platform for tracking building performance. It offers multiple user interfaces for tracking energy, water and waste. The U.S. Environment Protection Agency manages the platform with input from the U.S. Department of Energy and Natural Resources Canada.

### **What does ENERGY STAR benchmarking offer me?**

Benchmarking in ENERGY STAR Portfolio Manager offers reporting needed for regulation compliance, Green Finance Reporting and ESG whole building data gathering. It provides useful metrics for comparing your buildings to similar buildings across North

America. Building data is normalized for local weather impacts to energy, which facilitates comparisons of properties in different climates. Buildings are scored by ENERGY STAR from 1 to 100; a score of 50 represents the average for each building type.

### **Where can I see my ENERGY STAR Portfolio Manager data?**

You will maintain direct access to your portfolio in ENERGY STAR Portfolio Manager. Additionally, you can access reports on benchmarking data, including user friendly reporting, in Yardi Pulse so you do not need to log in to ENERGY STAR Portfolio Manager to review your ENERGY STAR scores and other key data.

## SETUP QUESTIONS

### **Does Yardi load data into ENERGY STAR Portfolio Manager?**

Yes. We are an ENERGY STAR Partner and we maintain links between our Yardi Utility Invoice Processing systems and ENERGY STAR Portfolio Manager. This provides an automated transition between gathering data from utility bills and entering your verified data into ENERGY STAR Portfolio Manager, rather than relying on manual data entry.

### **Can Yardi obtain whole-building aggregated data wherever available?**

Yes. This is our routine and recommended best practice when utility vendors provide this information. We set this up and receive whole building data in all formats vendors currently provide.

### **Can Yardi push data to existing ENERGY STAR Portfolio Manager accounts or do you have to set up a new account?**

Yes, we can integrate with existing setups if the current account owner can work with us to share access and necessary details. We coordinate data entry transitions to avoid gaps or overlaps in meter data.

### **What is the timeline to add this benchmarking service to our properties?**

Setup timelines range from a few days to several weeks depending on the utility vendors' integrations. We complete our part of the integration quickly and have vendor relationships to make setup as efficient and fast as possible. Usually, ENERGY STAR setups are completed within 30 days after a property is live in Utility Invoice Processing.

## **What is required for Yardi to set up the benchmarking service?**

Benchmarking with Yardi relies on using Yardi Utility Invoice Processing for data capture. Once you're ready to implement the benchmarking service, we will assign a Benchmarking Analyst to review and discuss your specific needs. We understand the different information and process requirements for different programs, vendors and regulations, so we can collect the necessary information from you without spending time on unnecessary details. After collecting the information, we complete all required setup and linking to benchmark your properties successfully.

## **PROCESSING QUESTIONS**

### **Does Yardi push energy, water and waste data into ENERGY STAR Portfolio Manager?**

Yes. We are an ENERGY STAR Partner with interface access for sharing data with ENERGY STAR Portfolio Manager. We can send and retrieve information between that platform and our systems. All commodities set up in Yardi Utility Invoice Processing can be linked into ENERGY STAR Portfolio Manager, including energy, water, waste and recycling data.

### **How often is the data pushed into ENERGY STAR Portfolio Manager?**

Data is sent to ENERGY STAR Portfolio Manager as soon as it is available through automated synchronization. We recommend monthly uploads as best practice because this timeframe makes it easy to identify and correct data errors from utility providers. Data in Portfolio Manager is reviewed monthly and ahead of compliance dates as well.

### **How does Yardi collect the data for ENERGY STAR Portfolio Manager?**

Our systems collect data from energy, water, waste and recycling vendors using multiple methods. We prefer electronic collection to ensure accuracy, but when the utility vendor doesn't provide this option,

## **What if my building changes or I make upgrades to it?**

We review your ENERGY STAR property attributes with you annually and update your setup in ENERGY STAR Portfolio Manager whenever you notify us of significant changes. Items such as property updates or changes to use types are routinely addressed through our benchmarking service. We will also provide an annual summary of your portfolio for you to review and provide feedback on any changes.

we will enter the required data manually into ENERGY STAR Portfolio Manager. Once data is in our systems, it also synchronizes to ENERGY STAR Portfolio Manager.

### **Is data pushed to ENERGY STAR Portfolio Manager at the meter level?**

Yes. Our system synchronizes verified meter data from Yardi Utility Invoice Processing to ENERGY STAR Portfolio Manager automatically and reports any errors if the data doesn't match as expected. Whole building data provided by utility vendors is sent to ENERGY STAR Portfolio Manager at the building level. We also receive data from other systems, such as on-site solar generation, and add this data into Portfolio Manager.

### **Can Yardi send all types of energy data to ENERGY STAR Portfolio Manager?**

Yes. Our benchmarking service can upload all commodities recognized by ENERGY STAR Portfolio Manager. Utility invoices flow through Yardi Utility Invoice Processing where they are audited before submission to Portfolio Manager. Data from outside sources, such as vendor whole-building or on-site solar, also can be uploaded.

## **Can Yardi push waste data into ENERGY STAR Portfolio Manager by waste stream (trash, mixed recyclables, compost, etc.)?**

Yes. All meter options in ENERGY STAR Portfolio Manager can be used for tracking waste. We report waste based on the units of measure shown on your invoices. We may need your input for tracking waste bins in ENERGY STAR Portfolio Manager that require “% Full” information. If vendors show weight on invoices, we capture this data during invoice processing and load it into ENERGY STAR Portfolio Manager. If only the volume of trash collected is shown on invoices, we use EPA methodology to convert the volume of trash to estimated weight.

## **Does Yardi push cost data for energy, water and waste into ENERGY STAR Portfolio Manager?**

We do collect cost data using Yardi Utility Invoice Processing and push that to ENERGY STAR Portfolio Manager. Costs are usually not available from vendors that provide whole building (aggregated) data.

## **How does Yardi ensure data quality?**

Benchmarking analysts use our system audits and reports to verify data quality. Vendor whole building data cannot be verified independently so we can verify address and meter lists when whole building data is requested. We use ENERGY STAR Portfolio Manager reports to review setups and ensure accuracy before regulatory compliance dates or reporting dates for

the programs you participate in. Our Utility Invoice Processing systems are reviewed by a third part to verify the quality of data being sent to ENERGY STAR.

## **Is data being reviewed manually by analysts?**

Reviews are both automated and manual. Our analysts work closely with you during implementation. We monitor and review portfolios monthly for data quality. To assist us in keeping your data accurate, we recommend that you confirm any changes to building attributes annually and ahead of any benchmarking compliance dates.

## **Does Yardi submit documents to government regulators for benchmarking regulations?**

Yes. We submit reports from ENERGY STAR on behalf of our clients and we reference the client’s account when submitting. We also ensure that our clients maintain individual user accounts in Portfolio Manager and always have full visibility to details stored in Portfolio Manager. Compliance dates are tracked for each property and properties can have multiple compliance programs linked for reporting.

## **Does Yardi provide ENERGY STAR certification service for buildings?**

Yes. This is an optional service, separate from Benchmarking and can be performed for our clients' buildings. The service involves a site visit and submission of certification documents to ENERGY STAR by a Yardi registered professional.

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Contact us for more information about  
Yardi ENERGY STAR Benchmarking Services.

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