

# BERDO REPORTING HOW-TO GUIDE



*A step-by-step guide to completing annual energy and water reporting and third-party data verification for BERDO in 2022.*

*Last Updated March 30, 2022*

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# INTRODUCTION

In October 2021, the City passed an update to the Building Energy Reporting and Disclosure Ordinance that amended the ordinance in its entirety. BERDO is now known as the **Building Emissions Reduction and Disclosure Ordinance (BERDO 2.0)**, giving the City authority to set **carbon emissions standards** for large buildings. The carbon emissions standards will decrease over time, with all BERDO buildings needing to achieve net zero emissions by 2050. The ordinance still requires large buildings to report their annual energy and water performance to the City, which then makes the information publicly available. BERDO 2.0 also includes new reporting requirements that are reflected in this guide.

This guide provides step-by-step instructions on how building owners can comply with the annual reporting requirements. There are three main parts to reporting in 2022:

1. **Energy Star Portfolio Manager:** The Environmental Protection Agency’s (EPA) Energy Star Portfolio Manager (ESPM) is used for reporting key building characteristics and energy and water usage.
2. **BERDO Reporting Form:** A new requirement in 2022, this form captures data required for BERDO 2.0 that isn’t included in ESPM.
3. **Third Party Data Verification:** Third-party data verification is a new requirement of BERDO 2.0 and must be completed by a qualified energy professional ([Details in Task 5](#)).

## WHICH BUILDINGS ARE COVERED?

In 2022 the following properties must report their energy and water use by June 15. See page 6 regarding an extension available by request for 2022. In 2023 and every year thereafter, these properties must report by May 15.

- Nonresidential buildings that are 20,000 ft<sup>2</sup> or larger (excluding parking)
- Residential buildings that are 20,000 ft<sup>2</sup> or larger (excluding parking) or have 15 or more units.
- Any parcel with multiple buildings that sum to 20,000 ft<sup>2</sup> (excluding parking) or 15 units must report on all buildings.

[Click here for the 2022 BERDO Covered Buildings List](#)

Square footage is determined per the gross floor area listed in Assessing Department records. If the Assessing data appears inaccurate, Owners may alternatively determine the Gross Floor Area by calculating total number of square feet measured between the principal exterior surfaces of the enclosing fixed walls of the building, following the specifications in the [regulations](#).

## WHO'S RESPONSIBLE?

The building owner(s), condominium association, or Board of Directors is responsible for reporting and overall compliance with BERDO. Non-residential tenants must, if asked, supply necessary information to the owner or association. More details on owner and tenant responsibility can be found in the [regulations](#).

## WHAT YOU WILL NEED TO REPORT

To prepare for reporting to BERDO you will need the following:

- Property address for each property required to report.
- A list of all energy utilities that served the building in 2021.
- Fuel delivery bills for the entire calendar year 2021.
- Basic property information including number of units and accurate square footage of the total property and of all building uses (e.g., square footage of ground floor retail and square footage of residential area).
- Number of meters serving the building.
- A third-party data verifier ([see more](#))

# TASK 1: FIND YOUR PARCEL ID, BERDO ID, AND BUILDING ADDRESS

Before you begin reporting through Portfolio Manager and the BERDO Reporting Form, you will need to identify your Parcel ID, BERDO ID, and building address through the [2022 BERDO Covered Buildings List](#).

If you don't know your parcel number, search the [Boston Tax Parcel Viewer map](#).

**Make note of your Parcel ID, BERDO ID and building address.** Moving forward, you will need to enter this information in the various reporting forms. It is imperative that you consistently use these identifiers so we can accurately merge your data.

- **Parcel ID** - Unique number used for tax identification. Multiple buildings may be on one parcel (e.g. a campus) or multiple parcels might be part of one building (e.g. a condo).
- **BERDO ID** - Used to track BERDO data and compliance. Each building should have its own unique BERDO ID.
- **Building Address** - The building address should be unique to each building. This may or may not be the same as the parcel address depending on the property's ownership structure.

Each building should have its own BERDO ID. If you think there is an error with your BERDO ID, Parcel ID, or building address, please email [energyreporting@boston.gov](mailto:energyreporting@boston.gov).

# TASK 2: REQUEST AN EXTENSION (optional)

## WHAT IS THE REPORTING AND VERIFICATION DEADLINE?

Building owners must complete their reporting and third-party data verification of 2021 data by June 15, 2022. The reports encompass the previous calendar year.

**In 2022, all buildings subject to BERDO 2.0 are eligible to apply for a one-time, six-month extension.** This extension will move the reporting and data verification deadline for calendar year 2021 data to December 15, 2022. This one-time extension will provide additional time to meet the new requirements set forth by the 2021 changes, including third-party data verification. Extension requests must be submitted by June 15, 2022.

## STEP 1 - GO TO THE BERDO REPORTING FORM

Extension requests must be submitted through the [BERDO Reporting Form](#) (a new reporting tool for 2022). To request an extension for your property, navigate to the BERDO Reporting form at [bit.ly/BERDOform](http://bit.ly/BERDOform).

## STEP 2 - CREATING A USERNAME

Navigate to [bit.ly/BERDOform](http://bit.ly/BERDOform) to access the BERDO Reporting Form login.

If you are reporting through the BERDO Reporting Form for the first time, follow these instructions to create a username.

1. Click 'Sign Up'.
2. Fill out the required information. Your username will be your email address.
3. Click 'Submit'.

## STEP 3 - CLAIMING YOUR PROPERTIES

Once you have a login, make sure your properties are registered with your account.

1. Click 'Claim Property'.
2. Search the table by entering either the property name, property address, or parcel number. All of these are listed in the [2022 Covered Buildings List](#). When you have found your property, click 'Claim' under the 'Claim Property' column.

- a. If the property was not previously claimed, it will be added to your account.
- b. If the property was previously claimed by another user, the BERDO team will be notified of the claim request. The BERDO team will either move the property to your account or reach out by email with further questions. This process ensures that two reports are not submitted for the same property.

**Please note:** If you are not able to find your property, select “Add Property” below the table and fill out the required information.

**Claim Property**

Use the [2022 Covered Buildings List](#) to find your parcel address, parcel ID, or BERDO ID. You can copy any of these into the search bar below to find and claim your property.

0303675000

10 per page ▾

Parcel ID	Parcel Address	# Buildings	BERDO ID(s)	Account Holder	Account Holder Email	Claim Property
0303675000	1 FANEUIL HALL MARKETPLACE 02109	1	104899			<a href="#">Claim</a>

If your BERDO property not included in the table above, please add it as a new property.

#### STEP 4 - REQUEST AN EXTENSION FOR YOUR PROPERTIES

After creating a login and adding your properties, a table of your assigned properties appears upon login. From there, you may request a 6-month extension.

**BERDO Reporting 2022**

Click "Edit Report" for each property to fill out the BERDO 2022 supplemental reporting.

Property Name	Official Address	Parcel	2022 Report	Due Date	Request Extension	Delete Property
123 Main	123 Main	1234567890	<a href="#">Edit Report</a>	05/15/2022	<a href="#">Request</a>	<a href="#">Request</a>

Extension requests are automatically approved. You can confirm the extension request for your property has been processed by checking “Due Date” on the “My Properties” table. It should change from 6/15/2022 to 12/15/2022 to reflect the extension.

# TASK 3: REPORT DATA THROUGH PORTFOLIO MANAGER

## STEP 1 - COLLECT ENERGY AND WATER DATA

All energy and water usage must be reported by building. Energy includes electricity, natural gas, steam, chilled water, fuel oil, on-site solar, diesel for backup generation, or any other energy source.

Utility data is typically accessed in two ways.

1. **If an owner pays energy or water bills for the whole building, usage data can be accessed through an online utility login or past bill copies.**

**Please note:** The data must encompass January 1 to December 31 of the reporting year. You may need 13 months of bills to cover the calendar year. Bill copies from December 2020 through January 2022 would ensure the full calendar year 2021 is reported.

2. **If multiple owners or tenants pay energy or water bills, whole-building energy use data is available** from Eversource, National Grid, and Vicinity Energy. Each utility provides data in an Excel file format for upload into Portfolio Manager.

Eversource and National Grid require tenant authorization to release usage data in two instances.

- Buildings with three or fewer tenants
- Buildings where one tenant uses over fifty percent of the energy.

Tenant authorization forms are available through [this link](#)<sup>1</sup>.

**Please note:** Eversource defines a utility account number as a tenant. They may inadvertently flag an owner-paid account as a tenant and request authorization. In this case, contact Eversource at [EnergyDisclosure@eversource.com](mailto:EnergyDisclosure@eversource.com) and copy [energyreporting@boston.gov](mailto:energyreporting@boston.gov) with your account and meter numbers.

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<sup>1</sup> [https://www.cityofboston.gov/images\\_documents/TenantAuthorizationForm\\_tcm3-43739.pdf](https://www.cityofboston.gov/images_documents/TenantAuthorizationForm_tcm3-43739.pdf)



## **How to request data from each utility**

### **ELECTRICITY - EVERSOURCE**

Eversource provides aggregate whole-building electric data through their 'Energy Reporting and Disclosure Portal'. Navigate to this portal by using [this link](#)<sup>2</sup>. Eversource provides complete step-by-step instructions on creating an online account and adding your building to the portal. Click [here](#) for these instructions.

For additional support accessing your Eversource data please email [EnergyDisclosure@eversource.com](mailto:EnergyDisclosure@eversource.com).

### **NATURAL GAS - NATIONAL GRID**

National Grid's benchmarking portal can transfer aggregate whole-building energy usage data directly to Energy Star Portfolio Manager. Once a building in Portfolio Manager is linked with National Grid, data is continuously updated. This eliminates the need for annual requests to National Grid.

[This document](#) outlines how to request aggregate energy usage data for direct upload to Portfolio Manager. If you are unable to complete the automated Portfolio Manager integration, you may request data by email. Email [BERDOSupport@nationalgrid.com](mailto:BERDOSupport@nationalgrid.com) and copy [daniel.sancomb@nationalgrid.com](mailto:daniel.sancomb@nationalgrid.com). Add the subject "BERDO Usage Request" and include the service address(es), the gas account number(s), and contact information.

For additional support accessing your National Grid data please email [BERDOSupport@nationalgrid.com](mailto:BERDOSupport@nationalgrid.com) and copy [daniel.sancomb@nationalgrid.com](mailto:daniel.sancomb@nationalgrid.com).

### **DISTRICT STEAM - VICINITY**

Vicinity Energy customers can email [berdo@Vicinityenergy.us](mailto:berdo@Vicinityenergy.us) for steam usage data. Include the address and account information.

### **WATER - BOSTON WATER AND SEWER**

Building owners can access their Boston Water and Sewer Commission account history at [www.bwsc.org/accounts/accounts.asp](http://www.bwsc.org/accounts/accounts.asp).

### **DELIVERED FUELS**

Delivered fuel oil, diesel, and any other delivered fuels must be reported. These fuel providers often won't have robust data systems, so it is important to retain all bills. Use your delivery bills to record the volume and dates of fuel deliveries made during calendar year 2021.

### **OTHER**

Any other energy uses not listed here must be reported. If you have questions about how to obtain or report additional fuels and energy, please reach out to [energyreporting@boston.gov](mailto:energyreporting@boston.gov).

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<https://www.eversource.com/ccberdoapps/energydisclosurereporting/energydisclosurelogin.aspx>

## STEP 2 - CREATING A PORTFOLIO MANAGER ACCOUNT

**Create an account in Energy Star Portfolio Manager (ESPM).** If you already have an account with your buildings and meters set up, you can skip to Step 6

1. Go to <https://portfoliomanager.energystar.gov/pm/signup>
2. Fill in the required information.

**Please note:** Compliance confirmations and other important emails will be sent to the email address that you register with.

## STEP 3 - ADD YOUR PROPERTY TO PORTFOLIO MANAGER

1. Once you've created an account, click on the "Add a Property" button.
2. Enter the primary property use and characteristics, and click "Get Started."
3. Enter basic property information.
  - a. Give your property a name. We recommend using the address (i.e. 123 Mass Ave).
  - b. Enter the property address. **You must use the official property address.** You can look up your official address through the [2022 BERDO Covered Buildings List](#). Do not use a vanity address.
  - c. Enter year built and occupancy.
  - d. Enter the gross floor area. You may use the gross floor area listed in [Assessing Department records](#)<sup>3</sup>. Gross floor area is measured as the space between the exterior surfaces of the building's enclosing fixed walls, subject to the inclusions and exclusions below.
    - i. **INCLUDE** tenant areas, common areas, meeting areas, restrooms, elevator shafts, stairways, basement space, mechanical equipment areas, and storage rooms.
    - ii. **EXCLUDE** all parking areas, exterior loading docks, exterior balconies, driveways, unroofed light wells, and plenums between floors.

For guidance on parking areas, buildings that share systems, or other property setup, see "[Special Issues & FAQ](#)"

- e. Enter the Standard ID (aka your BERDO ID)

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<sup>3</sup> [cityofboston.gov/assessing/search](https://cityofboston.gov/assessing/search)

- i. In the Standard IDs box, select “Boston Energy Reporting ID” from the dropdown menu.
- ii. Enter your **BERDO ID** in the ID field. Remember, you can look up your BERDO ID through the [2022 BERDO Covered Buildings List](#).

**Standard IDs**

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

**Standard ID(s):**

Boston Energy Reporting ID

▼

ID:

+ [Add Another](#)

**YOU MUST ENTER YOUR BERDO ID IN THIS FIELD. THIS IS A NEW REQUIREMENT IN 2022. YOUR BERDO ID IS SEPARATE FROM THE PARCEL ID REQUIRED IN PREVIOUS YEARS.**

- f. Read the “Do any of these apply?” checkboxes and select any that apply. Click “Continue.”

For additional guidance, review this Energy Star Portfolio Manager video detailing how to set up a property: <http://youtu.be/-lob65wkVNM>

#### **STEP 4 - ENTER PROPERTY DETAILS**

***Enter the gross floor area and details for each type of property use in the building.***

Follow these steps to ensure building uses are accurately defined for BERDO reporting.

1. If you have additional property use types in the building (for example, Office, Restaurant, etc.) find each one in the “Add Another Type of Use” dropdown box and click “Add.” Be as specific as possible in including additional building uses.

2. Enter the gross floor area of each use. Other details may be required depending on the property use type.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* <input type="text" value="50,000"/> Sq. Ft. ▾	<input type="text" value="1/1/1950"/>	<input type="checkbox"/>
★ Total Number of Residential Living Units	<input type="text" value="105"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1950"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Low-rise Building (1-4 stories)	<input type="text" value="0"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1950"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a Mid-rise Building (5-9 stories)	<input type="text" value="105"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1950"/>	<input type="checkbox"/>
★ Number of Residential Living Units in a High-rise Building (10 or more stories)	<input type="text" value="0"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1950"/>	<input type="checkbox"/>
★ Number of Bedrooms	<input type="text" value="150"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1950"/>	<input type="checkbox"/>

**Please note:** The starred property use details are required to calculate an Energy Star Score for the property. Not all starred details are required for compliance with BERDO. We recommend entering them if they are available. These details improve benchmarking and may be required for future non-City compliance reporting.

3. Enter Parking Use details (if applicable). Parking doesn't count towards your gross floor area, but Portfolio Manager requires parking use details to be entered if the property's energy consumption includes parking areas.
4. Click "Add Property".

### STEP 5 - DEFINE METERS WITH CORRECT UNITS

Set up your energy and water meters in Portfolio Manager with the correct units.

1. On the “Energy” tab of your new property, click “Add A Meter”.
  - A ‘meter’ in Portfolio Manager represents an energy source or water source. A delivered fuel, for example, is considered a ‘meter’ in Portfolio Manager even though there may not be a physical meter associated with the fuel.
2. Select each utility type that your building uses.
  - If you have received whole-building data, you can create one ‘meter’ to represent your building’s total use.
3. Click “Get Started” to enter units and dates for each meter.
4. Double-check the units to make sure they align with your data. If you used whole-building data services, the below utilities provide data in the following units.
  - Gas data from National Grid is in therms
  - Electricity data from Eversource is in kilowatt-hours (kWh)
  - Steam data from Vicinity is in thousand pounds (kLbs)
    - **Please note:** Vicinity Energy bills in ‘thousand lbs.’, but they list this as “mLbs” on bill copies. This is different from how Portfolio Manager uses “mLbs” which it interprets as ‘million lbs.’ Thousand lbs is listed as “kLbs” for Energy Star.
5. The “Date Meter Became Active” is the start date of the energy data you collected.

About Your Meters for 123 Main St

Enter the information below about your new meters. The meter’s *Units* and *Date Meter became Active* are required. You can also change the meter’s name.

**4 Energy Meters for 123 Main St (click table to edit)**

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Met ID 1 Name
<input type="checkbox"/>	Natural Gas	Natural Gas		therms	01/01/2018	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	Fuel Oil (No. 2)	Fuel Oil (No. 2)		Gallons (US)	01/01/2018	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	District Steam	District Steam		kLbs. (thousand pounds)	01/01/2018	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	Aggregate Eversource Data Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	01/01/2018	<input checked="" type="checkbox"/>		<input type="checkbox"/>	

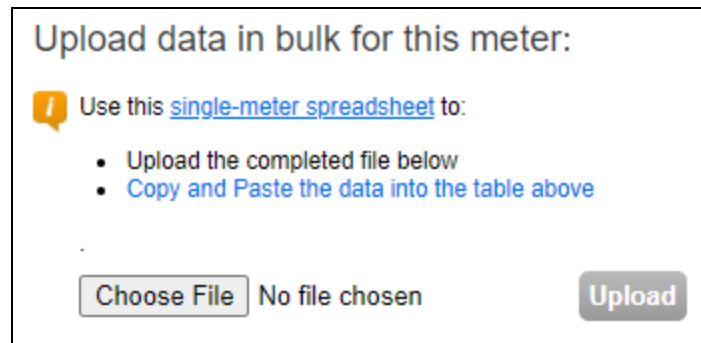
[Delete Selected Entries](#)  
[Add Another Entry](#)

6. Click “Create Meters.”

## STEP 6 - ENTER YOUR MONTHLY UTILITY DATA

### **Enter your monthly energy and water use data.**

If you’ve received whole-building data from Eversource, National Grid, or Vicinity Energy, data is provided in an excel format that can be uploaded to Portfolio Manager. Click on the “Choose File” button for the meter, find the appropriate Excel file, and click “Upload.” If the upload does not work, transfer the data to the “single-meter spreadsheet” template provided.



If you’re entering data manually, you may select “Click to add an entry”. Data must encompass the 2021 calendar year.

### **Please note the following:**

- Entering cost data is not required.
- Always check to make sure your units are correct.
- Portfolio Manager does not automatically save your data, so you must click “Continue” when you’re done entering your data.
- Make sure that there are no data gaps in the 2021 data reported and all meters are updated. Portfolio Manager requires all 365 days in the calendar year in order to calculate energy profiles and supply the City data. Even if only one day is missing, or one meter hasn’t been updated, the energy report can not be generated.

## STEP 7 - RUN A DATA QUALITY CHECK

1. Click on the “Summary” tab for your property. Click “Check for Possible Data Errors”. Run a check for the year ending December 31, 2021.
  - A common first-time error is “Less than 12 Full Calendar Months of Bills.” Revisit the identified meter and make sure all of 2021 is covered, with no gaps.

2. Re-run the checker once you have made any necessary corrections.
3. Once you are satisfied that you have addressed any errors, proceed to Step 8.

## STEP 8 - ENTER ANY CONTEXTUAL INFORMATION

**Enter any contextual information about your building's energy performance.**

1. Click on the "Details" tab of your property and scroll down to "Property Notes." Enter here any relevant contextual information about your building that you want to be included when metrics are publicly disclosed.

You must also record here if:

- a. You used any default energy values, and when those were used.
  - b. If you chose to use self-metered energy data instead of utility-provided data, and what the difference is.
  - c. Reporting was completed by a tenant who leases the whole building.
2. Click "Save Notes" when you're done.

Need more space for contextual information? If your information does not fit into the 1000-character limit, you may provide it by emailing it to [energyreporting@boston.gov](mailto:energyreporting@boston.gov).

## STEP 9 - UPDATE YOUR NEW BOSTON BERDO ID

**Everyone reporting in 2022 will need to update their Boston BERDO ID in Portfolio Manager. Your BERDO ID is separate from the Parcel ID required in previous years.**

To find your BERDO ID, reference the [2022 BERDO Covered Buildings List](#).

Without the BERDO ID, the City will be unable to confirm that you are in compliance with BERDO. This BERDO ID will make sure your submission links to the correct building during the City's compliance checks. If a submitted report does not contain this ID, the City will ask you to re-submit.

1. On the "Details" tab of your property, scroll to the "Unique Identifiers (IDs)" box and click "Edit."
2. Under "Standard IDs," select "Boston Energy Reporting ID." Enter your six-digit BERDO ID and click "Save."

### Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

**Standard ID(s):**

ID:

[+ Add Another](#)

**Save** [Cancel](#)

### STEP 10 - VERIFY YOUR DATA THROUGH A THIRD-PARTY

You may complete third-party verification before or after you share your data with the City.

For detailed guidance on completing the Third-Party Verification process, jump down to [Task 5](#).



## STEP 11 - CONNECT AND SHARE YOUR DATA WITH THE CITY

Starting in 2022, the City of Boston will use Energy Star Portfolio Manager's (ESPM) third-party data sharing capabilities. This will allow the City to pull data directly from ESPM and run some basic data checks. We hope that this change will result in more accurate data submissions and public data disclosures.

The following two actions are required of all BERDO building owners in order to correctly share your 2021 energy and water use with the City.

1. **Connect** your Portfolio Manager account with the City of Boston's Portfolio Manager account.
2. **Share** read-only access for your BERDO buildings.

**Please note:** You will only need to complete these actions once. Unlike previous reporting years, you will **not** receive a separate reporting link to submit your 2021 energy and water data.

### CONFIRM YOUR ACCOUNT INFORMATION

1. Confirm that your email address in your Portfolio Manager account is correct. Click on "Account Settings" in the upper right-hand corner of the screen.
2. Confirm that your unique BERDO IDs have been entered correctly for your buildings.

### CONNECT YOUR PORTFOLIO MANAGER ACCOUNT WITH THE CITY OF BOSTON

1. Click "Contacts" in the upper right-hand corner of the screen.
2. Click "Add New Contacts".
3. Search for the username "**CityofBoston**".
4. Click "Connect".

The screenshot shows a search interface with two main sections. On the left, under "Your Search Criteria", there are four input fields: "Name:" (empty), "Organization:" (empty), "Username:" (containing "cityofboston"), and "Email Address:" (empty). A blue "Search" button is at the bottom right of this section. On the right, the search results are displayed. The top header shows "City of Boston Environment Department (CityofBoston)" and "Energy Reporting and Disclosure with City of Boston", with a blue "Connect" button to the right. Below the header is a pagination bar with navigation arrows, "Page 1 of 1", and a dropdown menu set to "50". The bottom right of the results area shows "1 - 1 of 1".

5. A pop-up window will appear. Select the “Agreement” box and click “Send Connection Request”

Send a Connection Request to [City of Boston Environment Department](#) to Begin Exchanging Data

[City of Boston Environment Department](#) requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [City of Boston Environment Department](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use:                      None Provided

Agreement:                      \*  I agree to my provider's ([City of Boston Environment Department](#)) Terms of Use.

[Send Connection Request](#) [Cancel](#)

**Please note:** Connection requests must be approved before you can share your buildings. Portfolio Manager will approve these requests in cycles of 30 minutes. If you have not received a connection confirmation email within one hour of submitting a request, please contact [energyreporting@boston.gov](mailto:energyreporting@boston.gov).

### SHARE YOUR DATA WITH THE CITY OF BOSTON

1. Go to the “Sharing” tab in Portfolio Manager.
2. Click "Share (or Edit Access) to a property".
3. Select your BERDO properties and click “Apply Selection”.

**Please note:** If you are sharing a campus with multiple buildings, share **both** the campus and the individual buildings within the campus. For guidance on buildings that share systems, see [“Special Issues & FAQ”](#).

4. Select “**CityofBoston**” as the recipient.
5. Select "Personalized Sharing & Exchange Data ("Custom Orders")" and click “Continue”.
6. Select “Exchange Data” for each property.
7. A pop-up window will appear. Specify data attributes and permissions for each property.
  - Select "Read Only Access" for "Property Information" and "All Meter Information."
  - Select “None” for "Goals, Improvements, & Checklists" and "Recognition".
  - Select “Yes” for “Share Forward”.

**Please note:** Enabling “Share Forward” will give the City permission to share data with other City of Boston Portfolio Manager accounts.

Select the permission level below that you would like to grant [City of Boston Environment Department](#) for each category.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
▼ All Meter Information			
▼ Energy Meters			
Aggregate Eversource Data Electric Grid Meter	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
District Steam	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Fuel Oil (No. 2)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Natural Gas	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

- Click “Apply Selections & Authorize Exchange”.
- Once you’ve completed Exchange Data access for each property, click “Share Property(ies)”.

Once the City accepts the shared properties, you’ll receive a confirmation email.

For additional guidance on sharing properties within Portfolio Manager, click [here](#).

**IMPORTANT NOTE: This is the last step for submitting data through Energy Star Portfolio Manager. Please ensure you complete it in full. Prior to 2022, this was the final step for reporting. New in 2022, owners must also complete the BERDO Reporting Form in addition to submitting data through ESPM.**

# TASK 4: REPORT SUPPLEMENTAL DATA THROUGH BERDO REPORTING FORM

Starting in 2022, owners will need to complete a [BERDO Reporting Form](#) for each of their properties. This form is an important component to BERDO reporting because it collects required and optional information that cannot be reported to Energy Star Portfolio Manager (ESPM). The information provided through the BERDO Reporting Form will be important in complying with emissions standards beginning in 2025.

The below guidance details how to create a username, add your buildings to your profile, and report supplemental information for each building.

## STEP 1 - CREATING A USERNAME

***You may have already completed this step if you requested a reporting extension. If so, use the login information you already created.***

Navigate to [bit.ly/BERDOform](https://bit.ly/BERDOform) to access the BERDO Reporting Form login.

If you are reporting through the BERDO Reporting Form for the first time, follow these instructions to create a username.

1. Click 'Sign Up'.
2. Fill out the required information. Your username will be your email address.
3. Click 'Submit'.

## STEP 2 - CLAIMING YOUR PROPERTIES

Once you have a login, make sure your properties are registered with your account.

1. Click 'Claim Property'.
2. Search the table by entering either the property name, property address, or parcel number. All of these are listed in the [2022 Covered Buildings List](#). When you have found your property, click 'Claim' under the 'Claim Property' column.

- a. If the property was not previously claimed, it will be added to your account.
- b. If the property was previously claimed by another user, the BERDO team will be notified of the claim request. The BERDO team will either move the property to your account or reach out by email with further questions. This process ensures that two reports are not submitted for the same property.

**Please note:** If you are not able to find your property, select “Add Property” below the table and fill out the required information.

3. When you have selected your properties, return to the ‘My Properties’ table. From here, you will be able to complete the BERDO Reporting Form, request an extension, or remove properties from your account.

### STEP 3 - COMPLETE A REPORT FOR EACH PARCEL

In the ‘My Properties’ view of the BERDO Reporting Form, click on “Edit” under “2022 Report” to begin your report. This form is to be completed for each parcel, so it may include information for multiple buildings on one parcel. This is different from Portfolio Manager data, which must be entered for EACH BUILDING on a parcel.

The BERDO Reporting Form has five short sections:

1. Property and contact information
2. Renewable Energy
3. Energy Use Exempt from Emissions Requirement
4. Additional Optional Reporting
5. Follow Up

All required questions must be answered to submit the form and move forward to third-party verification. All other questions are optional, but we strongly encourage you to answer as many as possible. Answers to these optional questions will provide a better picture of your building’s overall emissions and will help us refine reporting requirements in future years.

Once completed, select “Next” on the bottom of the page. **Please note that your work will NOT be saved until you click "Next" at the bottom on the page.** If your form is not submitting, please scroll to the top of the page to see if there are any errors. Any errors will be noted in a red box at the top of the page.

### STEP 4 - SUBMIT YOUR DATA TO YOUR THIRD-PARTY VERIFIER

Once this data is submitted, you will need to enter the name and contact information of your third-party verifier. When you click ‘Submit,’ your third-party verifier will be emailed a link to

review your report. See Task 5 for more detailed information about how to complete third-party data verification.

**Verifier Name \***

First	Last
-------	------

**Third Party Verifier Organization \***

**Third Party Verifier Email Address \***

**Third Party Verifier Phone Number \***

**Submit**

If the verifier approves your report, it will be sent on to the BERDO Team. If the verifier rejects it, you will receive an email detailing the errors and will be asked to edit and resubmit your report.

**Please note:** Your third-party verifier cannot verify your supplemental report until they verify your report in EPA's Energy Star Portfolio Manager.

# TASK 5: THIRD-PARTY DATA VERIFICATION

Verification of reported data by a qualified third-party ensures accurate compliance by enhancing the quality of data reported. As we approach the requirement to meet emissions standards beginning in 2025, it is critical that owners have an accurate understanding of their building’s performance so they can plan for meeting these emissions standards.

## THIRD-PARTY VERIFICATION SCHEDULE

Reported data must be verified by a third party beginning in 2022. The below schedule outlines when data needs to be verified and the time period(s) covered by each verification.

**Please note:** The first year of verification only requires 2021 calendar data to be verified.

Year of Third-Party Data Verification for buildings required to report in 2022	Calendar Year(s) to Verify
2022	2021
2026	2022 through 2025
2030	2026 through 2029
2035	2030 through 2034
2040	2035 through 2039
2045	2040 through 2044
2050	2045 through 2049

## CONNECT WITH A QUALIFIED ENERGY PROFESSIONAL FOR THIRD-PARTY VERIFICATION

Building owners must use a third-party professional who holds an active qualification of at least one of the credentials listed in the table below. At this time, the City of Boston is not able to recommend or refer you directly to a Qualified Energy Professional.

Profession	Credential	Organization
Engineer	Professional Engineer (PE)	National Society of Professional Engineers (NSPE)
Architect	Licensed Architect	National Council of Architectural Registration Boards (NCARB)
Architect	Registered Architect (RA)	American Institute of Architects (AIA)
Energy Modeler	Passive House	Passive House Institute US (PHIUS)
Energy Auditor	Building Energy Assessment Professional (BEAP)	American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)
Energy Auditor	Certified Energy Auditor (CEA)	Association of Energy Engineers (AEE)
Energy Auditor	Building Energy Modeling Professional (BEMP)	American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)
Energy Auditor	RPA/FMA High Performance Designation (RPA/FMA-HP)	BOMI International
Energy Auditor	Certified Measurement and Verification Professional (CMVP)	Association of Energy Engineers (AEE)
Energy Auditor	LEED Advanced Professional (AP) Building Operations & Maintenance	U.S. Green Building Council (USGBC)
Commissioning Professional	Commissioning Process Management Professional Certification (CPMP)	American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)
Commissioning Professional	Certified Commissioning Professional (CCP)	Building Commissioning Association (BCA)
Commissioning Professional	Associate Commissioning Professional (ACP)	Building Commissioning Association (BCA)



Commissioning Professional	Certified Building Commissioning Professional (CBCP)	Association of Energy Engineers (AEE)
Commissioning Professional	Existing Building Commissioning Professional (EBCP)	Association of Energy Engineers (AEE)
Commissioning Professional	Certified Commissioning Authority (CxA)	AABC Commissioning Group (ACG)
Energy Manager	Operations and Performance Management Professional (OPMP)	American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)
Energy Manager	Certified Energy Manager (CEM)	Association of Energy Engineers (AEE)
Energy Manager	Energy Management Professional (EMP)	Energy Management Association (EMA)
Building Operator	Building Operator Certification (BOC) Level 2	Northwest Energy Efficiency Council (NEEC)

**STEP-BY-STEP VERIFICATION INSTRUCTIONS FOR BUILDING OWNERS**

**Step 1 – Find a Qualified Energy Professional**

Find a Qualified Energy Professional for Third-Party Verification *outside of your organization* holding a credential accepted by the City.

**Step 2 - Send BERDO Report to Third-Party Verifier**

After completing the BERDO Reporting Form, owners must enter the name and email address of their Third-Party Verifier. The Verifier will review the BERDO Reporting Form and the ESPM data. The Verifier will either approve the reported data or reject the reported data. In both cases the account holder and building owner will be notified by email.

**Step 3 – Assist with the verification process**

A Third-Party Verifier will need access to Portfolio Manager account data and any relevant information listed in the data verification table below. The Third-Party Verifier will review any errors or inconsistencies and discuss how to resolve them with the owner.

**Step 4 – Keep any verification records**

Once verification of data within Energy Star Portfolio Manager is complete, the Verifier will send a signed Data Verification Checklist to the building owner. Building owners must keep a copy of each Data Verification Checklist for at least ten years.

## STEP-BY-STEP VERIFICATION INSTRUCTIONS FOR THIRD-PARTY VERIFIERS

### Step 1 – Collect any information needed from the building owner

- Connect with the building owner as a contact within Energy Star Portfolio Manager. The building owner will provide you with either read-only or full access to their property.
- Request access to utility data sources. This may require login access to benchmarking portals or bill copies. This will help in confirming that any aggregate data was correctly requested for the entire building, and entered by the owner.
- Ask for other documentation needed to complete verification. Reference the data verification table below for documentation needed to confirm building and energy usage data.
- Run the Data Quality Checker within Portfolio Manager to verify that all data was entered for the calendar year being verified. If there is any missing data, notify the owner and have them fix any missing data errors.

### Step 2 – Review the data in Portfolio Manager using the Energy Star Data Verification Checklist

Once you have supporting information from the building owner, review the Portfolio Manager property record. Use the Energy Star Data Verification Checklist **as a guide** during the verification. The Energy Star Data Verification Checklist can be accessed from the ‘Reporting’ tab within Portfolio Manager. Check off each section as you review it for correctness, as well as whether the data accurately represents the building you are verifying.

Notify the building owner of any errors identified. When the identified errors are corrected, the verifier should proceed to Step 3.

[Here is a link to a sample Energy Star Data Verification Checklist.](#)

**Please note:** The Energy Star Data Verification Checklist lists some data that will not need to be verified for BERDO reporting in 2022. Therefore, it should only be used as a guide to aid in keeping track of each building’s verification. The data verification table below confirms all information types to verify for BERDO in 2022.

### Step 3 – Complete and sign the Energy Star Data Verification Checklist

As the BERDO Data Verifier, make sure your name, date, and signature appear on the final page of the Energy Star Data Verification Checklist. A stamp is only required if a building owner is pursuing an Energy Star Certification.

The signed Energy Star Data Verification Checklist should be downloaded and emailed to the building owner. Advise the building owner that they must keep this signed document for their records. A PDF copy must also be uploaded to the BERDO Reporting Form as part of the final verification.

**Step 4 – Enter your credential information into Portfolio Manager**

In Portfolio Manager, enter the credential information in the ‘Verification’ field on the ‘Details’ tab of the building. This information should include: Calendar Year of Data Verified, Date of Verification, Full Name, Title, Organization, Phone Number, Email, Postal Code, and your Professional Designation (Credential Name, Acronym, Certifying Number (if available), and State).

**Step 5 – Verify data submitted through the BERDO Reporting Form**

Third-Party Verifiers are also required to approve of the building owner’s BERDO Reporting Form submission. Building owners are prompted to enter their Third-Party Verifier contact details upon submission. The below email is then sent to the verifier with the subject line “Verify Supplemental BERDO Report”.



Verify any data submitted by the building owner through their BERDO Reporting Form submission. You must confirm if you have already verified the building data within Energy Star Portfolio Manager. If not, this report cannot be completed.

If Portfolio Manager data has been verified, enter your contact information, Third-Party Verifier credentials, and upload a copy of the signed Portfolio Manager checklist.

If you accept the report, the report is submitted to the City’s BERDO team. If you reject the report, explain why the report has been rejected and how the building owner can fix it.

### Third Party Verifier Information

Please enter your information below.

Have you verified the main report in EPA's Energy Star Portfolio Manager yet for this property? \*

- Yes
- No

Verifier Name \*

Organization \*

Phone Number \*

Email Address \*

What credential(s) do you hold that permit you to verify this report?

Select all that apply \*

- PE
- ASHRAE Professional
- Certified Energy Manager
- Other

Please upload proof of your credential \*

 No file chosen

Do you accept or reject this supplemental BERDO report? \*

- Accept
- Reject

Please explain to the building owner why you are rejecting their supplemental report and what they can do to fix it. \*

*This information will automatically be emailed to the building owner.*

**INFORMATION TO VERIFY FOR BERDO**

BERDO third-party verification ensures owners are accurately preparing for and complying with emissions standards beginning in 2025. This requires that building size, building use types, and utility energy data are accurately reported. The table below lists the type of information to verify and corresponding data sources typically requested by a verifier. All data should be carefully checked against the requirements of the Ordinance and Regulations.

<b>Verification Actions</b>	<b>Information Type to Verify</b>	<b>Data Sources Typically Requested by Verifiers</b>
Confirm square footage and allocation to appropriate building use is correct in ESPM.	Gross Floor Area by Building Use Type	<ul style="list-style-type: none"> <li>• City of Boston Assessing</li> <li>• If calculating alternative area must confirm with Building Documentation (Blueprints, Architectural Plans, PCNAs)</li> </ul>
Confirm unit count is accurate in ESPM ( <i>residential only</i> )	Number of Units in the Building	<ul style="list-style-type: none"> <li>• Building Documentation</li> <li>• Rent Roll</li> <li>• Rental Unit Registration with ISD</li> </ul>
Confirm all energy usage is accounted for in ESPM, including all delivered fuels and all usage from leased spaces.	Number of Meters in the Building, Delivered Fuels	<ul style="list-style-type: none"> <li>• Meter Numbers by Fuel Type (provided by Owner with documentation or through a walkthrough)</li> <li>• Utility and Energy Bills</li> <li>• List of Addresses Served by Shared Systems</li> </ul>
Confirm all energy use is accurately reported in ESPM	Annual Usage from All Energy Types: Electric, Gas, Steam, and Fuel Deliveries	<ul style="list-style-type: none"> <li>• Online Access to Data Request Portals</li> <li>• Copies of Energy Bills</li> </ul>
<b>Fields below are optional for 2022, but will be required for compliance with emissions standards starting in 2026.</b>		
Confirm eligibility of any RECs.	Renewable Energy Credits (RECs)	<ul style="list-style-type: none"> <li>• Certification of Retired RECs</li> </ul>
Confirm eligibility of any PPAs.	Power Purchase Agreements (PPAs)	<ul style="list-style-type: none"> <li>• Terms of the PPA</li> <li>• Certification of Retired RECs</li> </ul>
Confirm use of backup generation to be exempted from emissions standards.	Backup Generator Usage	<ul style="list-style-type: none"> <li>• Documentation used to track generator usage</li> <li>• Energy bills for fuel used by backup generator</li> </ul>
Confirm EV charging station usage to be exempted from emissions standards.	EV Charging Station Usage (kWh)	<ul style="list-style-type: none"> <li>• Documentation through a report from the EV charging provider</li> <li>• Energy bills if on a separate meter</li> </ul>

It is recommended that third-party verifiers compare a building’s emissions or energy use intensity with similar buildings as a way to flag possible errors in reporting data.

## TASK 6: PRESERVE RECORDS

Building owners must retain the following records in printed or electronic format for ten years.

1. Records necessary to demonstrate compliance with data reporting including any back-up information
  - Energy and water bill copies
  - Fuel delivery bill copies
  - Aggregate whole-building data received from the utility providers
2. Records confirming data submission through Portfolio Manager and the BERDO Reporting Form
  - Data Response Receipt from Energy Star Portfolio Manager
  - Submission confirmation from City of Boston BERDO team
3. Requests to tenants made for information needed for compliance
  - Signed tenant authorization forms
4. Third-Party Verification confirmations and contact information of the verifier uploaded to Portfolio Manager and the BERDO Reporting Form
5. Requests for extensions of reporting deadlines.
  - Email confirmation of approved extension request

Records must be retained until at least ten years. The reporting regulations require the seller to transfer to the new owner any information that has been collected for completing the next energy and water report.

## NEXT STEPS

### DATA DISCLOSURE

The City will ultimately publicly disclose data reported through BERDO on the City's [open data portal Analyze Boston](#)<sup>4</sup>. This disclosure will include basic building identification, energy intensity, carbon emissions per square foot, reporting compliance status, and water consumption per square foot. The City will notify building owners at least thirty days prior to the disclosure to provide an opportunity to review the information.

### FOLLOW-UP

- *Revisions.* If you obtain updated or corrected information that changes your emissions intensity by more than 2%, you need to update your submission. In Portfolio Manager, revise your data, re-submit your report, and notify the City of your updated report. Data must be updated within 30 days of obtaining the information. You can submit other updates at any time.
- *Errors.* If errors or missing data are found in your report, you will be notified by the City. You will be provided 30 days to make the necessary corrections, per the revision procedure above.
- *Tenant non-compliance.* You may report any non-residential tenants that have failed to comply with a data request. For follow-up and potential enforcement action by the City, contact [energyreporting@boston.gov](mailto:energyreporting@boston.gov).

### ENFORCEMENT

Failure to comply with BERDO reporting requirements will be subject to a Notice of Violation and subsequent fines. This information is detailed in [the ordinance](#).

### ENERGY STAR CERTIFICATION

If your building scores an Energy Star rating of over 75, you may be eligible for Energy Star Certification, awarded by EPA. Buildings may be required to meet additional criteria and data quality standards. Find out more at [energystar.gov/buildings/building\\_recognition](https://energystar.gov/buildings/building_recognition)

### SHARING INFORMATION ON BUILDING ENERGY PERFORMANCE

If you would like to communicate information on building energy performance with potential tenants or other interested parties, Portfolio Manager can generate a user-friendly Statement of Energy Performance. In Portfolio Manager, click on the “Reporting” tab. On the right side, select “Statement of Energy Performance” to generate a summary PDF.

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<sup>4</sup> <https://data.boston.gov/dataset/building-energy-reporting-and-disclosure-ordinance>

## ADDITIONAL SUPPORT

We are committed to helping building owners collect and report their data in 2022. Here are a few of the things we are planning in 2022:

- Hosting recorded webinars to walk through reporting and to answer questions.
- Webinars can be attended live or viewed online afterwards.
- Drop-in virtual office hours for Q&A on reporting with staff
- One-on-one assistance via email at [energyreporting@boston.gov](mailto:energyreporting@boston.gov) or phone at 617-635-3850x5.

For additional resources, guidance, and further information on BERDO requirements, visit [boston.gov/BERDO](http://boston.gov/BERDO).

Help using Portfolio Manager is available at [energystar.gov/buildings/training](http://energystar.gov/buildings/training) or by contacting the Energy Star helpdesk at <https://portfoliomanager.zendesk.com/hc/en-u>.

For technical and financial resources for planning retrofits to meet upcoming emissions standards, visit the City of Boston's [Retrofit Resource Hub](#).

## KEY CONTACTS

Organization	Contact
City of Boston BERDO Team	<a href="mailto:energyreporting@boston.gov">energyreporting@boston.gov</a>
Eversource	<a href="mailto:EnergyDisclosure@eversource.com">EnergyDisclosure@eversource.com</a> and copy <a href="mailto:BostonEnergyConsultant@eversource.com">BostonEnergyConsultant@eversource.com</a>
National Grid	<a href="mailto:BERDOSupport@nationalgrid.com">BERDOSupport@nationalgrid.com</a> and copy <a href="mailto:daniel.sancomb@nationalgrid.com">daniel.sancomb@nationalgrid.com</a>
Vicinity	<a href="mailto:berdo@Vicinityenergy.us">berdo@Vicinityenergy.us</a>
Boston Water and Sewer	<a href="https://www.bwsc.org/about/contact">https://www.bwsc.org/about/contact</a>



## SPECIAL ISSUES & FAQ

### WHAT IF I HAVE MULTIPLE BUILDINGS ON ONE LOT, OR MULTIPLE BUILDINGS THAT SHARE METERS?

If there are multiple buildings that share energy or water systems, data must be reported in the following ways.

- **A building has energy or water use that is separately metered or sub-metered.** Data must be reported at the building level.
- **Buildings classified as the same building use share energy or water use and are not separately metered or sub-metered.** The total shared energy or water use should be apportioned by the Gross Floor Area of each building and reported for each such building. The apportioned data must be marked as an “Estimation” in Portfolio Manager.
- **Buildings that are not classified as the same building use share energy or water and are not separately metered or sub-metered.** These should be reported as a campus as defined in Portfolio Manager.

Refer to Appendix A of the [Regulations](#) for building use classifications.

For guidance on how to set up a campus within Portfolio Manager, click [here](#).

### WHICH PROPERTY USES SHOULD I SELECT TO REPRESENT MY BUILDING?

Portfolio Manager has approximately 80 different property use categories. You should accurately represent all uses that are found within your building. A list of definitions is available at:

<https://www.energystar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details>

### HOW IS PARKING REPORTED?

Parking is not included when determining whether a building must comply with BERDO, but buildings that are required to comply with BERDO must report their enclosed parking in Portfolio Manager. For example, a building with 19,000 square feet of commercial area on top of 2,500 square feet of enclosed parking is not subject to BERDO. However, a building with 20,000 square feet of commercial space on top of 2,500 square feet of enclosed parking would need to report the parking area and the accompanying energy usage in ESPM. Standalone parking garages are not required to report to BERDO.

When parking is part of a building, it does not count towards gross floor area in Portfolio Manager, since Portfolio Manager focuses on the energy use of the actual building interior. For example, if you have a building with 100,000 square feet of office space and 20,000 square feet of parking, you should enter a gross floor area of 100,000 square feet into Portfolio Manager. You must enter information on parking area, but it will not count towards your gross floor area.

### **WHAT IF I DON'T USE THE DATA AVAILABLE FROM MY UTILITY?**

If whole-building data is available from a utility, you must use the utility-provided data or use whole-building data from your own source (such as data obtained from all tenants or from an energy or building management system). As discussed in Step 8, you must note in “Property Notes” if you do not use utility-provided data, and an explanation of any difference.

### **HOW DO I DETERMINE THE GROSS FLOOR AREA FOR A BUILDING OR FOR A PROPERTY USE WITHIN THE BUILDING?**

Many building owners will have information on gross floor area from leasing, sale, or other transactional documents, or can consult Assessing Online [cityofboston.gov/assessing/search](https://cityofboston.gov/assessing/search). Inspectional Services may also have records of square footage in its permit database [boston.gov/departments/inspectional-services/how-find-historical-permit-records](https://boston.gov/departments/inspectional-services/how-find-historical-permit-records). The calculation of gross floor area is a one-time step, necessary only in the first year of reporting.

### **WHAT IF MY WHOLE BUILDING IS RENTED BY A SINGLE TENANT?**

If your building has a single tenant who has assumed management, maintenance, regulatory compliance and/or capital improvement costs of the entire building, you and your tenant can agree to delegate reporting duties to the tenant. This delegation must be noted in the “Property Notes” section of Portfolio Manager and noted in the “anything else to report” section in the BERDO Reporting Form.

### **ARE THERE ANY ENERGY USES THAT ARE NOT PART OF MY BUILDING'S ENERGY USE?**

Cell phone towers, radio masts, and any external billboards used for leased advertising space are not part of building energy use, and may be excluded if submetered.

### **ARE THERE ANY WATER USES THAT ARE NOT PART OF MY BUILDING'S WATER USE?**

Only fire pipe/emergency water usage may be excluded from your building's water usage.

### **WHAT IF THERE IS SPLIT OWNERSHIP OF THE BUILDING?**

The primary owner listed in the records of the Boston Assessing Department is responsible for compliance with all aspects of the ordinance.

### **HOW ARE DATA CENTERS REPORTED IN PORTFOLIO MANAGER?**

Portfolio Manager defines a data center as a space “specifically designed and equipped to meet the needs of high density computing equipment such as server racks.” You can add a data center as a property use type. To receive an Energy Star score for a data center, energy use must be measured at the output of the uninterruptible power supply. Data center energy use is reported as separate value in your energy and water report, so the data center does not affect your building's energy use intensity.

### **WHAT IF I GENERATE ELECTRICITY THROUGH ON-SITE SOLAR PANELS?**

You can enter this into Portfolio Manager when setting up your meters. Obtain data from your installer on the energy used, any energy exported out to the grid, and about any renewable

energy certificates generated. If you report your renewable energy generation and use accurately, it will be reflected in your building's greenhouse gas emissions.

#### **WHAT IF THE BUILDING IS UNDER CONSTRUCTION OR NEWLY BUILT?**

A newly constructed building, if it meets the threshold for being covered by this ordinance, is required to report its energy and water use and complete third-party verification for the first full calendar year after receiving a Certificate of Occupancy.

#### **WHAT IF I PURCHASED THE BUILDING IN THE PAST YEAR?**

Buildings that have transferred ownership are not exempt from reporting requirements. The reporting regulations require the seller to transfer to the new owner any information that has been collected for completing the next energy and water report.

#### **HOW MUCH WILL THIRD-PARTY VERIFICATION COST?**

The BERDO ordinance does not specify a rate for data verification. The cost of verification is determined between the building owner and the Qualified Energy Professional. In some cases, benchmarking and verification services may be included as part of a larger energy service offering. In other cases, the cost may be determined by the size and complexity of the building.

#### **WHAT IS SOURCE EUI? WHAT IS AN ENERGY STAR SCORE? HOW ARE THEY CALCULATED?**

Energy use intensity (EUI) is the building's energy use per square foot. Portfolio Manager typically shows a building's Source EUI, which is a complete assessment of the fuel required for operating the building, accounting for any losses during electricity transmission and distribution. When you see Weather Normalized Source EUI, this is an estimate of what the Source EUI would have been in a year with "normal" weather conditions. For example, in a very hot year, Portfolio Manager might estimate your Weather Normalized Source EUI to be lower than your actual Source EUI.

Energy Star score, or rating, is a percentile score, on a scale of 1-100, comparing your building's energy performance with that of similar buildings in the U.S. The score normalizes for climate, weather, building size, number of employees, and other operational factors. A score close to 100 indicates a very high-performing building.

# ADDENDUM: VOLUNTARY WASTE TRACKING AND REPORTING

Waste tracking is entirely voluntary and not required for compliance with BERDO.

## WHY TRACK WASTE?

Energy Star Portfolio Manager allows for the tracking of important environmental data beyond just energy. By reporting your property’s waste to BERDO, you can assist the City in measuring the effectiveness of your recycling program and other waste reduction efforts in your building. Through measuring and evaluating our current waste production, we can determine ways to reduce, repair and reuse various materials throughout the City while decreasing our greenhouse gas (GHG) emissions.

### **STEP 1:** *Collect data on your property’s waste production and disposal*

The most useful data in measuring waste reduction performance is trash and recycling tonnage. You can request an annual report of your building’s tonnage from your trash and recycling haulers. If you are not able to get tonnage reports, Energy Star Portfolio Manager can calculate tonnage based on the size of your trash and recycling containers and the frequency of their collections.

- Haulers should only be collecting full containers. Check to see if your containers are full for each collection. There is a cost savings opportunity when you recycle more, fewer trash pick-ups will be required.

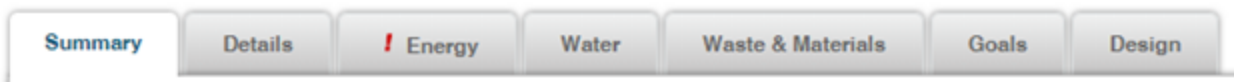
### **STEP 2:** *Log into your Energy Star Portfolio Manager account*

### **STEP 3:** *Select the property that you would like to report*

- The properties will be listed in your “Dashboard”

### **STEP 4:** *Set up your waste & materials in Portfolio Manager with the correct units*

- Click on the “Waste & Materials” tab within “MyPortfolio”



- Click on “Set Up Waste and Materials” or the “Add A Meter” tab
- Select the type of waste or material that you would like to report
- Select how you are disposing of and tracking the waste or material
- Select how often the waste or material is being collected
  - If you are aware of the weight or volume of your waste, please make sure to select the correct unit
- Select how you are tracking the disposal of the waste or material
- Select the “Create Meter(s)” tab

**STEP 5:** Enter your monthly waste disposal data

Note that entering costs is not necessary. Always check to make sure your units are correct and click “Continue” when you’re done.

- If you’ve received whole-building data from your trash and recycling haulers, these companies are providing data in a format that can be uploaded into Portfolio Manager in one easy step. Click on the “Browse” button for the meter, find the appropriate Excel file, and click “Upload”.
- If you’re entering data manually, click to add entries, one for each billing period. Remember that the data must encompass the full calendar year, without gaps. You can also enter any green power that you purchased, by checking the “Green Power” box and entering sourcing details.

Date	Quantity (Kilogram)	Cost (\$)	Estimated Value
<a href="#">Click to add an entry</a>			

[X Delete Selected Entries](#)  
[+ Add Another Entry](#)  
[📄 Learn how to copy/paste](#)

Upload data in bulk for this meter:

? You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

- After you have entered the data, click the “Add Meter Entries” tab
- Select the Waste and Materials Meters that you would like to include in your metrics and click the “Apply Selection” tab

Your waste and/or material meters have been created! If you have your meter entries ready, you can enter them below. Or, you can continue with setting up your meters and enter your meter entries later.

**STEP 6:** Continue reporting the rest of your building’s utility usage and submit your report to the City as described above in Step 6 of REPORT DATA THROUGH PORTFOLIO MANAGER.