



HOW TO CLASSIFY SENIOR CARE SPACE IN PORTFOLIO MANAGER

EPA's online energy management and tracking tool—Portfolio Manager—allows you to track and assess the energy performance of communities that house and provide care and assistance to elderly residents.

A senior care community is eligible to receive an ENERGY STAR score if at least 50 percent of the total number of residential units are considered assisted living and/or skilled nursing. Continuing care retirement communities with predominantly independent living units may be eligible to receive an ENERGY STAR score under this model if certain building characteristics are met. The following illustrations provide guidance on how to define a senior care property for energy performance benchmarking within Portfolio Manager.

Senior Care Communities Eligible to Receive a Score in Portfolio Manager

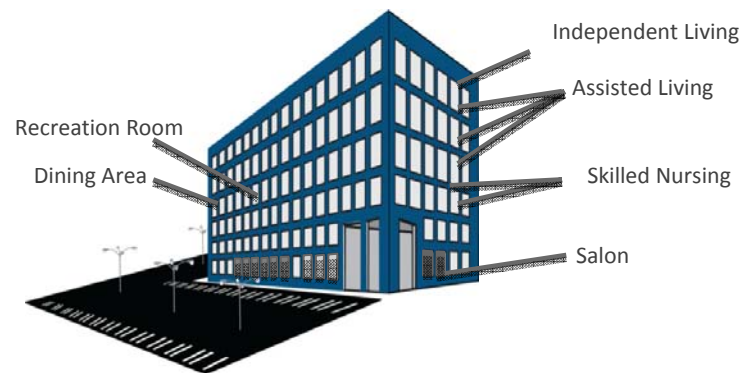
The graphics below depict the three ways in which a senior care community can be benchmarked using the ENERGY STAR energy performance scale.

A stand-alone senior care building where more than 50% of the units are assisted living and/or skilled nursing:

A senior care building may be a diverse space that includes independent living, assisted living, dementia care, skilled nursing, and common areas such as dining and recreational rooms.

At least 50 percent of the total number of residential units must be considered assisted living and/or skilled nursing to receive a valid score. Independent living must comprise less than 50 percent of the total number of units.

Select the senior care space type in Portfolio Manager and enter the total square footage and energy usage of the entire building.

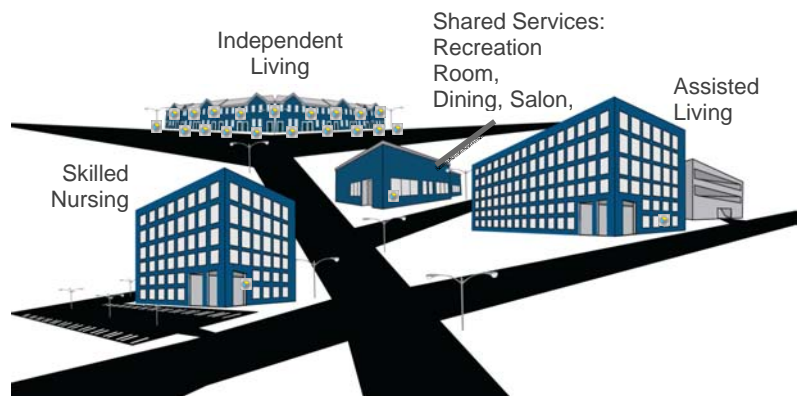


A multi-building community where more than 50% of the units are assisted living and/or skilled nursing:

A community includes all buildings that are connected by corridors or walkways in close proximity to one another.

At least 50 percent of the total number of residential units on campus must be assisted living and/or skilled nursing to receive a valid score. Independent living must comprise less than 50 percent of the total number of units.

Select the senior care space type in Portfolio Manager and enter the square footage and energy usage of all buildings on campus, including any individual electric meters that might be billed to specific independent living apartments.





PORTFOLIO MANAGER - SPACE CLASSIFICATION GUIDE

SENIOR CARE

A multi-building community where 50% or more of the units are separately metered independent living:

For communities in which 50% or more of the units are independent living (IL) but the IL buildings are separately metered stand-alone buildings, a valid rating can be generated only by fully excluding the IL buildings from the rest of the campus.

To properly enter the community in Portfolio Manager, aggregate the square footage and energy usage of all skilled nursing and/or assisted living buildings including buildings with support functions (e.g. offices, dining, recreation, common areas). The rating will apply only to that part of the campus.

Buildings that are used by all residents must be included in the benchmark.



Senior Care Communities NOT Eligible to Receive a Score in Portfolio Manager

Communities that are predominantly independent living and do not have separate or sub-meters:

If 50 percent or more of total units in a senior care community are independent living (IL) that are not located in a stand-alone building with separately metered energy use, then the community is not eligible to use the senior care space type in Portfolio Manager.

If more than 50 percent of the independent living units are located in a multi-tenant building (e.g. townhouse, condominium, apartment), communities should select the "Multifamily Housing" space type in Portfolio Manager to benchmark independent living buildings.

Buildings benchmarked as "Multifamily Housing" will not receive a score on a 1-100 scale, but the building will receive a weather-normalized energy use intensity. See [Multifamily Housing Quick Reference Guide](#) for more information.

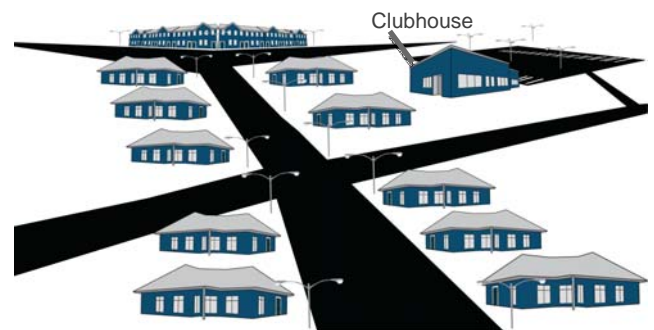


Residential retirement communities or villages:

If a retirement community or village is comprised of entirely residential homes and townhomes, it is not eligible to use Portfolio Manager.

If the community has already been built, it can use the [ENERGY STAR Home Energy Yardstick](#) for each individual home to assess energy performance and educate residents on energy savings opportunities.

If the community is still in the design phase, it can leverage the [ENERGY STAR New Homes](#) program and guidance on designing homes that qualify for ENERGY STAR for New Homes recognition.





Other Spaces Associated with a Senior Care Building or Community

While the majority of the space uses in a senior care building or community must be aggregated and classified under “Senior Care” (including office space, exam rooms, retail areas, etc.), there are three spaces that should be aggregated and classified separately within the property’s benchmark:

1. Parking Lots and/or Garages

If the property has parking lots and/or garages included in the energy use, enter the characteristics of the parking garage under the “Parking” space type, including gross square footage.

Note: If the parking or garage space is sub-metered, do not enter the square footage and energy use in Portfolio Manager.

2. Data Centers

If the property has a data center, enter the characteristics of this space under the “Data Center” space type. A data center is for sophisticated computing and server functions. It should not be used to represent a server closet or computer training area.

3. Swimming Pools

If the property has a swimming pool, enter the characteristics of this space information under the “Swimming Pool” space type.