

# Lessors Guidance on UCR Compliance

*If you do **not** have an existing Portfolio Manager account, click the following link to access the Portfolio Manager homepage where you can set up an account and follow the steps below: [Portfolio Manager](#).*

*If you **do** have an existing Portfolio Manager account, login to your account and connect with GSA by following the steps below:*

1. From Portfolio Manager, connect with GSA via [UCR@gsa.gov](mailto:UCR@gsa.gov)
  - a. To connect with [UCR@gsa.gov](mailto:UCR@gsa.gov) in Portfolio Manager:
    - i. Click **Contacts** in the top right hand corner
    - ii. Enter [UCR@gsa.gov](mailto:UCR@gsa.gov) and click **Search**
    - iii. Locate [UCR@gsa.gov](mailto:UCR@gsa.gov) and send **Connection Request**
  - b. After [UCR@gsa.gov](mailto:UCR@gsa.gov) accepts the connection request, it will show up on your list of connected contacts
2. Share your Portfolio Manager record with [UCR@gsa.gov](mailto:UCR@gsa.gov)
  - a. Go to the **Sharing** tab
  - b. Select **"Share (or Edit Access to) a Property"** button on the upper left hand side.
  - c. Select the properties you wish to share.
  - d. Select the [UCR@gsa.gov](mailto:UCR@gsa.gov) contact to share with GSA
  - e. Share the entire property record with **"Read-Only"** permissions
  - f. Select **"Share Properties"** to finalize
3. Add a Property and Enter Data: [EPA Portfolio Manager quick start guide \(PDF, 508KB\)](#)

Thank you for providing this utility information and for your participation in this GSA initiative. For questions related to this request, please contact [UCR@gsa.gov](mailto:UCR@gsa.gov).

## EPA PORTFOLIO MANAGEMENT RESOURCES

EPA offers training on a range of energy efficiency topics, including EPA Portfolio Manager guidance on improving building energy performance as listed below.

### *Basic Functionality*

- [An Overview of Portfolio Manager \(PDF, 832KB\)](#)
- [EPA Portfolio Manager quick start guide \(PDF, 508KB\)](#)

### *Data Entry*

- [How to get utility data into Portfolio Manager \(PDF, 567KB\)](#)
- [Watch Video: How to set up a property in Portfolio Manager](#)
- [Watch Video: How to set up energy and water meters in Portfolio Manager](#)

### *Sharing Data*

- [How to share properties with other users in Portfolio Manager \(PDF, 2MB\)](#)
- [Watch Video: How to share properties in Portfolio Manager](#)

## **Lessor Guidance for Recurring Reporting:**

Log in to your EPA Portfolio Manager account and enter monthly utility consumption data (including water use) on a quarterly basis through the end of the lease.

## **Lessor Guidance for Non-Compliance:**

***If you do not have an existing Portfolio Manager account,*** click the following link to access the Portfolio Manager homepage where you can set up an account and follow the steps above to connect with [UCR@GSA.gov](mailto:UCR@GSA.gov) and share your data.