

U.S. DEPARTMENT OF ENERGY SUSTAINABILITY DASHBOARD USER GUIDE

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Document Change History

| Version | Date | Description of Changes |
|---------|------------|---|
| 1.0 | 10/07/2014 | Initial publication. |
| 1.1 | 08/29/2016 | New pages, user roles and privileges, screenshot adjustments. |
| 1.2 | 09/19/2018 | Security updates, EISA modules, SSP module, metering updates, site profile page, process for historic data changes, screenshot adjustments. |
| 1.3 | 11/09/2021 | General updates |
| 1.4 | 10/16/2024 | Log-in instruction update, metering and facility goal category updates, SSP table addition, screenshot adjustments. |
| 1.5 | 11/5/2024 | Adding definitions for calculated fields. Updated Facility Goal Category fields. |

IMPORTANT NOTICE:

The DOE Sustainability Dashboard (Dashboard) is an unclassified system owned and operated by the Department of Energy. Dashboard users must strictly adhere to the security measures and internal controls that have been established. Access to the Dashboard is granted based on certain expectations. These expectations are referred to as the Dashboard's Rules of Behavior and are in accordance with the Office of Management and Budget (OMB) Circular A-130, Appendix III. The Office of the Chief Human Capital Officer (HC) expects each user to observe these rules when using the Dashboard ([Section 2.4 Rules of Behavior](#)).

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Chapter 1: Introduction

1. INTRODUCTION

The U.S. Department of Energy (DOE) is required to meet sustainability goals mandated by statute and related Executive Orders (E.O.), such as goals for energy and water use, fleet optimization, sustainable buildings, and renewable energy. Each year, DOE tracks performance and reports progress towards these goals by providing annual reports to the Office of Management and Budget (OMB), White House Council for Environmental Quality (CEQ), and Congress.

Since 2009, the Sustainability Performance Office (SPO) has utilized the Consolidated Energy Data Report (CEDR) in Microsoft Excel to collect DOE site-level sustainability data and consolidate these data sets on behalf of the Department. In October 2014, the SPO launched the web-based DOE Sustainability Dashboard (Dashboard) to serve the same functions as the CEDR with added analysis capabilities for DOE sustainability data reporting. The Dashboard maintains historical data sets for each DOE site and national laboratory and collects current year data, consistent with processes established for the previous years' reporting cycles. In addition, the Dashboard features analytics to provide DOE sustainability personnel with tools for managing sustainability at their site or within their program. Starting in FY 2016, the Dashboard became the official method of data reporting. The Dashboard is the required system for sustainability reporting according to [DOE Order 436.1A, Departmental Sustainability](#).

Development of the Dashboard will be an on-going process. The Dashboard has had various security upgrades, design updates, and page fixes in response to the helpful feedback provided by users. Additional features in the Dashboard may be added as needed. Revisions to this guide will be published as necessary. A list of Frequently Asked Questions (FAQ) compiled during each annual reporting cycle is also available on the **Supporting Resources** page of the Dashboard at <https://sustainabilitydashboard.doe.gov/>. For more information on the Dashboard or the DOE sustainability reporting process, please contact the Dashboard Team at sustainability@hq.doe.gov.

1.1 REPORTING PROCESS

The Dashboard will collect data needed to report DOE's progress on its sustainability requirements and serve as the official departmental sustainability reporting tool. Additional pages and general enhancements will be developed to collect additional sustainability data and improve overall system functionality.

To ease the burden of reporting all data elements during the year-end reporting cycle, the Dashboard will be open for data entry throughout the year, except during finalization of DOE's Fiscal Year snapshot from early December to early February. Key dates for reporting are updated annually and can be found in the **Schedules** page of the Dashboard.

Chapter 2: User Registration & Log In

2. USER REGISTRATION & LOG IN

DOE employees (Federal employees and contractors) with assigned duties to annual sustainability reporting may request access to the Dashboard. The following section outlines the account creation and initial log in process.

2.1 NEW USER REGISTRATION

To request a new account:

1. Access the DOE Sustainability Dashboard at: <https://sustainabilitydashboard.doe.gov/>
2. Click the **Register** tab in the upper right hand corner of the **Home Page**. You will be asked to enter your email address.
 - 2.1. If you previously set up an account, but have changed your email address, please contact the SPO Team to assign your account to your new email address.
3. Complete all required fields: "First Name", "Last Name", "Address", "E-mail", and "Phone."
4. Self-identify: "Employment Type" (*Federal or Contractor*), "Award Role(s)" (*Award Admin, Award DOE Approver, Award Validator*), "Role" (*Site User, Site Manager, Site Office, DOE HQ*), "Program Office", and "Site."
5. Select your "Primary Responsibility" from a data entry perspective (*Facility Management, Facility Asset Management, Fleet & Vehicle Management, Fleet Inventory Management, Fugitives & Refrigerants, Travel & Commute, Waste Management, Data Centers & Electronics, Procurement & Training, and Awards*). Please select only those that you will be responsible for. Those not selected will not be visible or editable by the user. If updates are needed, please contact the SPO.
6. The "Message for Administrator" field may be used to include important notes regarding your registration (e.g. add notes justifying your selection of Site(s) or Program(s)).
7. Before submitting your request, you must open, review, and agree to the Rules of Behavior, which is accessible through the link at the bottom of the page.
8. Select the "Submit Request" button at the bottom of the screen. A confirmation message appears. Click the "Finish" button.
9. Upon account approval, you will receive a confirmation email. Site administrators will work quickly to approve your account. If you do not receive an email confirming your request within 2 business days of submission, please contact SPO for assistance.
10. Click on the "Log In" button and select one of the follow methods to sign in:
 - Sign on with a Smart Card or Security Key: If you have a PIV card, a DOE PIV-D card, or a CAC, select the name of your card and enter your pin.
 - Sign on with a DOE site account: If you are from a DOE site, select your site and log in.
 - Sign on with another account: If you do not have a PIV card, log-in by creating a Login.gov or ID.me account.

To create a Login.gov account:

1. Select Login.gov.
2. Select the Create an account tab.



DOE - OneID is using Login.gov to allow you to sign in to your account safely and securely.

Sign in

Create an account

Create an account for new users

Enter your email address

3. Read the account creation requirements and instructions. Before creating your account ensure that you have the following pieces of information available:
 - DOE/Organizational Email Address
 - A 12-character password
 - Authentication Mechanism (Such as text message or a mobile application such as Microsoft authenticator, Google authenticator or Duo)
4. Enter your work email address (such as DOE Email address/organizational email address), select the preferred language, review and accept the Rules of use and click Submit.

Create your account

Enter your email address

Select your email language preference

Login.gov allows you to receive your email communication in English, Spanish or French.

English (default)

Español

Français

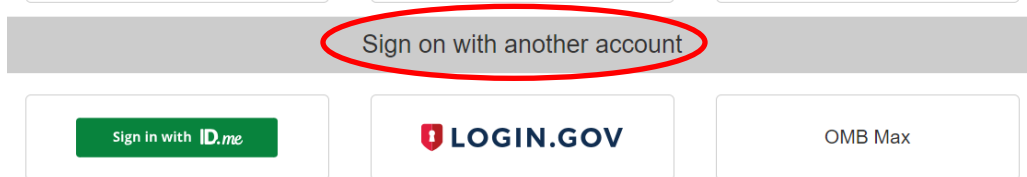
I read and accept the Login.gov [Rules of Use](#)

Submit

- A verification email will be sent to your email address; upon your review click the Confirm email address button.
- Create a strong password (Passwords must be at least twelve characters and should not include commonly used words or phrases).
- Add one or more authentication methods.
 - Authentication application (mobile application such as Microsoft authenticator, google authenticator or Duo)
 - Text Messages (add phone number to receive authentication code)
- You will be prompted to verify the selected authentication method. Once complete, you will be presented with a confirmation notice

After completing the registration on login.gov, you will need to first time verify your identity to access DOE applications through OneID.

1. Navigate to the [Dashboard Log In page](#).
2. Select Login.gov and authenticate with Login.gov credentials (username, password, and OTP/access code).



3. You will be redirected to Login.gov verification page, there you will be prompted to provide details from the following sources:
 - Non-expired government ID/driver's license
 - Social Security Number (SSN)
 - A phone number or home address

4. Select the Recommended option and follow the prompts.
5. Enter your Social Security number.
6. Verify your phone number and address.
7. Enter a personal phone number and select the contact method to receive the one-time verification code and click Send code.
8. Enter your Login.gov password to secure your account and click Continue to complete the verification.
9. You will receive a verification email.

Note:

Add your work email address to your login.gov account even if you initially signed up with different email address. This can be performed by accessing your account settings and selecting the option to add a new email address. Once added, you may need to verify the address before it can be used for authentication purposes.

If you cannot access the application, please contact the application administrator for access rights.

Instructions on how to sign up using ID.me can be found [here](#).

2.2 LOGGING IN

Registered users may follow the steps outlined below to access the Dashboard:

1. Select the following link to open the Dashboard: <https://sustainabilitydashboard.doe.gov/>
2. From the DOE Sustainability Dashboard **Home Page**, select the **Log In** drop down from the top right hand corner of the screen.
3. Click the “Log In” button.
4. Upon logging in, you will be required to “Agree” to the Security Notice. Please read the notice, and do not proceed if you do not agree with the terms.

Session Expiration: Your session will expire after 20 minutes of inactivity. Should this occur, you will need to log in again.

2.3 RULES OF BEHAVIOR

The Dashboard is an unclassified system owned and operated by the Department of Energy. Dashboard users must adhere strictly to the security measures and internal controls that have been established. Access to Dashboard is granted based on certain expectations. These expectations are referred to as the Dashboard’s Rules of Behavior and are in accordance with the Office of Management and Budget (OMB) Circular A-130, Appendix III. The Office of the Chief Human Capital Officer (HC) expects each user to observe the following rules when using the Dashboard.

- Authorized Access - All requests for access must go through the Dashboard login screen for authorization.
 - The Rules of Behavior must be acknowledged as part of the request for access.

- In the event that you no longer require access to the Dashboard, or you leave the employment of DOE or its authorized contractor organizations, you will notify the Dashboard Administrators to terminate your user account.
- You are to protect any information obtained from the Dashboard, whether in the form of printed reports or electronic files, against any purposeful or incidental distribution to anyone not authorized access to such data.
- Assignment and Limitations of System Privileges - Unless you are a privileged user, the privileges provided to you [the User] are adequate to perform the normal functions associated with the Dashboard.
- Remote Access - Primary access to the Dashboard is from the DOE Network using the Internet. When accessing the Dashboard from personally owned or provided hardware and/or information systems that have an internet connection and a browser, be sure the system has a current antivirus software with the latest virus definitions prior to accessing the Dashboard.
- Disposal of Information - Disposal of electronic and paper information shall be in accordance with federal and DOE policy and direction.
- Individual Accountability - Never share your logon credentials with anyone. Never leave logged on workstations unattended. Workstations unattended for 30 minutes or more must be paused. Do not enter classified information or Sensitive Unclassified Information (SUI), including Personally Identifiable Information (PII), into the system. When access to these IT resources is no longer required, notify the Dashboard Team and make no further attempt to access these resources.
- Limits on System Interconnection - All system changes, regarding the interconnections/interfaces with other systems, are under the strict control and approval authority of the DOE Information System Owner and therefore must be coordinated and approved prior to implementation into the production system.
- Information System Controls (with application logons) - The information system automatically terminates a logon session after 20 minutes of inactivity.
- Security Training - Every federal employee and contractor is required to take security awareness training upon employment and to take security refresher training annually.
- Reporting of IT Security Incidents - Any unauthorized penetration attempt or unauthorized system use, or virus activity will be reported to your supervisor in accordance with DOE M 205.1-1 (IPWAR Manual). Users should also report the security incident to the DOE Enterprise Service Center at (301) 903-2500 and EITS.ServiceDesk@hq.doe.gov.
- Consequences of Behavior Inconsistent with the Rules - Failure to adhere to these rules may constitute grounds for termination of access privileges, administrative action, and/or civil or criminal prosecution. Actions may range from a verbal or written warning, removal of system access for a specific period of time, reassignment to other duties, or termination, depending on the severity of the violation and the judgment of the appropriate authority.

2.4 USER PROFILE

User profiles contain basic information for each Dashboard user, including name, email address, phone number, physical address, employment type, role, sites, and DOE Program Office. This information is collected and stored when accounts are created and may be modified as needed. See [Section 2.1. New User Registration](#) for more information on creating a new account.

The descriptions of each field on the **User Profile** page follow:

- **Email** (fixed field): Automatically populated with the Email address entered during the registration process.
- **Username** (fixed field): Automatically populated based on the system generated user name during the registration process.
- **Address Fields** (Editable by the user): If entered during the registration process, these fields are automatically populated with the address entered.
- **Phone** (Editable by the user): Automatically populated with the Phone entered during the registration process.
- **Employment Type** (fixed field): Employment Type (Federal or Contractor) as selected during the registration process and confirmed by Program Office.
- **Role** (fixed field): Populated with your role (Site User, Site Manager, Site Office, and/or DOE HQ) as selected during the registration process and confirmed by Program Office.
- **Award Role(s)** (fixed field): Populated with your role (Award Admin, Award DOE Approver, Award Validator) as selected during the registration process and confirmed by Program Office
- **Program** (fixed field): Populated with your Program Office(s) as selected during the registration process.
- **Site** (fixed field): Populated with the Site(s) selected during the registration process and confirmed by Program Office.

- **Primary Responsibility** (Fixed field after registration): The field designates the primary responsibilities for reporting and selected by the user during the registration process. These responsibilities correlate with the data categories as follows:

| Primary Responsibility | Data Category |
|----------------------------|---|
| Facility Management | Energy, Water, On-Site Clean & Renewable Generation Systems, Purchased Clean and Renewable Energy |
| Facility Asset Management | Facility Goal Category, Sustainable Buildings, Metering, EISA S432 Benchmarking, EISA S432 Evaluations, New/Major Renovation Building Design |
| Fleet & Vehicle Management | Fleet Vehicle Fuel, and Mileage, Non-Fleet Vehicles & Equipment Fuel |
| Fleet Inventory Management | Fleet Vehicle Inventory |
| Fugitives & Refrigerants | Fugitives & Refrigerants, Adaptation & Resilience |
| Travel & Commute | Air Travel, Ground Travel, Commute |
| Data Centers & Electronics | Electronics Acquisition, Electronics Operations, Electronics End-of-Life |
| Procurement & Training | Sustainable Contract Review (<i>not active</i>), Adaptation & Resilience, Efficiency & Conservation Measures, Training & Education, Appropriations & Direct Obligations, Policies |
| Waste Management | Municipal Solid Waste, Waste Diversion, Wastewater Treatment |

- **Save Button:** Saves the information entered.
- **Delete Button:** Displays a message confirming that you want to delete this user.
- **Cancel Button:** Cancels the information entered and closes the user profile screen.
- **Request Change Button:** Use this button to request change(s) to fixed fields. When prompted, provide a description and justification for your request. Enter additional email addresses to copy other individuals on your request to the system administrator, separating addresses with a semi-colon.

Note: You can only view the Data Categories that correlate to the Primary Responsibilities that you selected when creating an account. If you need access to additional categories, please contact the Dashboard Team.

2.4.1 Access & Privileges

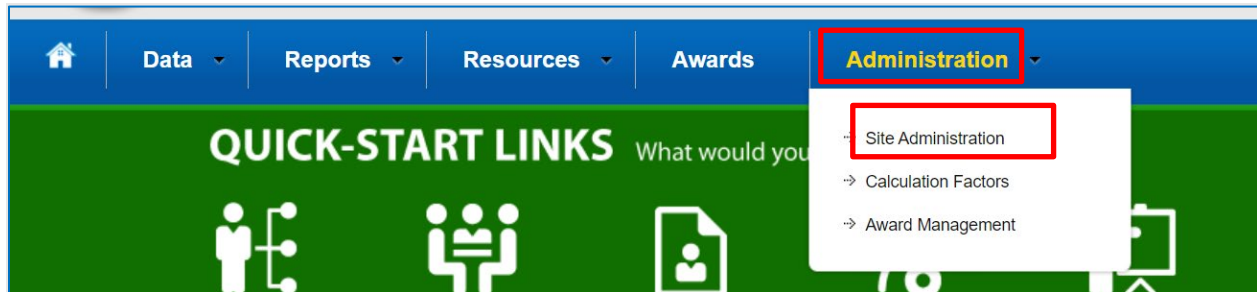
Users' access privileges vary, depending on the approved DOE Sustainability Dashboard user profiles. Users' access will be limited to their primary responsibilities and user rights. For example, site users may view the performance of each site that they are assigned to, including

aggregated performance for associated HQ Program, Under Secretary, and DOE overall. If you have questions about your access privileges, contact the Dashboard Team.

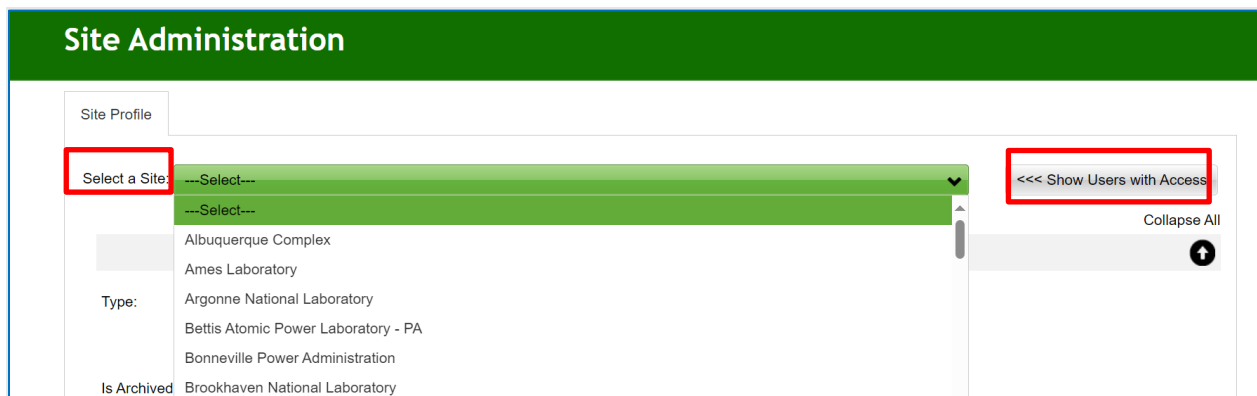
2.4.2 User Roles and Rights

To view the list of users who have access, their roles and responsibilities, and other general information:

- From the DOE Sustainability Dashboard tool bar, select “Administration,” then “Site Administration”



- Choose your site from the drop down and select “Show Users with Access.”



The table below summarizes the user roles and general access rights for each level of access to the Dashboard. Data sets will be protected according to user roles and program/site affiliation. **Note:** *Exceptions to the rights associated with each role can be accommodated if needed. If you have role/rights exception requests, please contact the Dashboard Team.*

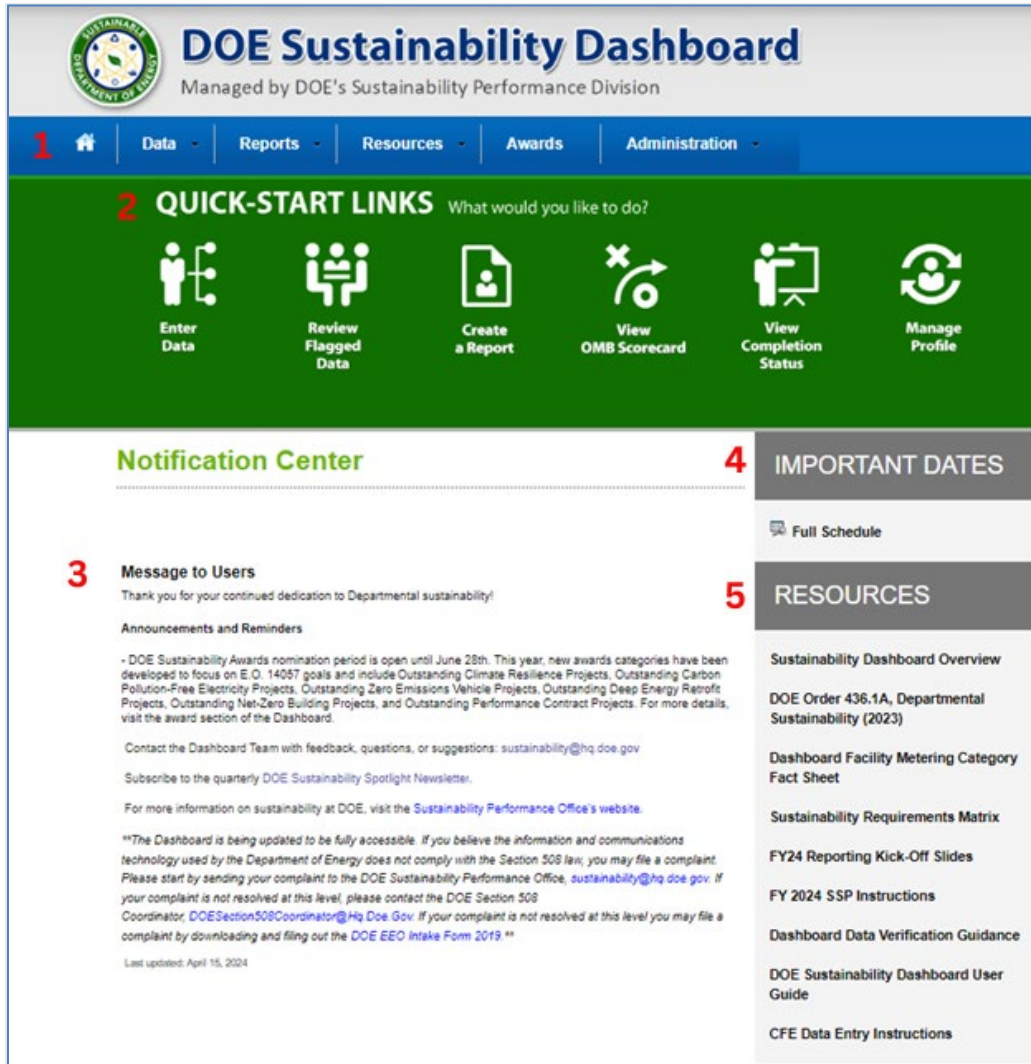
- **User Role:** Site User
 - Site level personnel with sustainability data reporting responsibilities. May be involved with one or many data categories (e.g., a site may have multiple Site Users, with separate responsibilities for energy, water, waste, etc.).
 - **General Rights:** Read/View and Write/Enter Data
- **User Role:** Site Manager
 - Site level personnel who oversee sustainability reporting for their site. Site manager reviews (approves/rejects) data sets submitted by Site Users and subsequently submits data sets for Site Office review. The Site Manager may also have sustainability data reporting responsibilities.
 - **General Rights:** Read/View and Write/Enter Data
- **User Role:** Site Office

- Site Office personnel responsible for overseeing the Management and Operation (M&O) contract for a site and approving data sets prior to submission to HQ.
- **General Rights:** Read/View and Approve/Reject
- **User Role:** DOE HQ
 - DOE HQ personnel, typically with responsibilities of overseeing and managing sustainability activities.
 - **General Rights:** Read/View and Approve/Reject

Chapter 3: Home Page

3. HOME PAGE

The Dashboard **Home Page** is divided into five sections: Top Navigation Bar, Quick-Start Links, Notification Center, Important Dates, and Resources.



1. **Top Navigation Bar**—the top navigation bar (in blue) allows the user to navigate through the Dashboard and is described below:
 - **Home Page** is represented by an icon that resembles a house and results in a return to the Home Page.
 - **Data Menu** provides the ability to Enter Data, view QA/QC modules, create your Site Sustainability Plan, and review the Completion Status.
 - **Reports Menu** presents options to view the OMB Scorecard, Comprehensive Scorecard, Performance Graphs, Standard Reports, and Create a Report.
 - **Resources Menu** hosts the Dashboard user guide, reporting schedules, and helpful links to resources including statutes, Executive Orders, departmental orders, and best practices.

- **Awards Menu** contains your site's award submissions. Users can enter, view, and upload submissions and download templates.
 - **Administration Menu** allows the user to view and edit their Site Profile and view calculation factors.
2. **Quick-Start Links**—the Quick-Start Links icons provide quick access to key system functions. The links may also be accessed through the top navigation bar (in blue).
 3. **Notification Center**—this section provides the user with important notifications, including system settings and maintenance, as well as user-specific messages, such as required actions (data entry, approval, etc.).
 4. **Important Dates**—this section communicates important dates, including reporting schedules and deadlines for submitting data.
 5. **Resources**—this section includes links to important documents such as the DOE Sustainability Dashboard User Guide and the Guidance for DOE Site Sustainability Plans.



Chapter 4: Resources Module

4. RESOURCES MODULE

DOE is required to meet sustainability goals mandated by statute and related Executive Orders, such as goals for energy and water use, fleet petroleum use, sustainable buildings, and clean energy. Each year, DOE tracks performance and reports progress annually towards these goals to OMB, CEQ, and Congress.

4.1 SCHEDULES PAGE

The **Schedules** page hosts the current FY reporting schedule, as well as training opportunities and key dates for data verification. To collapse the schedule, click on the up arrow icon in the upper right corner of the table. To view the schedule, click on the down arrow icon in the upper right corner.

| Schedules | | |
|---|-------------------------------|---|
| Collapse All | | |
|  | | |
| Reporting | | |
| Date(s) | Title | Action/Event |
|  | | |
| Verification | | |
| Date(s) | Title | Action/Event |
| July 30, 2021 | Verification Selection Notice | SPD notifies Programs Offices and Sites of selection for verification process. |
| September 21, 2021 | Verification Training | Training on best practices for verification documentation. Recommended for sites that have been selected to provide verification documentation. Tuesday, September 21, 2021 1:00 pm - 2:00 pm EST Dial-in: 415.527.5035 Access Code: 199 812 2227 Password: Y8TICrpg3a2 URL: https://doe.webex.com/doe/j.php?MTID=m40423417ef30e725c0e1f00a30c584e2 |

4.2 SUPPORTING RESOURCES PAGE

The **Supporting Resources** page hosts the Dashboard user guide, reporting schedules, and helpful links to resources including statutes, Executive Orders, departmental orders, and best practices.

To access the **Supporting Resources** home page, click on the **Resources** tab in the top navigation bar.

Select one of the following options to view supporting resources:

- Reporting Files
- Training Files
- Statues
- Executive Orders + Presidential Memos
- DOE Orders + Secretarial Memos
- Guides + Best Practices
- Other

To filter resources *by SSP Category*, click the drop-down, and choose from the following SSP categories:

- Energy Management
- Water Management
- Waste Management
- Fleet Management
- Clean & Renewable Energy
- Sustainable Buildings
- Acquisition & Procurement
- Measures, Funding, and Training
- Travel & Commute
- Fugitives & Refrigerants
- Electronic Stewardship
- Resilience

To sort resources, click the drop-down, and choose from the following options:

- None
- Alphabetically (A - Z)
- Alphabetically (Z - A)
- Chronologically (New – Old)
- Chronologically (Old – New)

Chapter 5: Administration Menu Overview

5. ADMINISTRATION MENU OVERVIEW

5.1 SITE ADMINISTRATION PAGE

The Site Administration Page is the central location for site information and user access management. The Site Administration Page is located under the Administration tab on the Home Page.

- **The Site Profile** - Site users can select a site from the drop-down menu to view the Site Profile. Users will only see Site Profiles for sites they have access to. This page contains basic information including site address and location within the organizational structure. The Review Levels section (highlighted below) refers to the chosen levels of approval for your site (see [Section 2.5.2](#)). If approval levels or other information needs to be adjusted, please use the “Request Change” function at the bottom of the page.

The screenshot displays the Site Profile page. At the top, there is a 'Select a Site' dropdown menu with 'Headquarters - Forrestal' selected. To the right of this menu is a button labeled '<<< Show Users with Access', which is highlighted with a red box. Below the dropdown are sections for 'Site Profile' and 'Site Office', each with a 'Collapse All' link and an information icon. The 'Site Profile' section includes fields for Office Name (Headquarters), Address 1, Address 2, City, State (Please Select), and Zip. The 'Leadership' section includes dropdown menus for Lead DOE Secretarial Office (Under Secretary for Science), Lead DOE Program Office (Office of Management), and Cognizant DOE Program Office(s) (Please Select). A checkbox for 'Multi-program Site?' is checked. Below the leadership section is the 'Review Levels' section, which is highlighted with a red box. It contains four checkboxes: Site User, Site Office, Site Manager, and DOE HQ Program Office, all of which are checked. At the bottom of the page is a 'Notes' section with a text area and a 'Request Change' button.

From the Site Profile page, users can click on the “Show Users with Access” button on the right side of the page (see above screenshot) and a list of site users will appear below. Filters are available to sort by Program Office, Role, Access Type, User Status, and Employment Type. You can also search by name. Review the list of users to ensure the Users with access to the site should continue to have access and the rights assigned to them are correct. For adjustments to other User’s access to a site, contact the SPO.

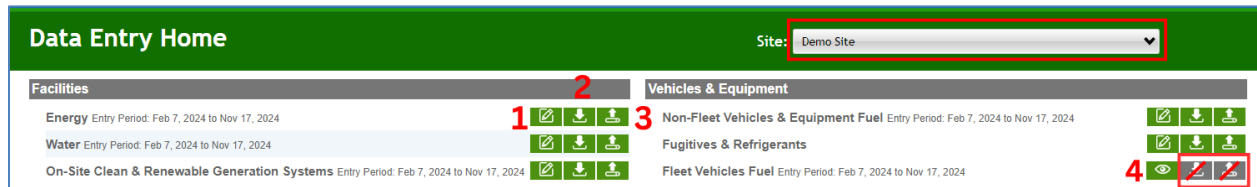
Chapter 6: Data Entry Module

6. DATA ENTRY MODULE

The following chapter covers the general mechanisms for entering sustainability data and tracking completion. Specific information on individual data entry pages is covered in [Chapter 11: Data Category Descriptions](#). For a detailed description of reporting requirements, refer to [Chapter 1: Introduction](#) of this *Dashboard User Guide* and the *DOE Site Sustainability Plan Guidance*.

6.1 DATA ENTRY HOME PAGE

To access the data entry home page, click on the **Data Menu** in the top navigation bar, and choose “Enter Data.” The Data Entry Home page lists all the data entry categories available to view or edit. See the image and descriptions below for details on accessing data entry pages, downloading templates, or uploading data.



Select a site from the drop-down menu on the upper right hand side of the screen (highlighted in red above). If you’re a site user, then only one site may be available for selection. Navigate to the desired data category and select the applicable icon, as defined below:

1. **Enter Data** – Enter sustainability data through the **Data Entry Module**. Refer to [Section 6.2.1 Enter Data](#).
2. **Download Template** – Download template for file upload (Microsoft Excel file). Refer to [Section 6.2.6 Get Upload Templates](#).
3. **Bulk Data Upload** – Upload sustainability data through file upload (Microsoft Excel file). Refer to [Section 6.2.7 Upload via Bulk Data Upload](#).
4. **View Only** – These categories are read-only and cannot be edited. Data has been pulled from other reporting systems (FAST or Portfolio Manager).

Note: Any gray icons with a red slash indicate that the function is not applicable/available for this data category.

Data Entry Module

The **Data Entry Module** allows users to enter data for each data category through a series of entry fields and drop-down menus. As current year data is saved to the Dashboard, a review table is generated on the right-hand panel to confirm successful data entry. When data entry is complete, Site Users submit complete data sets for Site Manager Approval.

In the examples below, the Energy data category within the Facilities data set is used to demonstrate the process of data entry. The process for the other data categories is identical in terms of major steps, although there are variations in the fields and menus for each data category. The following data categories have a slightly different data entry process: fleet vehicles modules, facility level modules, project level modules, and on-site renewables. Please note, fleet vehicle and benchmarking data are not open for editing and data must be reported in

FAST and EPA's Portfolio Manager, respectively. See [Chapter 11: Data Category Descriptions](#) for a detailed description of the data categories.

6.1.1 Enter Data

This section outlines the steps for entering data through the **Data Entry Module**.

From the **Data Entry Home** page, click on the *Enter Data* icon:

1. The **Data Entry Module** is displayed below for the Energy data category. You may navigate between data categories using the drop-down arrow to display the full list of categories.

1 Data Category Menu Site: Demo Site <<< View Full QA/QC

2 Facilities Energy Consumption and Cost

Site: Demo Site
PSO: D-Program
Site #: 105
Category: --Select--
Subcategory: --Select--
Main Site Zip Code: 20009
Square Feet:
Purchased or On-Site Generated Non-Renewable: Purchased
Data Entry Period Type: Fiscal Year by Quarter Fiscal Year by Month
Usage Unit: --Select--
Q1 (October - December) Amount:
Cost (\$):
Q2 (January - March) Amount:
Cost (\$):
Q3 (April - June) Amount:
Cost (\$):
Q4 (July - September) Amount:
Cost (\$):
Billing Reference (Optional):
Additional Information (Optional):

3 Save Energy Consumption and Cost Data

Reporting Year: 2024 Reset Options

To view details of an entry or request change(s), click Select in the table below. Note in some instances when directed here from the full QA/QC, the system cannot preselect and show details of the information in the data entry section.

| Has Comments | Subcategory | Category | Purchased/Fuel/Units | Usage | Cost | GHG | T&D |
|--------------|-------------|----------|----------------------|-------|------|-----|-----|
|--------------|-------------|----------|----------------------|-------|------|-----|-----|

4

2. Enter site data in the provided data entry fields.
3. Select "Save Energy Consumption and Cost Data" to save progress to the Dashboard.
4. As data is saved to the Dashboard, a review table (mini QA/QC) is generated on the right-hand side of the screen. The Dashboard arranges data in alphabetical order according to Subcategory. There is also an option to select the Year if you wish to review previous year data.
5. Once all data has been entered and verified by the site, Site Users may submit completed data sets for approval by selecting the "Complete Energy Consumption and Cost" button.

6.1.2 Revise Saved Data

After the data is saved to the Dashboard, it may be revised at any time prior to submission:

| Has Comments | Subcategory | Category | Purchased/Fuel/Units | Usage | Cost | GHG | T&D | |
|--|-----------------------------|-------------------------------|------------------------------------|-------|-----------|------------|----------|-------|
| <input type="checkbox"/> Select <input type="checkbox"/> Delete | Electricity | Target Goal Subject Buildings | Purchased Grid Megawatt Hour (MWh) | Q1 | 5,555.00 | \$1,678.04 | 1,813.87 | 92.82 |
| | | | | Q2 | 0.00 | \$0.00 | 0.00 | 0.00 |
| | | | | Q3 | 0.00 | \$0.00 | 0.00 | 0.00 |
| | | | | Q4 | 0.00 | \$0.00 | 0.00 | 0.00 |
| | | | | Total | 5,555.00 | \$1,678.04 | 1,813.87 | 92.82 |
| <input type="checkbox"/> Select <input type="checkbox"/> Delete | Liquefied Natural Gas (LNG) | Target Goal Subject Buildings | Purchased | Q1 | 4,557.00 | \$830.00 | 0.00 | |
| | | | | Q2 | 2,000.00 | \$678.00 | 0.00 | |
| | | | | Q3 | 3,000.00 | \$578.00 | 0.00 | |
| | | | | Q4 | 4,700.00 | \$900.00 | 0.00 | |
| | | | | Total | 14,257.00 | \$2,986.00 | 0.00 | |
| <input type="checkbox"/> Select <input type="checkbox"/> Delete | Natural Gas | Target Excluded Buildings | Purchased Million BTUs | Q1 | 23.00 | \$300.00 | 1.22 | |
| | | | | Q2 | 34.00 | \$400.00 | 1.80 | |
| | | | | Q3 | 47.00 | \$400.00 | 2.49 | |
| | | | | Q4 | 50.00 | \$500.00 | 2.65 | |
| | | | | Total | 154.00 | \$1,600.00 | 8.16 | |

1. To revise a data point, use the *Select* option to highlight one row in the mini QA/QC on the right hand side. In the example below, the row with the “Subcategory” of *Liquefied Natural Gas* has been selected. The data for the selected row will be repopulated in the data entry fields.
2. Data entered may now be modified through the Data Entry Module fields. Revise the data using the entry fields on the left-hand side. Click “Save <Data Category>” to save the changes to the data.
3. The corrected data will overwrite the previous entry and appear in the mini QAQC, as shown below.

| | | | | | | | | |
|--|-----------------------------|-------------------------------|------------------------------------|-------|-----------|------------|----------|-------|
| <input type="checkbox"/> Select <input type="checkbox"/> Delete | Electricity | Target Goal Subject Buildings | Purchased Grid Megawatt Hour (MWh) | Q1 | 5,555.00 | \$1,678.04 | 1,813.87 | 92.82 |
| | | | | Q2 | 0.00 | \$0.00 | 0.00 | 0.00 |
| | | | | Q3 | 0.00 | \$0.00 | 0.00 | 0.00 |
| | | | | Q4 | 0.00 | \$0.00 | 0.00 | 0.00 |
| | | | | Total | 5,555.00 | \$1,678.04 | 1,813.87 | 92.82 |
| <input type="checkbox"/> Select <input type="checkbox"/> Delete | Liquefied Natural Gas (LNG) | Target Goal Subject Buildings | Purchased | Q1 | 4,557.00 | \$830.00 | 0.00 | |
| | | | | Q2 | 2,000.00 | \$678.00 | 0.00 | |
| | | | | Q3 | 0.00 | \$0.00 | 0.00 | |
| | | | | Q4 | 4,700.00 | \$900.00 | 0.00 | |
| | | | | Total | 11,257.00 | \$2,408.00 | 0.00 | |
| <input type="checkbox"/> Select <input type="checkbox"/> Delete | Natural Gas | Target Excluded Buildings | Purchased Million BTUs | Q1 | 23.00 | \$300.00 | 1.22 | |
| | | | | Q2 | 34.00 | \$400.00 | 1.80 | |
| | | | | Q3 | 47.00 | \$400.00 | 2.49 | |
| | | | | Q4 | 50.00 | \$500.00 | 2.65 | |
| | | | | Total | 154.00 | \$1,600.00 | 8.16 | |

6.1.3 Reset Options Button

After entering data in the **Data Entry Module** or selecting a row in the review table, you may select “Reset Options” to clear the **Data Entry Module** fields (1). Another way to get a blank data entry form is to choose a data category on the data category navigation bar by selecting the Data Category Menu in the green header area above to main data entry (2). Data in the review table on the right hand panel will become unselected but will not be deleted.

6.1.4 Deleting Rows from the Right-Hand Panel

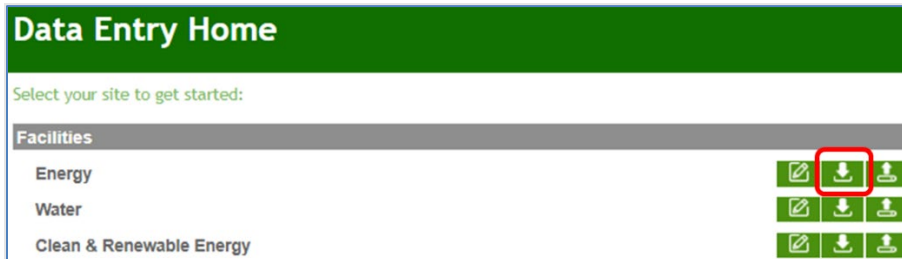
To permanently delete a single row from the Dashboard, select “Delete” for a specific row in the review table on the right-hand panel. You will be prompted to confirm your decision. Click “OK” to proceed, or “Cancel” if you do not wish to delete the row.

6.1.5 Complete <Data Category> Button

After current year data is entered and reviewed, Site Users may click “Complete <Data Category>” at the bottom of the screen to send the data to the next level of approval. After selecting “Complete <Data Category>”, a confirmation message will appear. **Note:** *By clicking OK you will be prevented from further modifying this data category. A pop-up message will appear asking if you are sure you want to complete this section. If a User wishes to modify the data, they should contact their Site Manager. Once the Site Manager rejects the data set, the user may edit the data in the Dashboard.*

6.1.6 Get Upload Templates

Users may input data to the Dashboard in two ways: (1) using the **Data Entry Module** (as described in [Section 6.1](#)) or (2) upload data using a Microsoft Excel Template. Keep in mind data cannot be uploaded for data that is pulled from other systems, such as FAST or FIMS. To download a template, select the *Download Template* icon to the right of the data category. Note that each data category has a customized template and not all data categories have templates available.



An example of the upload template for the Electronics Operations data category follows.

| 1 DOE Sustainability Dashboard - Electronics Operations Upload Template | | | | | | | | | | | | | |
|---|-----|--------|--|----------|-------------|--|-------------------------------------|-------------------------------|---|-------------------------------------|------------------------------|------------------------|--|
| 2 Site Information | | | Data Entry Information | | | Power Management | | | Duplex Printing | | | Additional Information | |
| 3 Enter site identifying information. | | | If Power Management is selected in Column E, choose "Computers" and/or "Displays" in Column F. If Duplex Printing is selected in Column E, choose "Printers, Copiers, MFDs" in Column F. | | | Enter data in this category only if "Power Management" was selected in Column E. | | | Enter data in this category only if "Duplex Printing" was selected in Column E. | | | | |
| 4 Site Name | PSO | Site # | Fiscal Year | Category | Subcategory | Number Owned | Number Exempt from Power Management | Number Using Power Management | Number Owned | Number Incapable of Duplex Printing | Number Using Duplex Printing | Additional Information | |
| 5 | | | | | | | | | | | | | |
| 6 | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | |
| 8 | | | | | | | | | | | | | |
| 9 | | | | | | | | | | | | | |
| 10 | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | |
| 14 | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | |
| 16 | | | | | | | | | | | | | |
| 17 | | | | | | | | | | | | | |

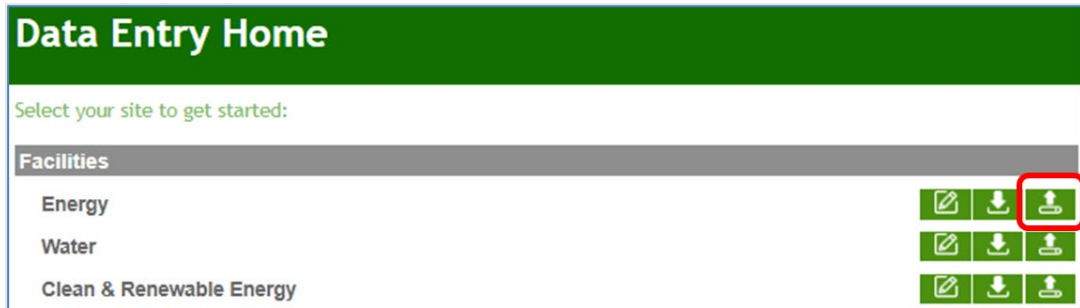
Notes:

- Please review any and all instructions provided at the top of the template, if applicable.
- Do not change worksheet tab names within the template. If the worksheet name is modified, the upload will fail. In this case, the tab/worksheet is by default named "EOperations."
- Drop-downs must be used when available. Manual data entry in these fields will not be recognized by the system.
- The Excel file name may be modified. For example, the Electronic Operations template is named "EOperations.xlsx" by default. This may be modified to another name (e.g., Site_EOperations_FY24_Final.xlsx).
- The upload template only accepts data for the current year reporting cycle.

6.1.7 Upload via Bulk Data Upload

Data may be uploaded to the Dashboard using the upload template icon located in the **Data Entry Home**. Only current year data may be uploaded to the Dashboard. To perform changes to historical data sets, refer to [Section 7.3 Historical Data Change Requests](#).

1. From the **Data Entry Home** page, navigate to the desired data category.
2. Select the *Bulk Data Upload* icon.



3. The **Data Entry Upload** page appears.
4. Click "Browse" and select the completed template file from your computer.
5. Click "Upload." The Dashboard will notify you if the upload was successful.

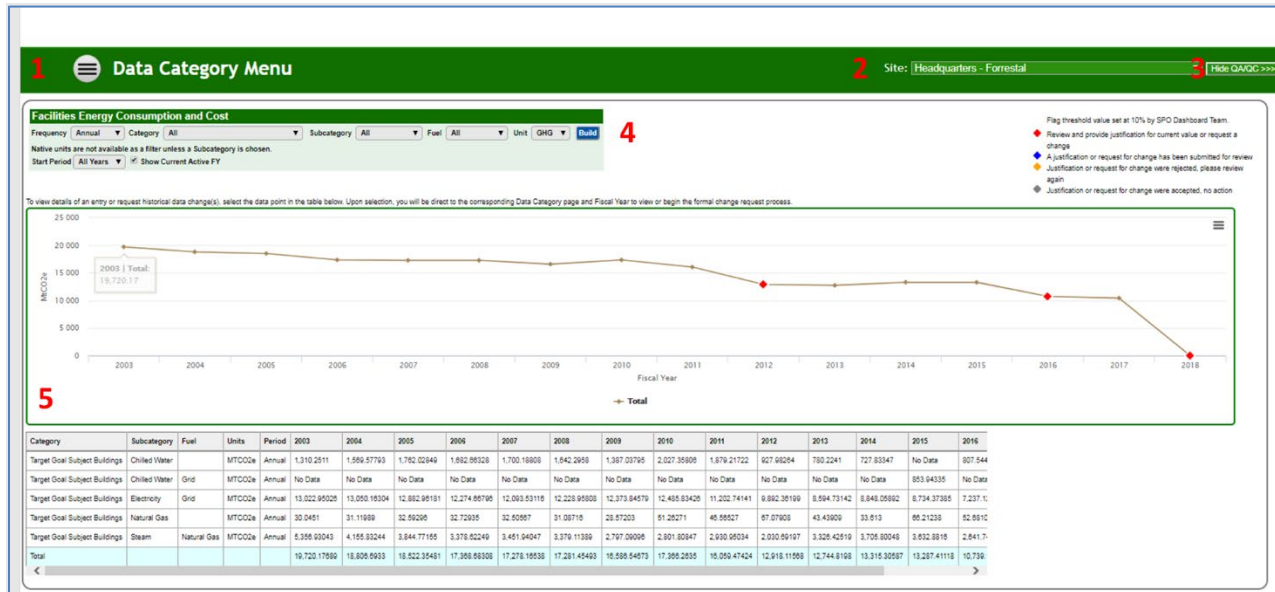
Chapter 7: Data QA/QC
Module

7. DATA QA/QC MODULE

The **Data QA/QC Module** is a way for users to view historical data and enables users to see trends and easily identify errors, anomalies, or significant data variances. It is recommended that users review data using the **Data QA/QC Module** prior to submission.

The Data QA/QC Module can be accessed in three different ways:

1. Click the “Review Flagged Data” Quick Start Link on the home page.
2. Navigate to the Data Menu and select “Data QA/QC”.
3. In the **Data Entry Module** for a given data category, click on the “View Full QA/QC” button in the upper right-hand corner of the screen.



Once the QA/QC option is selected, the appropriate **Data QA/QC Module** will appear. The **Data QA/QC Module** for the Energy data category is shown above with the five major parts of the **Data QA/QC Module** summarized below:

1. **Data Category Menu:** Press the menu button to display the data categories and navigate between QA/QC modules (see image below).
2. **Site Selection Drop-Down Menu:** This field provides a drop-down menu for selecting a site.
3. **Hide QA/QC Button:** This button toggles between the **QA/QC Module** and the associated **Data Entry Module** for that same category. Clicking this button on the **QA/QC Module** for Energy will take the user to the **Data Entry Module** page for Energy.
4. **Filters:** This area contains a series of drop-down menus that allows the user to refine the data being displayed in the area below it. Further explanation of the different filters is provided later in this chapter.
5. **Graphical Display Area and Associated Data Table:** As defined by the selection of the filters above, a graph appears based on the associated data table.

Note 1: Some “Units” filters will give the user the option to display data in “Native Units”. “Native Units” are the unconverted raw numbers entered by the site. Data may only be viewed as native units for some data categories.

Note 2: The system automatically sets flags year over year based on a threshold value set by the Dashboard Team. The threshold for each category is listed on the page.

The screenshot shows the 'Facilities Energy Consumption and Cost' dashboard. It features several filter dropdowns: Frequency (Annual), Category (Target Goal Subj...), Subcategory (Natural Gas), Fuel (All), and Data (Native). A 'Start Period' dropdown is set to 'All Years', and a 'Show Current Active FY' checkbox is checked. A green 'Build' button is present. A legend on the right side includes a red box around the text 'Flag threshold value set at 10% by SPD Dashboard Team.' and four items: a red diamond for 'Review and provide justification for current value or request a change', a blue diamond for 'A justification or request for change has been submitted for review', a yellow diamond for 'Justification or request for change were rejected, please review again', and a grey diamond for 'Justification or request for change were accepted, no action'.

7.1 DATA QA/QC FILTERS

The following section will explain the filters that are present on the Data **QA/QC Module**. Based on the data category selected, there will be slight variations in filter options.

This screenshot shows the same dashboard with filters adjusted. Frequency is set to 'Annual', Category is 'All', and Subcategory is 'All'. Fuel is set to 'All' and Data is 'GHG'. The 'Start Period' remains 'All Years' and 'Show Current Active FY' is checked. The 'Build' button is still visible.

As shown above, users may select from various drop-downs to filter the data, such as category and subcategory. You are able to adjust the starting period for the data you wish to view as well as chose to include or discount the current FY data.

When you have completed setting the filters to your desired configuration, click the “Build” button at the end of the filter row. This will prompt the **Data QA/QC Module** to calculate the data set that meets the requirements established by the filters and present a graph in the display area.

Note 1: QA/QC modules may not have an option to display the data in native units. This occurs when pages have different unit types. For example, the Energy QA/QC Module displays multiple data units (e.g., electricity in MWh and fuel oil in 1,000 gallons). As such, the **Data QA/QC Module** does not present an option to select native units until a “Subcategory” has been chosen.

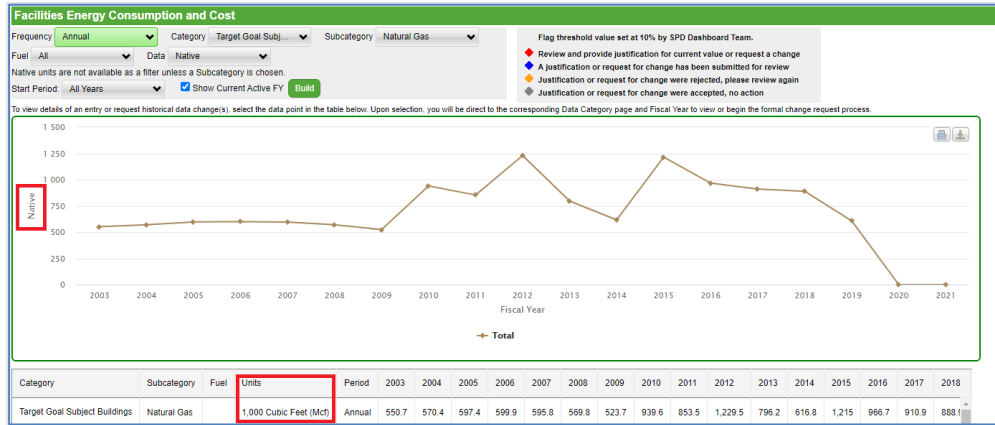
Note 2: Drop-down options in each filter are based on the data your site has entered, so there may be slight variations in filter options.

7.2 GRAPHICAL DISPLAY AREA AND ASSOCIATED DATA TABLE

The Dashboard offers the ability to examine historical and current data sets through trend analysis. This tool may be used to spot anomalies, errors, and data inconsistencies. If corrections are required, users may submit change requests for historical data sets. In combination, the graph and associated data table displays all data previously recorded (historical and current). Hovering over a data point on the graph shows the actual totals for a given fiscal year.

7.2.1 Native Units

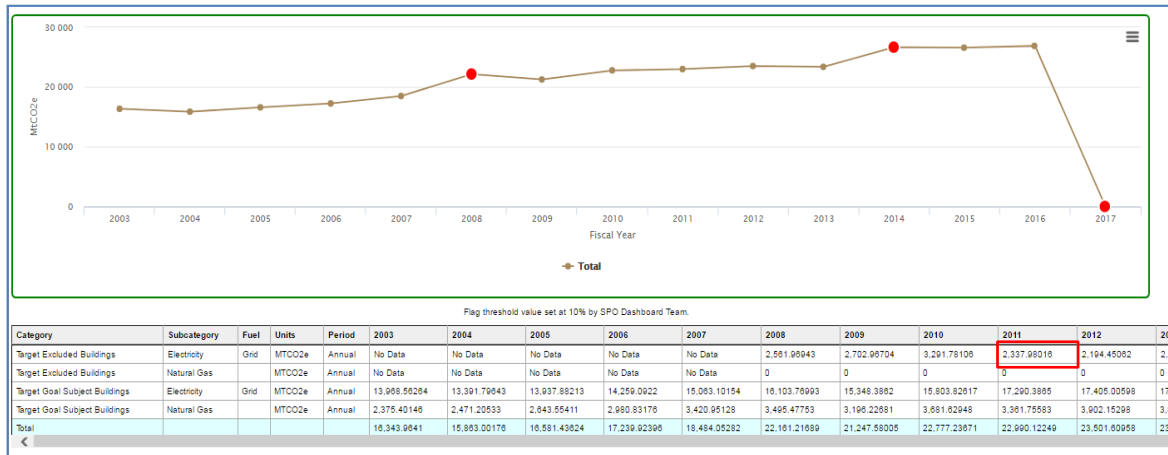
Where native units are applicable, the graph labels the Y axis (vertical axis) as “Native.” The associated data table below lists the “Units” entered for the periods (e.g., MWh, MtCO2e, and miles).



7.3 HISTORICAL DATA CHANGE REQUEST

Sites may submit requests to modify historical data sets. To initiate a historical data change request, follow the steps below:

1. From the QA/QC, select the value you wish to change from the table below the graph. You will be redirected to the Data Entry Page.



2. “Select” the row you would like to edit from the Mini QA/QC, the data will populate the entry form, but will be locked for editing.

Data Category Menu Site: Headquarters - Forrestal

Year: 2011

Facilities Energy Consumption and Cost

Site: Headquarters - Forrestal
 POC: BSA
 Site #: 2001
 Category: Target Goal Subject Buildings
 Subcategory: Electricity
 Main Site Zip Code: 20985
 Square Feet: 1810161
 Purchased or On-Site Generated Non-Renewable: Purchased
 Fuel/Material: Grid
 Transmission and Distribution (T&D) Losses (Optional):
 Date Entry Period Type: Fiscal Year by Quarter
 Usage Unit: Kilowatt Hour (KWH)

| Has Comments | Subcategory | Category | Purchased/Fuel/Units | Usage | Cost | GHG | T&D |
|--------------|---------------|-------------------------------|--|-------|-----------|------------|-----------|
| | | | | Q1 | 2,001.00 | \$45.71 | 74.69 |
| | | | | Q2 | 0.00 | \$0.00 | 0.00 |
| Select | Chilled Water | Target Goal Subject Buildings | Electric Driven Chiller Purchased Million BTUs | Q3 | 10,793.00 | \$393.32 | 428.72 |
| | | | | Q4 | 31,320.00 | \$716.72 | 1,175.64 |
| | | | | Total | 50,144.00 | \$1,145.75 | 1,679.02 |
| | | | | Q1 | 5,877.49 | \$873.66 | 2,743.11 |
| | | | | Q2 | 5,468.19 | \$51.29 | 2,541.97 |
| Select | Electricity | Target Goal Subject Buildings | Purchased Grid Megawatt Hour (MWH) | Q3 | 5,892.22 | \$693.90 | 2,842.02 |
| | | | | Q4 | 6,159.77 | \$694.03 | 2,975.64 |
| | | | | Total | 23,196.64 | \$2,702.75 | 11,202.74 |
| | | | | Q1 | 197.20 | \$2.17 | 8.58 |
| | | | | Q2 | 103.80 | \$1.27 | 5.66 |
| Select | Natural Gas | Target Goal Subject Buildings | Purchased 1,000 Cubic Feet (Mcf) | Q3 | 606.00 | \$5.58 | 27.61 |
| | | | | Q4 | 98.60 | \$1.06 | 4.72 |
| | | | | Total | 893.90 | \$10.38 | 46.87 |
| | | | | Q1 | 10,110.00 | \$393.51 | 994.22 |
| | | | | Q2 | 17,698.00 | \$897.68 | 1,738.21 |
| Select | Steam | Target Goal Subject Buildings | Purchased Natural Gas Million BTUs | Q3 | 1,820.00 | \$71.14 | 170.78 |
| | | | | Q4 | 191.00 | \$7.42 | 18.77 |
| | | | | Total | 29,922.00 | \$1,160.05 | 2,930.98 |

Create Change Request

3. Click the “Create Change Request” button at the bottom of the page to request a change. The data entry form will unlock and allow for edits (shown above).
4. Once you make the necessary changes to the data, use the text box under the “Send/Cancel Change Request” buttons to provide a justification (shown below).
5. You are required to provide *at least one additional email address* for a manager, site office, or headquarters official (see highlighted box below).

Send Change Request **Cancel Change Request**

All fields are required for change request submission unless otherwise noted.

User Change Justification/Comments:

Upload Supporting Documents (Optional): No file chosen

Additional Users to Email (e.g. Manager, Site Office, HQ PSO): Separate emails with a semicolon (;)

6. You may also upload documents to support your justification.
7. Use the “Send Change Request” to submit or the “Cancel Change Request” to cancel the request.
8. Once your request is submitted, you will receive an automated email confirming your request with an attachment detailing the requested changes. SPO and HQ program offices will review all change requests and follow up with sites directly, as needed. Once the change request has been accepted all related fields and calculations will be updated automatically.

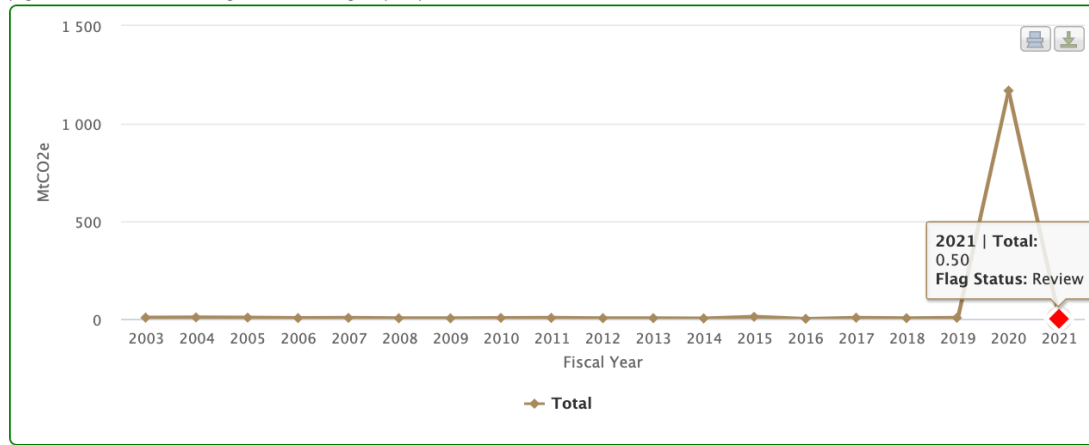
Note: Fleet and benchmarking data cannot be changed in the Dashboard. Fleet data changes can only be made in FAST and benchmarking in EPA’s Portfolio Manager.

7.4 FLAGGED DATA INSTRUCTIONS

Within the QA/QC graph, click on the red diamond. A text box will appear allowing you to add a justification for the flagged data. If the data are correct, write your justification and click “Submit Justification.” If you need to change the data, click “Request Change.”

accepted, no action

To view details of an entry or request historical data change(s), select the data point in the table below. Upon selection, you will be direct to the corresponding Data Category page and Fiscal Year to view or begin the formal change request process.



Flag Review

Status: Review
The data for this year has been flagged for review.
If the data is correct please use the area below to provide a justification.
If the data is incorrect, provide update(s) using the Request Change button.

Justification:

Supporting Document(s) (Optional):











Select

Submit Justification Request Change Close

Chapter 8: Site Sustainability
Plan Module

8. SITE SUSTAINABILITY PLAN MODULE

The Site Sustainability Plan (SSP) module was released in FY 2017 and revamped in FY 2021. Please reference the current SSP Guidance on the Dashboard Homepage for details on the required reporting topics. This section will give an overview of the functionality of the SSP Module, which is located under the Data Tab on the Dashboard Homepage. Select “Site Sustainability Plan” to be directed to the SSP Homepage. The SSP Homepage lists all Plan Documents by Reporting Year. This page should be used to view all historical SSPs, and sites can download available plans. To work on the current plan, click the “Edit” button (pencil) next to the corresponding reporting year.

| Site Sustainability Plan Home | | | Site: Headquarters |
|-------------------------------|----------------|--------------|---|
| Plan Documents | Reporting Year | Last Updated | |
| No entry for this year | 2024 | |  |
| No entry for this year | 2023 | |  |
| No entry for this year | 2022 | |  |
| No entry for this year | 2021 | |  |
| No entry for this year | 2020 | |  |
| No entry for this year | 2019 | |  |
| No entry for this year | 2018 | |  |
| No entry for this year | 2017 | |  |
| No entry for this year | 2016 | |  |
| No entry for this year | 2015 | |  |

Once you access the current reporting year’s SSP, the narrative categories will appear. Descriptions are included below for details on accessing categories as well as downloading and uploading templates for the SSP.

Site Sustainability Plan Home Site: **Headquarters**

| Categories | Add custom category | Complete SSP | Last Updated | Back | Download Draft Plan | Reporting Year: 2024 |
|--|---------------------|--|---------------------------|------------------------|---------------------|----------------------|
| Executive Summary | | <input type="checkbox"/> Mark Complete | No entry for current year | Plan Documents | Zip File Order | Last Updated |
| Energy Management | | <input type="checkbox"/> Mark Complete | No entry for current year | No records to display. | | |
| Water Management | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Waste Management (Optional) | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Fleet Management | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Clean & Renewable Energy | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Sustainable Buildings (Optional) | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Acquisition & Procurement | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Investments, Improvement Measures, Workforce & Community | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Indirect Emissions (Optional) | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Fugitives & Refrigerants | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Electronics Stewardships & Data Centers (Optional) | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |
| Adaptation & Resilience | | <input type="checkbox"/> Mark Complete | No entry for current year | | | |

Button Descriptions

- Add Custom Category:** This option allows you to add a new, customized category if you wish to include a detailed narrative on a topic not covered under the provided categories. This is an optional function, and no custom categories are required.
- Icons (Edit, Upload/Download Templates, Roll Over Projections):** The Edit and Upload/Download Template icons are consistent with the Data Entry Homepage icons. The pencil will direct you to the narrative entry page for the respective category. The up and down arrows should be utilized if you wish to use a Template to populate a narrative category. The gear/cog should be utilized if you wish to roll over projection data from the prior year and is only available for categories in which projections are requested.
- Mark Complete:** After completing and finalizing a section, check the box to mark it as complete. Note, all boxes must be checked to submit the plan.
- Last Updated:** This column shows users who last edited a category and when it was last updated.
- Download Draft Plan:** Allows users to download a copy of the plan at any point throughout the drafting process. Note, once the plan is complete this will no longer state “draft”.
- Complete SSP:** When you have completed all the narrative sections, you must submit your SSP for review/approvals using this button (see [Section 8.7](#)).
- Plan Documents:** All documents uploaded within each section of the SSP will appear in a list for easy access.

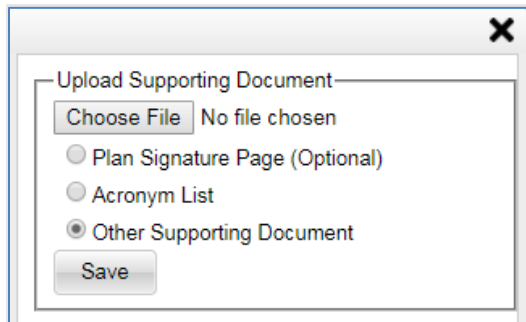
Note: Sites with multiple locations should only create one SSP under the Site’s Name.

8.1 SSP MODULE: EXECUTIVE SUMMARY

The Executive Summary narrative and table are required for the SSP. Please limit the length of the narrative to 1-5 pages. If you wish to include an Acronym List and/or a Plan Signature page, upload them to the Executive Summary page as supporting documents. The executive summary table, acronym list, and plan signature page are not included in the page limit.

Within the Executive Summary page of the SSP Module, use the text boxes to write the Executive Summary narrative and fill in the current FY efforts, planned efforts, and overall risk of non-attainment for the Executive Summary table.

To add an Acronym list or Signature page click the upload icon in the Supporting Documents section to the right of the Executive Summary narrative. See the pop-up window below for options. Select the file you wish to upload, choose its designation, and click save.



Note: Signature pages and Acronym Lists must be a Word document.

8.2 SSP MODULE: NARRATIVE CATEGORIES

This section will review the different functions available to users in the SSP narrative categories. The Energy Management category will be used as an example, but each category is set up in a similar way with the same functionality.

Each category will have four text boxes as described below:

1. **Performance Status:** Describe major initiatives or changes to missions or facilities that contribute in significant ways to each category area; and share success stories, accomplishments, lessons learned, and best management practices.
2. **Plans and Projected Performance:** Discuss your future plans and activities (e.g., mission changes, conservation measures, renewable energy systems, new construction or deactivation and decommissioning (D&D), policy and procedures updates, training), milestones, and expected performance for future years (i.e., 3-5 years), along with other relevant information or upcoming initiatives.
3. **Notes:** Write down notes, ideas, events, or reminders when drafting the SSP. Use this field throughout the year to prepare for reporting. These notes will NOT be included in the final plan.
4. **Comments:** Users with read only access may use this text box to provide comments and feedback for authors to consider when drafting the plan (e.g., site office users).

Below is a breakdown of the major parts of the narrative category pages.

1. Use the "Add Custom Section" button to add a create a new sub-section and save your progress by selecting "Save All Sections".
2. The text boxes provide the basic functions of Microsoft Word to create a document in the style and format of your choice. To insert tables, charts, graphs, or pictures simply copy (CTRL+C) the image and paste (CTRL+V) the image into the area you wish to display it.

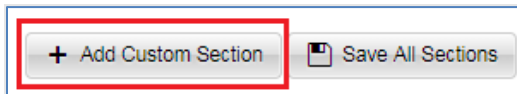
3. The Supporting Documents section allows you to upload supporting documents (e.g., Excel, Word, PDF, PPT) such as data workbooks, a Water Management Plan, or Fleet Management Plan.
4. The SSP Guidance section includes instructions for the respective category regarding the content that should be included.

The screenshot shows the Energy Management interface. At the top, there's a green header with the site name 'Headquarters - Forrestal' and the reporting year '2021'. Below the header, there are two main sections. The first section, 'Performance Status', is highlighted with a red box and a '1' next to the '+ Add Custom Section' button and a '2' next to the text editor area. The second section, 'Supporting Documents', is highlighted with a red box and a '3' next to it. The third section, 'SSP Guidance', is highlighted with a red box and a '4' next to it. The SSP Guidance section contains detailed instructions for reporting energy intensity, non-fleet fuel use, and associated GHG emissions, along with a list of key topic areas for consideration in bold.

8.3 ADDING SECTIONS

In this section, we will describe how to add/remove sections to a narrative category. Adding sections is an optional feature created to allow for greater flexibility in organizing your plan. Please note, you may only add up to five sections to a category.

Use the “Add Custom Section” to add a new section to your plan.



A pop-up window will appear with the following options:

1. **Name:** Enter the title of the sub-section.
2. **Sort Order:** If you are adding multiple sections, use this to change the order in which the sub-sections are presented. **Note:** *The sub-sections will automatically follow the main narrative category. If you do not change the sort order, the sub-sections will be organized in the order of creation.*
3. **Active Checkbox:** Leave this box checked to include the sub-section in the SSP narrative. If you wish to exclude/delete this sub-section, go to the Edit section and uncheck the box, then click Save. **Note:** *If you uncheck the box and save, you will lose the section and any information in it.*

When you save a new section, it will appear below the main narrative section with the same text boxes as the main section. The “Edit Section” button shown below will direct you to the Add/Edit Custom Section box described above.

8.4 SSP MODULE: TEMPLATES

Templates are available to populate the SSP Module.

Note: Each category has its own template. Please ensure the latest template is downloaded for the respective reporting year. It is the responsibility of the user to upload the template to the correct category. Should a user upload a template to an incorrect category, it is possible to overwrite a previous entry. Do not edit the titles or re-arrange the rows/columns on the template, this will cause an error for the upload.

To download a template, select the “Download <Category> Template” icon to the right of the narrative category. The templates are Microsoft Word files.

An example template for the Energy Management category is shown below. You may organize the narrative however you wish within the text boxes provided. Each template has five blank sub-sections, which are available for use if needed. Leave the sub-sections blank if you do not wish to include any additional sub-sections in the plan.

Utilize the fields below to address the SSP categories. Each category will need a separate template. Do not remove or adjust section breaks between tables, otherwise the template will not upload properly. When uploading a category template, it is the responsibility of the user to upload to the correct category. Should a category information be uploaded to an incorrect category, it is possible to overwrite it.

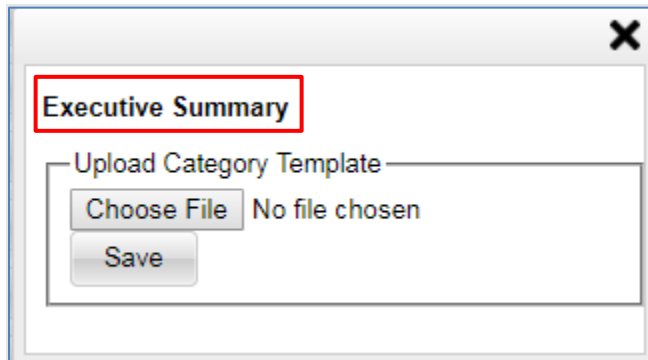
Tables, graphs, or graphics may be inserted. Structuring the category with separate sub-sections is optional. If creating a sub-section, please use the section tables below. Per category, no more than 5 sub-sections can be added. Finally, be sure to include a category title consistent with those in the Dashboard and section title of your own choosing.

Category: Energy Management

Performance Status: Discuss current FY performance by describing major initiatives or changes to missions or facilities that impact goal performance in significant ways along with other relevant information and details. Share success stories, accomplishments, lessons learned, and best practices. *If current FY performance data is consistent with the performance of prior years, is following the same trend as it has in prior years (no unusually large increases or decreases in performance of goals associated with the category), and the site has had no major initiatives or changes to missions relating to this category, enter "Yes" here: _____*

Plans and Projected Performance: Discuss plans and expected impact on future FYs along with other relevant information.

After populating a template, save the file to your computer and select the “Upload <Category> Template” icon next to the correct category. A pop-up window will appear to choose the file and then click save to upload the file. **Note:** Double check the category title on the pop-up window to ensure you are uploading the file to the correct category.



8.5 SSP MODULE: PLANNED PROJECTS

The “Energy Management” section of the SSP asks sites to record all planned new construction of all electric buildings, planned electrification retrofit projects, and planned deep energy retrofits between now and 2030. To add all anticipated performance contracts, navigate to “The Investments: Improvement Measures, Workforce & Community” section.

Sites should enter planned project data by clicking on the “Edit” button for the respective category on the SSP homepage. Once the desired section is selected, scroll down past the narrative text boxes and click “Add new record.”

Energy Management

Planned New Construction as All-Electric Buildings

Constructing new buildings to run entirely on electricity (i.e., no direct fossil fuel use for heating, cooling, cooking, etc.) will ensure they operate as net-zero buildings once the site transitions to carbon pollution-free electricity. Use the table below to identify any new buildings planned between now and 2030 that will be designed to run solely on electricity (list by individual building). Add additional records as needed to identify all such buildings.

| + Add new record | | |
|---|---|---|
| Anticipated Building Name or Descriptor | Estimated Building Gross Square Footage | Actual/Anticipated Construction Completion Year |
| No records to display. | | |

Planned Electrification Retrofit Projects

Electrification retrofit projects involve converting building systems that directly use fossil fuels to systems that use electricity. Examples include converting a fuel oil boiler for heating to an electric heat pump or converting a cafeteria's natural gas burning cooking equipment to all electric appliances. Use the table below to identify all building electrification projects planned between now and the end of Fiscal Year 2030 (listed by individual building). Note, only identify buildings that will be completely converted to electric (don't list any projects that will only electrify part of a building). Add additional records as needed to identify all such buildings.

| + Add new record | | | |
|------------------------|---------------|-------------------------------|---|
| FIMS RPUID | Building Name | Building Gross Square Footage | Planned Electrification Completion Year |
| No records to display. | | | |

Planned Deep Energy Retrofit Projects

Deep Energy Retrofits are projects that will reduce a building's energy consumption by at least 40% or more. These projects typically involve retrofits to multiple building systems to achieve such significant reductions. Examples include upgrades to entire HVAC systems, building automation systems, and lighting systems. Use the table below to identify all building Deep Energy Retrofits planned between now and the end of Fiscal year 2030. Add additional records as needed to identify all such buildings.

| + Add new record | | | |
|------------------------|---------------|-------------------------------|--|
| FIMS RPUID | Building Name | Building Gross Square Footage | Planned Deep Energy Retrofit Completion Year |
| No records to display. | | | |

The Investments: Improvement Measures, Workforce & Community

Planned Performance Contracts

Use this table to identify all anticipated performance contracts and add more rows as needed. For Contract Type, identify any Energy Saving Performance Contract (ESPCs), Utility Energy Service Contracts (UESCs), or Power Purchase Agreements (PPAs). For Expected Award Date, enter a year if you don't know the exact date. You may skip the Award Value and GHG Reduction fields if your site has not completed the performance contract preliminary assessment.

| + Add new record | | | |
|---------------------------|---------------------|---------------------------|---------------------------------|
| Performance Contract Type | Expected Award Date | Expected Award Value (\$) | Expected GHG Reduction (MTCO2e) |
| No records to display. | | | |

8.6 SSP MODULE: UPLOADING A DATA WORKBOOK

As the Dashboard is continuously being updated, certain data categories may require data to be submitted in an Excel workbook. Please review the latest SSP Guidance for instructions on which workbooks are applicable for the current fiscal year. These workbooks can be downloaded from the Dashboard's **Supporting Resources** page and instructions are available in the respective workbook.

Once complete, the workbook should be uploaded as a “supporting document” under the relevant category in the SSP Module. For instance, the Sustainable Acquisition Contracts and/or Biobased Product Purchases workbooks should be uploaded as “supporting document” under the Acquisition & Procurement section.

The screenshot shows the 'Site Sustainability Plan Home' interface. At the top, there is a navigation bar with 'Data', 'Reports', 'Resources', and 'Administration'. The user is logged in as 'charlotte.mendes'. The main heading is 'Site Sustainability Plan Home' with a dropdown menu for 'Site: Headquarters - Forrestal'. Below this is a table of categories. The 'Acquisition & Procurement' category has a red box around its edit icon. A 'Complete SSP' button is visible at the top right of the table area.

| Categories | | Complete SSP | Last Updated |
|---------------------------|-----------------------------------|--|---------------------------|
| Executive Summary | [edit] [upload] [download] | <input type="checkbox"/> Mark Complete | No entry for current year |
| Energy Management | [edit] [upload] [download] [gear] | <input type="checkbox"/> Mark Complete | No entry for current year |
| Water Management | [edit] [upload] [download] [gear] | <input type="checkbox"/> Mark Complete | No entry for current year |
| Waste Management | [edit] [upload] [download] [gear] | <input type="checkbox"/> Mark Complete | No entry for current year |
| Fleet Management | [edit] [upload] [download] | <input type="checkbox"/> Mark Complete | No entry for current year |
| Clean & Renewable Energy | [edit] [upload] [download] [gear] | <input type="checkbox"/> Mark Complete | No entry for current year |
| Sustainable Buildings | [edit] [upload] [download] [gear] | <input type="checkbox"/> Mark Complete | No entry for current year |
| Acquisition & Procurement | [edit] [upload] [download] | <input type="checkbox"/> Mark Complete | No entry for current year |

The screenshot shows the 'Acquisition & Procurement' section. It features a navigation bar and a 'Supporting Documents' section with a red box around the upload icon.

8.7 SSP MODULE: COMPLETING YOUR SSP

This section focuses on how to complete each section and submit the plan for final review and approvals.

Once you finish a section, check the Mark Complete box next to the respective category. After all the categories are marked complete then the “Complete SSP” button will activate. Once you click this button, the SSP Module will be locked, and you will not be able to make changes. If you wish to unlock the SSP, contact SPO, or have the next level approver reject the plan.

This is a close-up screenshot of the 'Mark Complete' checkbox for the 'Executive Summary' category, highlighted with a red box.

| Categories | | Complete SSP | Last Updated |
|-------------------|----------------------------|--|---------------------------|
| Executive Summary | [edit] [upload] [download] | <input type="checkbox"/> Mark Complete | No entry for current year |
| Energy Management | [edit] [upload] [download] | <input type="checkbox"/> Mark Complete | No entry for current year |

After submission, the **Completion Status Module** will show the approval levels for the SSP. Users with approval level access may approve the plan on the **Completion Status Module** or within the **SSP Module**. See [Section 9.2](#) for more details on the approval process.

Chapter 9: Data Submission & Approval Process

9. DATA SUBMISSION & APPROVAL PROCESS

This section explains the data submission and approval process. Details on the Completion Status Module, approval process, and certification letter requirements are located here. Once users have completed data entry, they must click the gold “Complete <Data Category>” button. This will notify the first level of approvers that data is ready to be reviewed.

9.1 COMPLETION STATUS MODULE

The **Completion Status Module** allows users to view the completion and approval status for each sustainability data category. There are several ways to navigate to the **Completion Status Module**:

- From the **Data Menu**, choose “Completion Status”
- From the **Home Page**, select the “View Completion Status” Quick-Start Link.

On the **Completion Status Module**, site users may access the following:

1. **Site Selection:** Users may scroll through the “Site” drop-down menu and select from their assigned sites.
2. **Reporting Period:** Users may choose to select past reporting years for reference.
3. **Document Upload:** You will see three documents that are available for upload/download per responsibility, including the Dashboard Data Accuracy Self-Certification Letter, Excluded Buildings Self-Certification Letter, and SPO Feedback Memo.
4. **Completion Status Table:** Users can view progress in each category during data entry and approval process. The Last Update column shows the Date/Time and User who was the last to update the given category.

The Completion Status Module allows users and management to track progress during the reporting period. Once the Site User submits the data for the Site Manager’s review, the data category is labeled as “Completed” with the submission date and site user’s name.

9.1.1 Completion Status Field Description by User

The status fields for the data collection and approval processes are explained below:

Input Status for Dashboard Users:

- **Not Started:** Site users have not begun to enter data into the data category.
- **In Progress:** Site users have begun to enter data in the chosen data category but have not submitted yet.
- **Completed:** Site users have submitted data. The submission date shown.
- **N/A:** Status not available for data categories pulled from other systems (fleet and benchmarking), categories with no historical and current data, and the policy tracker.

Input Status for Site Manager, Site Office, DOE HQ, and SPO:

- **In Progress:** Reviewers have received notifications that the data is ready for review. Reviewers are in the process of reviewing for approval or rejection or if necessary, editing the data.

- **Approved:** Reviewers have approved the data set. The approval date is shown.
- **Rejected:** Reviewers have rejected the data set. The rejection date is shown.
- **N/A:** Status not available for data categories pulled from other systems (fleet and benchmarking), categories with no historical and current data, and the policy tracker.

Note: For any Category that is grayed out on the **Completion Status**, no approval is needed.

9.2 APPROVAL PROCESS

All Dashboard users may go to the **Completion Status** page at any time and see the status of all the data categories for a particular site. Users who are the “Approvers” (Managers, Site Office, or HQ) may review data and approve or reject the submission through this page. As shown in the picture below, when a category has been completed, it will be marked “Waiting Review” with a checkbox next to it.

If the Site Manager would like to submit multiple approvals at once, they may select the checkboxes for the corresponding categories and click the “Approve All Selected Sections” button at the bottom of the page (highlighted in red). The checkboxes will then be replaced by the date the Site Manager approved/rejected the data and the name of the Approver. This will send an alert to the next level of approval that the data is ready for review, if applicable.

Sites need at least one level of approval by a manager beyond the site user who entered data. If this is not possible or creates an additional reporting burden, sites can complete the Dashboard Data Accuracy Self-Certification Letter provided on the **Completion Status** page (see [Section 9.3](#)). You can download the template, sign it, and upload the signed document back into the Dashboard for SPO Review.

Note: *Approvers must visit the individual data categories to reject or edit data.*

To review the data in more detail, prior to approving, click on the given category name. You will be redirected to the Data QA/QC Module for that category. At the bottom of the **Data QA/QC Module**, Approve or Reject buttons are displayed along with a comment field to explain the rationale for approval/rejection.

Refer to sections [6.2 Revise Saved Data](#) and [6.2.4 Deleting Rows from Right Hand Panel](#) for more information on revising or deleting data.

9.3 CERTIFICATION LETTERS

There are two different certification letters that sites should be aware of:

1. Excluded Buildings Self-Certification Letter
2. Dashboard Data Accuracy Self-Certification Letter

These letters can be downloaded from the Completion Status Module. The final signed document can then be uploaded to the Completion Status Module.

Please review the information below to determine if either letter is required for your site.

9.3.1 Dashboard Data Accuracy Self-Certification Letter

The Dashboard has an approval process (Completion Status Module) built into the system, allowing Site managers and HQ Program officials to certify the accuracy and completeness of the data submission. ***If certifying the data through the Dashboard approval process is deemed a burden based on site characteristics, Dashboard familiarity, or other challenge, Sites or Programs may verify Dashboard data submission with this self-certification letter.*** The self-certification letter is meant to maintain the integrity of the data submitted. The signed self-certification letter should be submitted through the Completion Status Module.

9.3.2 Excluded Buildings Self-Certification Letter

FEMP provides general guidance for identifying buildings that are to be excluded from the calculation of energy intensity for meeting the energy intensity reductions goals established by the Energy Independence and Security Act of 2007. Sites identify such buildings in the Dashboard by assigning the square footage portion of such buildings into the Energy Consuming Metered (Excluded) category.

The Dashboard will produce a final master Excluded Buildings List. Sites can download their Excluded Buildings List through the Standard Reports module under the Reporting Tab (See [Section 10.5](#)).

Note: Sites with GSA leased buildings **MUST** submit an Excluded Building Letter. The Self-Certification by the DOE Site Office serves as notification to DOE that the site management agrees that the buildings listed on the Excluded Buildings List meet the qualifications to be excluded from the calculation of energy intensity for the fiscal year.

Chapter 10: Reports Menu Overview

10. REPORTS MENU OVERVIEW

The Dashboard contains analytical tools and reports to assess performance against DOE's sustainability goals. The reports menu contains the following pages: **OMB Scorecard**, **Comprehensive Scorecard**, **Performance Graphs Module**, **Standard Reports**, and **Create a Report**.

10.1 FILTERS – OMB SCORECARD, COMPREHENSIVE SCORECARD, AND PERFORMANCE GRAPHS

Data presented on the OMB Scorecard, Comprehensive Scorecard, and Performance Graphs may be modified using the following filters. The filters can be utilized singularly or as a combination. The operation of these filters is described below:

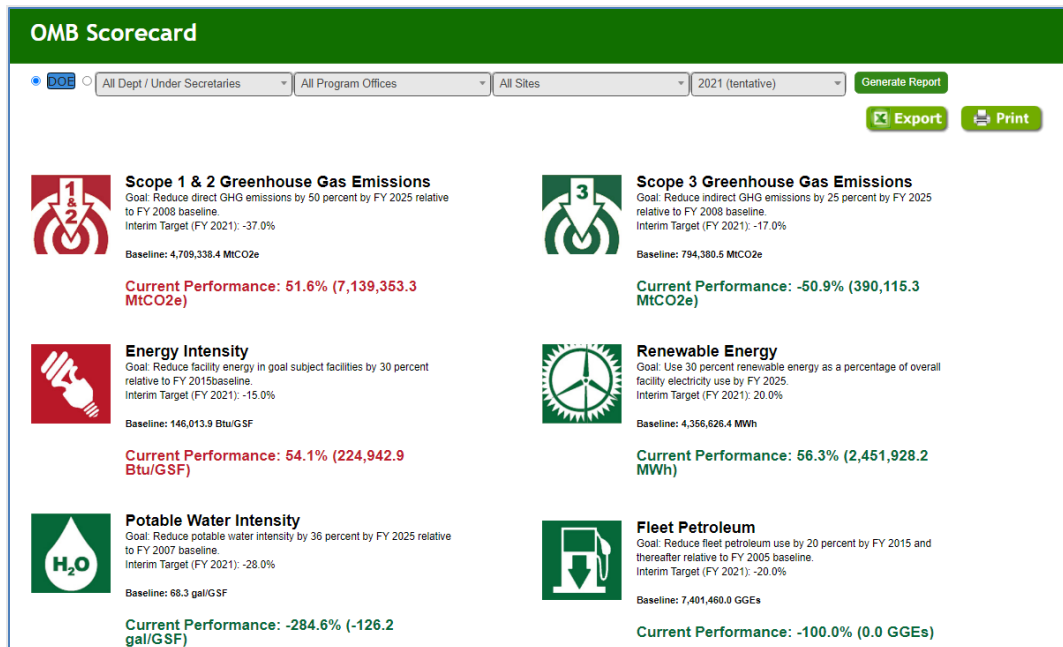
1. **DOE:** This button will clear all filters and display Department-wide performance only. This acts as a reset button to return the user to default filter settings.
2. **All Dept / Under Secretaries:** This filter presents sustainability data for all sites and offices under a particular Under Secretarial Element.
3. **All Program Offices:** At its default position "All Program Offices", sustainability data is presented for all DOE programs under the pre-selected Under Secretarial unit, as described above. Filtering to a specific Program will present that Program's sustainability performance.
4. **All Sites:** At its default position "All Sites", the user is shown sustainability data for all of DOE, or as described above, all sites under a selected Under Secretary or Program Office. Filtering to a specific Site will present that Site's sustainability performance.
5. **Year:** The most recent and approved FY serves as the default data. The drop-down menu may be used to view historical goal performance. The range of fiscal years available is determined by the data submitted by Sites in past year's reporting cycles.

***Note:** Users are limited in the areas described above based on access and privileges. For example, a Site User from one site will not have visibility into another site's (or Program's) data and performance. If you have questions about access privileges, please contact the Dashboard Team.*

10.2 OMB SCORECARD MODULE

The **OMB Scorecard Module** highlights DOE's performance against the measures of the annual targets. The sample table below indicates DOE's overall sustainability progress. The table is filterable by Under Secretary, Program, Site, and Reporting Year.

From the Top Navigation Bar, choose "OMB Scorecard" from the **Reports Menu**.



10.2.1 OMB Scorecard Goals

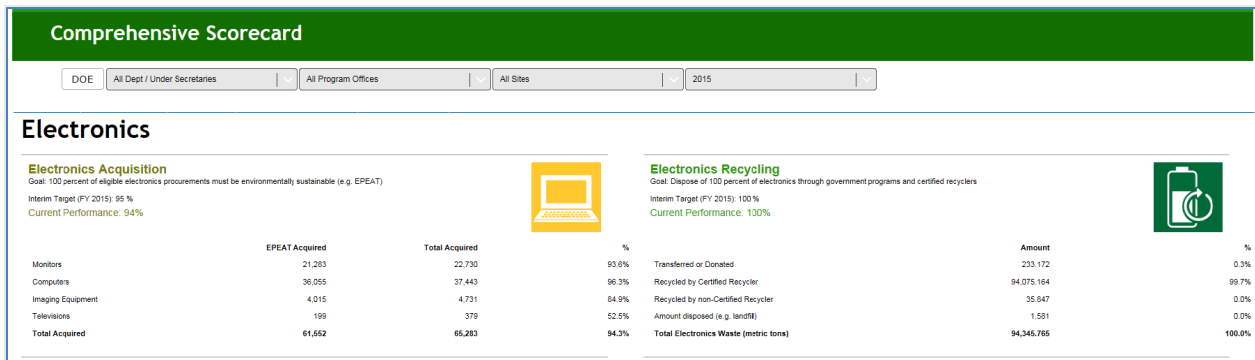
The **OMB Scorecard Module** provides a summary of progress towards goals on the annual OMB Scorecard. The Scorecard outlines specific interim goal targets developed by Office of Management and Budget (OMB) and the Council on Environmental Quality (CEQ). The colors of the icons on the Dashboard directly correlate with the Scorecard’s green/yellow/red scoring system.

10.2.2 OMB Scorecard Metrics

Each **OMB Scorecard** metric displays the goal icon, title of the metric, and three pieces of summarizing information. As mentioned previously, the colors (green, yellow, and red) signify the status towards achieving the goals. Green represents attainment of the annual target, red represents falling short of the target by more than one year relative to interim targets, and yellow is in between.

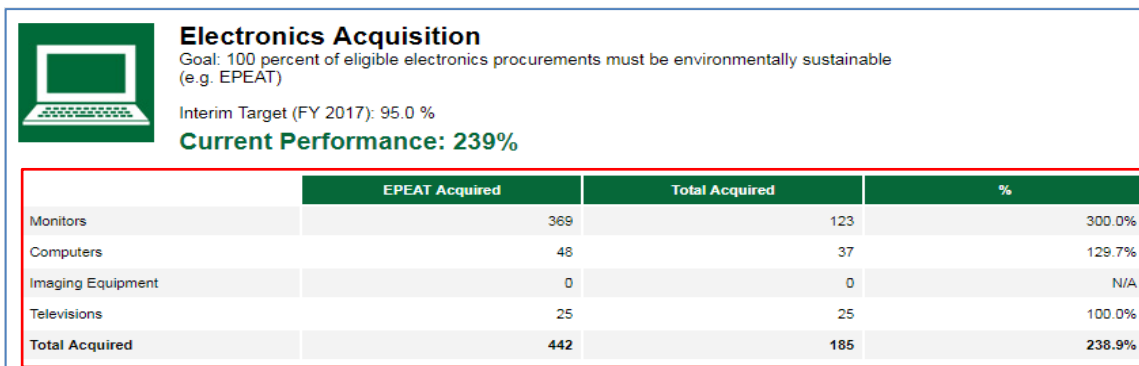
10.3 COMPREHENSIVE SCORECARD MODULE

From the Top Navigation Bar, choose **Comprehensive Scorecard** from the **Reports Menu**. The **Comprehensive Scorecard** provides a breakdown of the progress of each goal. The Comprehensive Scorecard includes additional goals not covered in the OMB Scorecard, such as Electronics Recycling, Duplex Printing, or Sustainable Acquisition. The image below shows the progress of Electronics goals as an example.



10.3.1 Comprehensive Scorecard Metrics

Each **Comprehensive Scorecard** metric displays the goal icon, title of the metric, and four pieces of summarizing information. As mentioned previously, the colors (green, yellow, and red) signify the status towards achieving the goals. An example summarizing DOE-wide Electronics Acquisition progress is provided below:



Goal: The goal is defined beneath the title. In this example, the goal is to have 100% of eligible electronics procurements be environmentally sustainable.

Note: Goals may vary across FYs based on DOE’s sustainability commitments in the annual Sustainability Plan, which is submitted to CEQ and OMB on a yearly basis. Please use the most current SSP guidance documentation for clarification.

Interim Target: The interim goal target is based on the OMB Scorecard. For this example, the interim target is 95% by FY 2015.

Current Performance: States goal performance through the selected Fiscal Year. The percentage value indicates performance against the baseline. In this example, DOE achieved a 94% procurement rate of environmentally sustainable electronics. This performance is scored “yellow” because it is just shy of the intended interim target of 95%.

Category Performance Breakdown: The screenshot above shows the breakdown of the goal performance for the Electronics Acquisition category. In the photo above, performance is broken down by EPEAT Acquired, Total Acquired, and Percent. The percent for each given electronic category represents the percent of acquired units that meet the EPEAT standard. for the current reporting year is subject to change until close of fiscal year reporting.

10.4 CREATE A REPORT TOOLS: STANDARD REPORTS & RAW DATA REPORTS

There are two different report options located under the **Reports Menu: Standard Reports** and **Create a Report**. Both options operate in a similar fashion, select your parameters and Export to Excel. The Create a Report page is shown in this section as an example.

Create a Report allows users to download raw data maintained by the system. **Standard Reports** allow users to generate more specific reports necessary in the reporting process, such as an Excluded Buildings List. Data is available for download in MS Excel format for each reporting category. The data may be filtered further by PSO, Site, Data Category, and Year. Users may select multiple options under each list by holding the shift or control key when selecting items.

Create a Report Select your parameters Export to Excel

Corporate / Under Secretary:

- All
- Demo Secretary
- DOE Corporate Office
- Power Marketing Administrations
- Under Secretary for Management & Performance
- Under Secretary for Nuclear Security
- Under Secretary for Science & Energy

CEDR Section:

- All
- Facilities - Energy
- Facilities - Water
- Facilities - On-Site Clean & Renewable Generation Systems
- Facilities - Purchased Renewables
- Facilities - Facility Goal Category
- Facilities - Sustainable Buildings
- Facilities - Facility Metering Status

PSO:

- All
- Demo Program
- Federal Energy Regulatory Commission
- National Nuclear Security Administration
- Naval Reactors
- Office of Energy Efficiency & Renewable Energy
- Office of Enterprise Assessments
- Office of Environmental Management

Year:

- 2022
- 2021
- 2020
- 2019
- 2018
- 2017
- 2016
- 2015

Site:

- All
- Albuquerque Complex
- Ames Laboratory
- Argonne National Laboratory
- Bettis Atomic Power Laboratory - PA
- Bonneville Power Administration
- Brookhaven National Laboratory
- Demo 55

10.4.1 Select Parameters

Reports may be customized through a series of selections. Users must select a parameter from each section prior to report generation.

A brief description of these fields is as follows:

- **Corporate / Under Secretary:** A typical site user will only be presented with a single option for this field, which is based on the sites you have access to.

- **PSO:** This field enables the user to select a Program Secretarial Office (PSO). Once selected, the subsequent fields will be further refined. For example, selecting *National Nuclear Security Administration* (NNSA) in this field refines the Sites options to only those under NNSA.
- **Site:** The options for selecting specific Sites for data download are based on the criteria selected in the “PSO” field above.
- **Data Category:** Data Categories may be selected singularly or in combination. Multiple selections can be made using the Shift or Control key.
- **Year:** This field allows selection from the FYs with approved data sets for the chosen sites.

10.4.2 Export to Excel

Once the report criteria have been selected, the “Export to Excel” button in the upper right-hand corner starts the download process. **Note:** *For the Standard Reports, some categories have the option to download as a PDF.*

Your web browser will automatically begin the download process. The default file name given to the Create a Report is “CEDR_Report.xlsx”. Standard reports have the default name “Standard Report- *Report Category*”. It is recommended that downloaded files are appropriately renamed.

Chapter 11: Data Category Descriptions

11. DATA CATEGORY DESCRIPTIONS

The Dashboard's **Data Entry Module** contains data entry forms for data categories required for DOE sustainability reporting purposes. Each data category in the **Data Entry Module** contains specific data entry fields that must be completed prior to submission. Current year data entered via the **Data Entry Module** is cumulatively added to the historical data sets. When viewed together, the graphical data in the **QA/QC Module** enables users to see trends and easily identify errors, anomalies, or significant data variances. After submission to the SPO, data will be finalized on the Dashboard.

This chapter presents step-by-step guidance for completing the **Data Entry Module** for each data category. From the **Data Entry Home** page, choose the site from the drop-down menu on the upper right-hand side of the screen, as described in [Section 6.1 Date Entry Module](#). Choose a data category and select the “Enter Data” icon. Each module contains category-specific entry fields. Users should be careful to complete all required fields (all fields except those marked “optional”). It is also recommended that users review data using the **QA/QC Module** prior to submission.

The screenshot shows the 'Data Entry Home' interface for the site 'Headquarters - Forrestal'. The dashboard is organized into several columns, each representing a data category. Each category lists specific data entry items with their respective entry periods and icons for data entry, viewing, and deletion.

| Category | Data Entry Item | Entry Period | Icons |
|---------------------------------------|--|------------------------------|------------------------------|
| Facilities | Energy | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Water | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | On-Site Clean & Renewable Generation Systems | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Purchased Clean & Renewable Energy | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Facility Goal Category | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Sustainable Buildings | Feb 8 to Oct 15 | [Enter Data] [View] [Delete] |
| | Facility Metering Status | | [Enter Data] [View] [Delete] |
| | EISA S432 - Benchmarking | Apr 12 to Feb 9 | [Enter Data] [View] [Delete] |
| | EISA S432 - Evaluations | Apr 12 to Feb 9 | [Enter Data] [View] [Delete] |
| | New/Major Renovation Building Design | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| Site-Level Policy Tracker | Feb 8 to Dec 3 | [Enter Data] [View] [Delete] | |
| Waste | Municipal Solid Waste | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Waste Diversion | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Wastewater Treatment | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Site-Level Policy Tracker | Feb 8 to Dec 3 | [Enter Data] [View] [Delete] |
| Electronic Stewardship & Data Centers | Electronics Acquisition | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Electronics Operations | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Electronics End-of-Life | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Site-Level Policy Tracker | Feb 8 to Dec 3 | [Enter Data] [View] [Delete] |
| Vehicles & Equipment | Non-Fleet Vehicles & Equipment Fuel | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Fugitives & Refrigerants | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Fleet Vehicles Fuel | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Fleet Vehicles Inventory | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| Travel & Commute | Air Travel | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Ground Travel | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Commute | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Site-Level Policy Tracker | Feb 8 to Dec 3 | [Enter Data] [View] [Delete] |
| Measures, Funding & Training | Efficiency & Conservation Measures | | [Enter Data] [View] [Delete] |
| | Appropriations/Direct Obligations | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Training & Education | Feb 8 to Nov 19 | [Enter Data] [View] [Delete] |
| | Site-Level Policy Tracker | Feb 8 to Dec 3 | [Enter Data] [View] [Delete] |
| Acquisition & Procurement | Sustainable Contract Review | | [Enter Data] [View] [Delete] |
| | Site-Level Policy Tracker | Feb 8 to Dec 3 | [Enter Data] [View] [Delete] |
| Resilience | Resilience Questionnaire | | [Enter Data] [View] [Delete] |
| | Site-Level Policy Tracker | Feb 8 to Dec 3 | [Enter Data] [View] [Delete] |

11.1 STANDARDIZED DATA FIELDS

This section reviews the fields in the data entry module that will be prepopulated for all data categories and cannot be edited by the user.

- **Site:** Site name will automatically populate based on site selection in the upper right-hand drop-down menu.
- **PSO:** Program Secretarial Office (PSO) will automatically populate.
- **Site #:** Site Number (i.e., legacy EMS4 number) will automatically populate.
- **Fiscal Year:** The current fiscal year will automatically populate.
- **Save <Data Category> Button:** This button enables the user to save data without submitting the entry for review. When this button is used, the data will be displayed in the right-hand panel of the Data Entry Module.
- **Complete <Data Category> Button:** Prior to submission, please make sure to verify the accuracy of the data through the QA/QC Module (see [Section 5.2 QA/QC Module](#) for more information). Once you have confirmed the data, click on “Complete <Data Category>” to submit for review. A pop-up window will appear asking if you are sure you want to submit the data.

11.2 FACILITIES

Facilities related sustainability data includes categories for Energy, Water, On-Site Clean & Renewable Energy Generation Systems, Purchased Clean and Renewable Energy, Facility Goal Category Sustainable Buildings, Facility Metering Status, Benchmarking, Evaluations, and New/Major Renovation Building Design.

11.2.1 Energy

The Energy data category is primarily focused on a site’s energy utility consumption and associated costs. Users should be prepared with information relating to the types of fuels or materials consumed in the production of electricity or thermal energy for the site and the associated billing information. *The Energy category does not collect on-site renewable energy production or biomass use* (see [Section 11.2.3 Clean & Renewable Energy](#)). Guidance on how to complete the Energy fields is provided below.

Note 1: *All new agency lease solicitations for fully-serviced building leases over 10,000 rentable square feet (RSF) shall include requirements for lessors to disclose energy consumption and carbon emissions data.*

Note 2: *Ensure all source energy is captured. If energy management systems are capturing the site energy use, ensure total source energy is captured and fully reported.*

Energy Fields:

- **Main Site Zip Code:** Main Site Zip Code will automatically populate but can be edited. This is only to allow for sites which have historically included geographically disperse sites under a single site number and zip code. Please contact the Dashboard Team if you choose to change the zip code.
- **Category:** This field has a drop-down list containing three options. Select the appropriate building “Category” for the data being entered: Target Goal Subject Buildings, Target Excluded Buildings, or Fully Serviced Lease(s).

- **Subcategory:** Select the fuel source used to generate energy from the drop-down menu of the following options:

| | |
|---|---|
| <i>Electricity</i> | <i>Isobutene</i> |
| <i>Natural Gas</i> | <i>Isobutylene</i> |
| <i>Fuel Oil</i> | <i>Kerosene</i> |
| <i>Liquefied Petroleum Gas (LPG)</i> | <i>Lubricants</i> |
| <i>Liquefied Natural Gas (LNG)</i> | <i>Motor Gasoline</i> |
| <i>Diesel</i> | <i>Municipal Solid Waste – Fossil-derived</i> |
| <i>Coal</i> | <i>Naphtha <401 degrees F</i> |
| <i>Chilled Water</i> | <i>Natural Gasoline</i> |
| <i>Steam</i> | <i>Other</i> |
| <i>Hot Water</i> | <i>Other Oil- >401 degrees F</i> |
| <i>Asphalt and Road Oil</i> | <i>Pentanes Plus</i> |
| <i>Blast Furnace Gas – Fossil Derived</i> | <i>Petrochemical Feedstocks</i> |
| <i>Butane</i> | <i>Petroleum Coke</i> |
| <i>Butylene</i> | <i>Propane</i> |
| <i>Coke Oven Gas – Fossil Derived</i> | <i>Propylene</i> |
| <i>Crude Oil</i> | <i>Special Naphtha</i> |
| <i>Ethane</i> | <i>Still Gas</i> |
| <i>Ethylene</i> | <i>Tires – Fossil-derived</i> |
| <i>Heavy Gas Oils</i> | <i>Unfinished oils</i> |
| <i>Hydrogen</i> | |

If the fuel source that your site used is not listed, select Other, and provide a description of the energy source used by the site in the “Additional Information” field.

- **Square Feet:** Annual total “Square Feet” will automatically populate based on the “Category” chosen above. This square footage is based on the facility categories selected in Facility Goal Category page. In the past, square footage information was pulled from the Facilities Information Management System’s (FIMS) snapshot each November.
- **Purchased or On-Site Generated Non-Renewable:** This field is currently not editable.
- **Fuel/Material:** Select the specific type of “Fuel or Material” used to produce energy using the drop-down menu. The options in this menu directly correlate to the “Subcategory” chosen above. For example, if Electricity was chosen as a “Subcategory,” the drop-down would have the following options: Combined Heat and Power (CHP), Conventional Hydro, or Grid.
 - Additionally, if *Electricity* was selected, the Dashboard will automatically update to produce an optional field for “Transmission & Distribution Losses.” Many of the Subcategories will have similar choices. If the “Subcategory” *Coal* was selected above, the drop-down menu would provide the following options: Anthracite, Bituminous, Coke, Lignite, Mixed (various), Subbituminous.
- **Usage Unit:** Select the unit by which the site’s energy usage has been measured using the drop-down menu provided. The vast majority of entries will be done using the *Default Unit* option, which then defaults to a specific unit for each fuel type. For example, natural gas defaults to a *Usage Unit* of 1,000 cubic feet but can also be entered in Million BTUs.
- **Carbon Free Electricity (CFE) fields:** If the subcategory is "Electricity" or "Natural Gas", additional required fields will appear.

- **Utility Regulatory Market/Environment:** select from the following options: Vertically Integrated, Retail Electric Choice, Mix, or Not Available.
 - **Utility Provider(s) Name:** Fill out the name of at least one Distribution Provider, Transmission Supplier, and/or Commodity Supplier.
 - **Agreement Type:** Describe the agreement/contract type. For example, General Services Administration (GSA) Areawide Task Order, Defense Logistics Agency (DLA)/GSA Commodity Contract, Western Area Power Administration (WAPA) agreement, etc..
 - **Contract Period Date:** Enter the start and end dates in MM/DD/YYYY format. For each separate contract provider and period, be sure to create a new entry and report the usage and cost separately. This should improve alignment with invoices, data entry accuracy, and verification.
 - **Balancing Authority** (optional): Select your balancing authority from the dropdown menu.
 - **EIA ORIS Plant** (optional): Select your EIA ORIS plant location from the dropdown menu.
 - **Carbon Pollution Free Electricity Grid mix** (optional): Select from the following options: eGRID-Residual Mix, Supplier Attested, and Site Estimate. If you choose "Supplier Attested" or "Site Estimate" from the dropdown, enter the percent fossil fuel and percent clean energy. If "Supplier Attested," upload documentation. If "Site Estimate," upload methodology.
 - **Greenhouse Gas Emissions Account Preference:** Select from the following options: eGRID Subregion, EIA ORIS Plant, and Site Factors. If you select "EIA ORIS Plant" be sure to select the plant location in prior field. If you select "Site Factors", please provide methodology.
 - **Billing Reference (Optional):** If site energy data has associated billing information, enter the reference information (billing numbers, etc.) in this field. Data entry for this field is optional.
- Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form.

11.2.2 Water

Water-related sustainability data is focused on the site's water consumption and associated cost. Users should be prepared with information relating to the types of water consumed and the associated billing information. Guidance on how to complete the entry form is provided below.

Water Fields:

- **Category:** Use the drop down to select category you wish to enter water data for. Options include "Goal Subject & Excluded Buildings" and "Fully Serviced Leases".
- **Subcategory:** Select the most appropriate option that represents the type of water usage being reported. Many sites will only have *Potable* water usage. The following options are provided:
 - Aquifer Recharge
 - ILA Non-Potable Freshwater
 - On-Site Alternative Water
 - Potable Water

As an example, when *On-site Alternative Water* is selected, the following field is automatically generated. Select the option for the data entry and complete the remainder of the fields for one of the following types of “Alternative Water Sources:

- Captured Condensate
- Captured Sump Pump Water
- Gray Water
- Harvested Rainwater/Stormwater
- Other
- Process Reuse
- Reclaimed Wastewater
- Recycled Water
- Reverses Osmosis
- Water Purification Reject Water

Please note if *Aquifer Recharge* is selected, documentation on the quality of water the aquifer is being recharged with must be uploaded to the Dashboard.

- **Square Feet:** Annual total “Square Feet” will automatically populate based on the facility categories selected in Facility Goal Category page. Square footage information is pulled from the Facilities Information Management System’s (FIMS) snapshot in the fall.
 - Unlike the energy intensity goal, **there are no exclusions for water intensity**, so the square footage shown is the total square footage of goal subject plus excluded. Please note, per Federal guidance, energy square footage equals water square footage unless there is a major difference. In such a case, please contact the SPO.
- **Data Entry Period Type:** Select the period type that site data will be entered. There are two options, each giving the user a different set of entry fields to complete below: Fiscal Year by Quarter and Fiscal Year by Month.
 - *Fiscal Year by Quarter:* Selecting this option will populate fields, broken down by quarter. Water consumption data (as measured in Millions of Gallons, not whole numbers) must be entered using a quarterly breakdown of the site’s “Fiscal Year”, using the months as shown in the table below. The associated cost of the site’s water consumption (in whole numbers) must be entered in the corresponding “Cost” field.
 - *Fiscal Year by Month:* Selecting this option will load months instead of quarters. Water consumption should be entered in millions of gallons within the monthly “Usage Unit” fields. Cost data should be entered in by month in “Cost (\$)” field. For accuracy, ensure that the amount and cost data sets for each month are in their appropriate fields.
- **Usage Unit:** This field is auto-populated because all water consumption is measured in *Millions of Gallons*.
- **Billing Reference (Optional):** If the site water consumption has associated billing information, enter the reference information (billing numbers, etc.) in this field.
- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. For example, if captured rainwater is being used, select the *Reclaimed/Cycled* option in the “Subcategory” drop-down menu and briefly describe the practice in this field.

11.2.3 On-Site Clean & Renewable Generation Systems

The Clean & Renewable Energy data category is focused on the site's data for electric and thermal renewable energy consumption, and renewable energy credit (REC) tracking. Guidance on how to complete the Clean & Renewable Energy entry form is provided below.

Instructions are broken down by the three "Subcategories": *On-Site Systems*, *Green Energy Purchase*, and *RECs*. Green energy purchases and REC entries require similar data, while on-site systems are markedly different. System information data for on-site systems entered into the Dashboard is retained year over year and only needs to be updated if there is a change, such as when the system is removed; while energy output for on-site systems should be reviewed and updated as necessary.

On-Site Clean and Renewable Generation Systems Fields:

Update System Information for New or Existing Systems: "Add New Record" on the left side of the screen and blank data fields will populate horizontally. This will create a new generation system row to be filled in by the user for the first time.

If you would like to update an existing generation system, choose "edit" from just left of the existing generation system information displayed on the screen.

Select "delete" to remove the generation system entry.

The name for each system is based on concatenating the "System Description/Name" and "Location Description" in the system information. These names are based on previous CEDR data, and the user can update the "System Description/Name" and "Location Description" so that it matches the desired name.

- **System Description/ Name:** Provide the system description or name.
- **Location Description:** Briefly describe where the system is located.
- **Renewable Fuel Type:** Using the provided drop-down menu, select the option that most closely matches the type of renewable energy/fuel that the aforementioned system is using. If "" is selected, provide a description in the next field.
- **Year Installed:** Using the drop-down menu, select the year that the renewable energy system's installation was completed.
- **Nameplate Capacity:** Enter the system electric capacity (in kW) that is listed on the nameplate of the renewable energy system. Leave this entry blank if the system produces thermal energy.
- **Electric or Thermal:** Using the drop-down menu, select the option that describes the type of energy being produced by the renewable energy system. There are three options: Electric, Thermal, and Both. Some renewable energy systems provide thermal energy (heat) as well as electric. If this is the case at your site, select *Both*. If the system only produces electricity or thermal, select that single option and complete the fields. The option selected dictates the entry fields in Section 2 'Production and Fuel Information.'
- **Capital Equipment/ Implementation Cost:** Enter the cost (in total dollars) of the renewable energy system's equipment and implementation.
- **Acquisition Method:** Using the drop-down menu, select the option that most accurately describes the means by which the renewable energy system was acquired by the site. If

there are no options that sufficiently describe the site's acquisition method, select the *Other Funding Source* option and describe the method in the "Additional Information (Optional)" field at the bottom of the page. The options for this field are ARRA, General Plant Project (GPP), Line Item, Utility Energy Service Contract (UESC), Energy Savings Performance Contract (ESPC), Power Purchase Agreement (PPA), Enhanced Use Lease (EUL), Incentive Program, Direct Centralized Capital Funding, Decentralized Operating Budgets, and Other Funding Source.

- For part one: is the site on Federal land, Indian land, or neither?
- For Part two: is the system on the user's site, is power transmitted to the user's site, is the system hosted on the site (and transmitting power to another), or is the system adjacent to the site?
- **% of RECs Retained:** Using the provided drop-down menu, select the approximate percentage of Renewable Energy Credits retained by the site for this renewable energy system. The drop-down list provides options in 10% increments.
- **Purchased Replacement RECs for Consumed Energy?:** If you retained less than 100% of the RECs generated by the on-site system but purchased replacement Renewable Energy Credits for the site's energy consumption, use the drop-down menu to select Yes. If not, select *No*.

Operational Status: Using the drop-down menu, select the status that most accurately describes the renewable energy system. The system will either be operational or decommissioned/removed from service.

- **System Location Zip Code:** Enter the zip code for the area in which the renewable energy system is deployed.
- **Siting Status:** Using the drop-down menu, select the siting option that most accurately represents the renewable energy system's situation. For each option, there are two parts: the type of land the system is sited on followed by the relationship of the site to the system.
 - For part one: is the site on Federal land, Indian land, or neither?
 - For Part two: is the system on the user's site, is power transmitted to the user's site, is the system hosted on the site (and transmitting power to another), or is the system adjacent to the site?
- **Grid Status:** Using the drop-down menu, select the option that most accurately describes the renewable energy system's connection to the electrical grid. Options beginning with *Both* refer to the system having both electric and thermal output. The options are: Electric on Grid, Electric Off Grid, Non-Electric, Both On Grid, Both Off Grid.
- **Do You Own the T&D System?:** Using the drop-down menu, select *Yes* if the site owns the transmission & distribution system for site electricity as it relates to the renewable energy system. If the site does not own the T&D, select *No*. If no electricity is delivered (for example, if the system is thermal) select *No Electricity is Delivered (Non-Electric)*.

GHG Scope: For greenhouse gas goals, select which scope the site is using to report renewable energy system data. The options are Scope 1 (GHG emissions from sources owned/controlled by a federal agency), Scope 2 (GHG emissions resulting from the generation of electricity, heat, or steam purchased by a Federal Agency), or Scope 3 (GHG emissions from sources not owned/directly controlled by a Federal agency, but are related to agency activities (e.g., hosted systems))

- **Energy Intensity End Use Category:**
Select the option that most accurately describes how the site wishes to categorize the energy intensity goals for the data related to the renewable energy system. You can select either *Goal Subject* or *Excluded*.

- **Renewable Electricity Output (MWh/Yr):** Enter the total electricity output of the renewable energy system in Megawatt hours per year. This field will not be available if the system is only thermal (as selected in the “Electric or Thermal” field under 1 System Information).
- **Renewable Thermal Output (MMBtu/Yr):** Enter the total thermal output of the renewable energy system in MMBtu per year. This field will not be available if the system is only electric (as selected in the “Electric or Thermal” field under 1 System Information).
- **Principal Biomass Fuel Type:** If the system utilizes biomass, select the biomass variety that the site uses as its primary fuel.
- **Principal Biomass Fuel Use (MMBTU/Yr):** Enter the total principal biomass fuel use (in Millions of BTUs).
- **Secondary/Blend Fuel Type:** If a secondary biomass fuel was used to produce energy, use the drop-down menu to select the fuel that was used.
- **Secondary/Blend Fuel Use (MMBTU/Yr):** Enter the total secondary biomass fuel use (in Millions of BTUs).
- **If Applicable, Annual Fuel Cost (\$):** Enter the costs for purchasing fuel, if applicable.
- **If Available, Annual Operations Cost (\$):** If the numbers are available, use this field to enter the total annual operations cost of the renewable energy system.
- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be input into the data entry form. Data entry for this field is optional.

11.2.4 Purchased Clean & Renewable Energy

Purchased Clean & Renewable Energy Fields

- **Subcategory:** If the site purchased renewable energy that was consumed during agency activities, use the Purchased Clean and Renewable Energy category option. Select either “Green Energy Purchase” or “Renewable Energy Credit Only Purchase” from the subcategory dropdown. Once a subcategory has been selected, the Dashboard will automatically refresh the page, presenting the user with the relevant fields.
- **Data Entry Period Type:** Select the type of period breakdown that the site will be using to enter renewable energy data. The options are Fiscal Year by Quarter, Fiscal Year by Month, and Annual.
 - *Fiscal Year by Quarter:* When this option is selected, the Dashboard automatically adds fields for each quarter’s *Electricity Purchased (in MWh)* or *RECs Purchased (in MWh)* and the associated *Purchased Cost (\$)*. Enter the quarterly data in these fields.
 - *Fiscal Year by Month:* When this option is selected, the Dashboard automatically adds fields for each month’s totals in *Electricity Purchased (in MWh)* or *RECs Purchased (in MWh)* and the associated *Purchased Cost (\$)* of that renewable energy. Enter monthly data in the appropriate fields.
 - *Annual:* When this option is selected, the Dashboard automatically adds two fields for data entry. These fields are *Electricity Purchased (MWh)* or *RECs Purchased (in MWh)* and the associated *Purchased Cost (\$)*. Enter the annual data in these fields.
- **Renewable Fuel Type:** Using the provided drop-down menu, select the option that most closely matches the type of renewable energy fuel that the aforementioned system is using.

- **Install/Service Year:** Enter the year in which the renewable energy system that the site is purchasing green energy from was installed or placed in service. If entering RECs, enter the year in which the renewable energy system that the site is purchasing RECs from was installed or placed in service. Note, RECs must have an installation date within 10 years on the current FY.
- **Electric or Thermal? (If Applicable):** If Green Energy Purchase is selected as the purchased type from the Subcategory dropdown, users must select if the energy is electric or thermal. If the green energy purchased is in the form of electricity, select *Electric* from the drop-down menu and continue. If the site is entering data for green energy purchases in the form of thermal energy, select *Thermal* and continue.
- **Source Zip Code:** Enter the zip code in which the renewable energy system that the site is purchasing green energy from is located.
- **Siting Status:** Using the drop-down menu, select the siting option that represents the renewable energy system's location. For each option, there are two parts: the type of land the system is sited on followed by the relationship of the site to the system.
 - For part one: Is the site on Federal land, Indian land, or neither?
 - For part two: Is the system on the user's site, is power transmitted to the user's site, is the system hosted on the site (and transmitting power to another), or is the system adjacent to the site?
- **Energy Intensity/End Use Category:** Select the option that most accurately describes how the site wishes to categorize the energy intensity goals for the data related to the renewable energy system or RECs. The choices are either *Goal Subject* or *Excluded*.
- **Supplier/ Contract With:** Using the drop-down menu, select the organization with which the site has an agreement for a green energy or REC purchase. Choose from the following options: Bonneville Power Administration (BPA), Defense Logistics Agency's Defense Energy Support Center (DLA/DESC), General Services Administration (GSA), Tennessee Valley Authority (TVA), and Western Area Power Administration (WAPA). If the green energy purchases come from another source, select *Other* and describe the situation in the "Additional Information" field at the bottom of the page.
- **Multi-Year Contract?:** If green energy or REC purchases are being made under a multi-year contract, select *Yes*. If not, select *No*. If you select *Yes*, you must then enter the contract start and end dates in the appropriate fields.

Green Energy Purchases:

- If Green Energy Purchases is selected as the *Subcategory*, the Dashboard will switch the data entry fields to match if electric or thermal was previously selected.
 - Electricity: There are two fields that appear below the *Electric* or *Thermal* category, the first being "Electricity Purchased (MWh)" and the second being "Purchased Cost (\$)". Complete these fields by entering the total green energy electricity purchased (in MWh) in the first field, then the purchased cost in dollars.
 - If *Thermal* was selected, enter the thermal purchased (in MMBtu) and the purchased cost in dollars.

Renewable Energy Credit Only Purchase: If Renewable Energy Credit Only Purchases are selected as the *Subcategory*, users should fill in the following fields:

- **Electricity Purchased (MWh) & Cost (\$):** Complete these fields by entering the total RECs purchased and their associated cost over the current fiscal year.

- **Billing Reference (Optional):** If the site renewables data has associated billing data, enter the reference information (billing numbers, etc.) in this field. Data entry into this field is optional.
- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be input into the data entry form. Data entry for this field is optional.

11.2.5 Facility Goal Category

The Facility Goal Category collects facility status relative to the energy intensity goal and EISA Section 432, including excluded and goal-subject square footage, exclusion part, justification statement, high energy mission specific facilities (HEMSF), covered under EISA Section 432, energy and water audit dates, and existing facility net-zero status. Basic facility information is uploaded from the FIMS database two to four times a year to capture changes in inventory. This information is not editable. For a description of these fields, refer to the [FIMS data dictionary](#).

Snapshots of the facility status are periodically taken for goal performance evaluation, similar to the FIMS snapshot square footage roll-ups. Data can be updated as need be, however, please note categories should be relatively consistent throughout the term of the goal. **Starting with FY 2016, the Dashboard goal category status will be considered the official system of record.** Facility status can be updated and viewed through the use of several filters that appear above the data table.

A description of filters for viewing and editing the data are as follows:

The screenshot shows the 'Facility Goal Category' dashboard. It features a header with the title and a search bar. Below the header, there are several filter sections. Section 1 highlights the site information fields: 'PSO: SC', 'Site: Argonne National Laboratory', and 'Site #: 351'. Section 2 highlights the 'Fiscal Year: 2021' dropdown menu. Section 3 highlights the 'Count OSF' and 'Count Outgrant' checkboxes. Section 4 highlights the 'Property Type: All' dropdown menu. Section 5 highlights the 'Ownership: All' dropdown menu. Section 6 highlights the 'Outgrant Indicator: All' dropdown menu. Section 7 highlights the search fields: 'Search Property Name:' and 'Search Property ID:'. There is also a 'Download FIMS Building Report' button and a 'Select Column(s) to View' section at the bottom.

1. Site Information: “PSO”, “Site Name”, and “Site Number” are prepopulated.
2. Fiscal Year can be manually selected using the drop-down menu.
3. Count OSF or Count Outgrant: These check boxes are prepopulated based on historic accounting. If you wish to change the checked box, please contact the Dashboard Team.
4. Property Type: You can filter the data by selecting the type of property from the drop-down menu: All, Buildings, Trailers, and OSF.
5. Ownership: Use this drop-down menu to filter the data based on the ownership.
6. Outgrant Indicator: This drop-down has the option to select *All*, *Yes*, or *No*. It indicates the right to use DOE property by means of a lease, easement, license, permit, or interagency agreement. DOE, the “grantor”, grants to federal, state, and nongovernmental entities (known as “grantees”) the right to enter upon government owned or leased land, property and/or facilities for the purpose of conducting grantee business. An asset will have an outgrant status even if only a portion of the property is involved in the outgrant. The Outgrant Indicator will be updated with quarterly or annual data from FIMS.
7. Exclusion Part: This drop-down lists the available exclusions for a building.

8. Candidate for Electrification: Options are Yes or No and auto-populated based on site entry. To be a candidate for electrification, the building must be DOE Owned (O) AND an EISA 432 Covered Facility AND consume at least one Scope 1 Emission Fossil Fuel Source from Standard Buildings Operations OR consume energy from a DOE Owned District System.
9. Search Property Name or Search Property ID: This text box allows you to search for a specific property by typing in keywords in the property name or property ID fields.

After you select your filters, the data will appear in a table below. Use the scroll bars to navigate to the desired information. If you wish to edit information for a specific property, use the “Edit” or “Select” buttons in the left-hand column of the table. The “Edit” button allows you to update fields from the table while the “Select” button takes you to the Facility Overview page as described in [Section 11.2.9](#).

Facility Goal Category Data Fields:

Guidance on how to complete the fields is provided below. The fields should be reviewed annually and updated as need be.

- **Goal Subject SqFt:** For buildings, trailers, or other structures and facilities (OSF), enter the square feet for which DOE funds energy usage being consumed and is subject to the building energy intensity reduction goal. Note, Goal Subject, Excluded, and Non-Energy Consuming square footage must equal the Gross square footage for each facility.
- **Excluded SqFt:** For buildings, trailers, or other structures and facilities (OSF), enter the square feet for which DOE funds energy usage but is excluded from the building energy intensity reduction goals. Note, Goal Subject, Excluded, and Non-Energy Consuming square footage must equal the Gross square footage for each facility.
- **Non-Energy Consuming SqFt:** For buildings, trailers, or other structures and facilities (OSF), enter the square feet that does not consume energy. For facilities that have areas that consume energy and some that do not, this number would be the remaining square footage after energy consuming Goal Subject and Excluded Facilities have been subtracted from the total gross square footage. Note: Goal Subject, Excluded, and Non-Energy Consuming square footage must equal the Gross square footage for each facility.
- **Non-Water Consuming SqFt:** For buildings, trailers, or other structures and facilities (OSF), enter the square feet that does not consume water.
- **An HEMSF Facility?:** Using the drop-down menu, select “Yes” or “No” to identify if the facility is a high energy mission specific facilities (HEMSF), per Program definition.

In general, a HEMSF plays an essential and unique role in fundamental research and development of innovative, breakthrough technologies required for DOE to deliver on its core missions in energy, scientific discovery, and national security. HEMSF are separately constructed, mission-specific facilities, such as accelerators (particle and light sources), reactors (fusion and fission), high performance computers, high performance lasers and similar facilities and the closely coupled conventional facilities necessary for their operations. HEMSFs represent unique and often world-leading, core-mission relevant capabilities relative to other research apparatuses funded by DOE, other government agencies, and/or industry. Many HEMSFs are facilities effectively managed by DOE and used by scientists and engineers across the globe to conduct research and development. Such facilities account for a significant percentage of DOE’s electrical energy consumption.

- **Exclusion Part:** If square footage is excluded, using the drop-down menu, select the most appropriate exclusion code. For details on the Exclusion Parts see the *Guidance for DOE Site Sustainability Plans*.
- **Exclusion Justification Comment:** Provide a description as to why a building is being excluded. Each excluded building requires a justification.

Resilience

- **Mission Dependency:** This field is imported from FIMS.
- **Mission Impact:** This field is imported from FIMS.
- **Critical Assets & Infrastructure Type:** Dropdown
- **Other Type:**

Net-Zero Plans (Within the Facility Goal Category section)

Electrification

- **Candidate for Electrification:** This is a calculated field based on 1) the facility being a DOE-owned building; 2) being more than 25,000 GSF.
- **Priority for Electrification:** Select High, Medium, or Low.
- **Planned Year for Electrification:** Enter in YYYY.

Net-Zero Plans

- **Emission:** Using the check boxes, select “Emission” to identify if the facility is a candidate to be net-zero energy.
- **Water:** Using the check boxes, select “Water” to identify if the facility is a candidate to be net-zero water.
- **Waste:** Using the check boxes, select “Waste” to identify if the facility is a candidate to be net-zero waste.

11.2.6 Sustainable Buildings

The Sustainable Buildings category allows you to view and update your sustainable buildings information. The Dashboard is the collection source for all non-FRPP sustainable building fields due to changes to the FIMS database. Annually, the Sustainable Buildings page will be crosschecked with FIMS to ensure consistency.

The following is a description of filters for viewing the data:

1. **Site Information:** “PSO”, “Site Name”, and “Site Number” are auto-populated.
2. **Fiscal Year:** Use this drop-down menu to manually select a specific fiscal year.
3. **Sustainable Building Subject:** Use this drop-down menu to filter data based on whether the building is applicable/subject to sustainable building criteria (filter for ‘yes’ or ‘no’).

4. **Approach:** Use this drop-down menu to filter for new construction, existing buildings, or not applicable facilities.
5. **Guiding Principle %:** Use this drop-down menu to filter the data based on percent of Guiding Principles (GPs) completed. **Note:** *Only buildings that are 100% compliant count towards the Sustainable Buildings goal. The drop-down list provides options in 25% increments.*
6. **FRPP Status:** Use this drop-down menu to filter the data based on Federal Real Property Profile (FRPP) Sustainability codes. Details on FRPP sustainability codes can be found in the annual [Federal Real Property Council Guidance](#). Please reference the most recent FRPP guidance for updated information or changes to requirements. **Note:** *This field is generated in the Dashboard based on previous data entries whereas in FIMS the user selects the appropriate option.*
7. **Search Property Name or ID:** These text boxes allow you to search for a specific property by name or ID.
8. **Last FIMS Upload:** Shows the date of the last time the SPO team uploaded sustainable buildings data from FIMS. **Note:** *This is uploaded annually.*

The “Edit” button allows you to edit the sustainable building fields from the table while the “Select” button takes you to the Facility Overview page, as described in [Section 11.2.9](#) which has all the goal category, metering, EISA Sec 432, and sustainable building information relative to the selected facility in one page. **Note:** *The “Edit” button will only be visible when this page is unlocked and open for data entry.*

Sustainable Building Data Fields (Status & Details):

- **Sustainable Building Subject:** This field is auto generated based on the facility’s GSF, property type, Ownership, and excess status. “Y” means the facility is subject to the goal, “N” means it is not.
- **Approach:** This field is required if Sustainable Building Subject = Y
Use the drop down to select the approach for Guiding Principles:
 - EB = Existing Building
 - NC = New Construction
 - NA = Not Applicable
- **Occupied Hrs./Person/Day (Actual or Estimated):** Enter in the actual or estimated occupied hrs./person/day for the facility. Required if Approach = NA and the following FIMS fields are not met:
 - Excess Indicator = Yes AND Excess Date = MM/DD/YY
OR
 - GSA Notification of Excess Submitted = MM/DD/YY
OR
 - GSA Notification of Excess Accepted = MM/DD/YY.

Note: *If FIMS fields are met, this is optional.*

Energy Use BTU/SqFt/yr (Actual or Estimated): Enter in the actual or estimated energy use in BTU/SqFt/yr for the facility. Required if Approach = NA and the following FIMS fields are not met:

- Excess Indicator = Yes AND Excess Date = MM/DD/YY
OR
- GSA Notification of Excess Submitted = MM/DD/YY

- OR
- GSA Notification of Excess Accepted = MM/DD/YY.

Note: *If FIMS fields are met, this is optional.*

Water Use Gal/day (Actual or Estimated): Enter in the actual or estimated water use in gal/day for the facility. Required if Approach = NA and the following FIMS fields are not met:

- Excess Indicator = Yes AND Excess Date = MM/DD/YY
- OR
- GSA Notification of Excess Submitted = MM/DD/YY
- OR
- GSA Notification of Excess Accepted = MM/DD/YY.

Note: *If FIMS fields are met, this is optional.*

- **Assessment Year (Actual or Anticipated):** Enter the year the facility was assessed or is anticipated to be assessed. Please use the format 'YYYY'.
- **Assessment Year is Actual:** Check this box when the assessment has been completed and finalized. Ensure the Assessment Year is accurate prior to checking this box.
- **Initial Compliance Year (Actual or Anticipated):** Enter the year the facility met the GPs or is anticipated to meet the GPs. Please use the format 'YYYY'.
- **Compliance Year is Actual:** Check this box when compliance has been achieved and finalized. Ensure the Compliance Year is accurate prior to checking this box.
- **Recertification Year (Actual or Anticipated):** Enter the year the facility was recertified to meet the GPs or when the recertification is anticipated to be complete. Please use the format 'YYYY'.
- **Recertification is Actual:** Check this box when the recertification has been completed and finalized. Ensure the Recertification Year is accurate prior to checking this box.
- **Guiding Principle %:** Use this field to track GP compliance progress for each facility. Enter a number between 0 and 100. Zero meaning the facility has not been assessed, and 100 meaning it is 100% compliant with the GPs.
- **Guiding Principles Version:** Use the drop down menu to select the corresponding GP version the facility is in compliance with. Options are: 2006 GPs, 2008 GPs, 2016 GPs, or 2020 GPs.

Note: *Assets are to comply with the 2020 GPs starting on December 23, 2020, unless significant action has already been taken to meet the 2016 GPs and a change of reference could incur significant costs or result in project delays. Buildings and projects assessed under a prior version of the Guidance may be considered grandfathered and should be reassessed four years from the fiscal year it was last assessed as meeting the 2016 Guiding Principles or, if grandfathered prior to 2016, no later than four fiscal years from the issuance of the 2020 GPs.*

- **Project GSF:** Enter the gross square footage (GSF) of the facility that is subject to the goal.
- **Third Party Certification Level Received (Optional):** If the facility received a third-party certification, use the drop down menu to select the certification achieved.

Note: Accepted third-party certification systems are those most recently recommended by the U.S. General Services Administration (GSA) in accordance with its authority under 42 U.S. Code § 17092.

- **Third Party Certification Project ID:** Optional. If the facility received a third-party certification, enter the project ID number.
- **Compliance Tracking Method:** Use the drop-down menu to select your tracking method. Options include Portfolio Manager or Other.
- **Describe Other:** If "Other" is selected in the Compliance Tracking Method, please describe.
- **Estimated Cost of Compliance (\$):** Optional numerical field to enter estimated cost of meeting the GPs for a given facility.
- **Explanation for Non-Compliance:** Optional text field to enter an explanation for a facility's inability to meet the GPs.
- **FRPP Status:** Calculated based on entry in other fields (goal subject or not subject to goal).
- **Upload Documents:** Upload any supporting documents you may wish to include. This field is optional.
- **Additional Information:** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. Data entry for this field is optional.

11.2.7 Facility Metering Status

This section is the hub for all metering data. This Dashboard category is for both meters that are currently installed (Metering Status) and meters that will be installed in the future (Metering Prioritization).

The Metering Status category will allow you to enter and update utility metering status and prioritization for each metered facility based on basic facility information from the FIMS database. A snapshot of the metering data will be taken annually; otherwise, data can be updated as needed.

- **Appropriate for Metering**
 - Calculated field based on the following:
 - Start with assumption that "Meter Required?" is "Yes"
 - Changes to "No" if any of the following are applicable:
 - Status is not Operating, Standby or Outgranted.
 - Size is less than 1000 sqft.
 - Disposition year is less than or equal to reporting year +5
 - Ownership is not DOE Owned and total costs (electricity, gas, water, central heating, central cooling) are 0.
 - Size is between 1000 and 2500 and one of the following is true:
 - Property is not Building or Trailer and Usage code is not 210, 291, 297, 5xx, or 7xx
 - Property is not OSF and Usage code is not 5xxx or 4xxx
 - If the analysis reaches any single "No", then it stays "No."

- If analysis makes it through the above without meeting any of the "No" criteria, then "Appropriate for Metering Required?" remains "Yes."
- **Metering Status:** Select: fully metered, partially metered, not metered, or metering not needed from the drop down menu.
- **If not Fully Metered, Planned Year:** Enter the planned year to be fully metered as YYYY.
- **Electricity Metering Status**
- **Natural Gas Metering Status**
- **Steam Metering Status**
- **Water (Potable) Metering Status:**
- **Covered by Federal Building Performance Standard**
 - Calculated field based on the asset being a DOE owned building greater than 25,000 GSF.
- **Scope 1 Emission Fossil Fuel Source from Standard Buildings Operations:** Per the Federal Building Performance Standard, standard building operations includes space heating and cooling, water heating, cooking, backup generators used for non-emergency services, and laundry. If fossil fuel supports both standard operations and process loads, report and select source(s). Check all that apply: Natural Gas, Fuel Oil, Liquefied Petroleum Gas, Liquefied Natural Gas, Diesel, Coal, Tires-Fossil derived, Other.
- **Is Energy from a DOE owned District System?** Check the box if an asset receives electricity, hot or chilled water, or steam from a DOE owned district system or combined heat and power system AND the system uses fossil fuels to operate.
- **Asset is or Contains a DOE Owned District System?** Check the box if the asset is or contains a DOE-Owned District System.

11.2.8 EISA Section 432 Benchmarking

Agencies are required to benchmark all metered buildings that are covered facilities for building energy performance. This data must be updated annually in the EISA 432 Compliance Tracking System (CTS) developed by DOE.

There are two options for sites to provide Portfolio Manager (PM) benchmarking data:

1. Sites can share their data with the SPO Master Portfolio account: **USDOESPO**. The SPO will upload the data to the Dashboard and CTS.
2. Sites can release PM data directly to the Dashboard and CTS.

The screenshot shows the 'EISA S432 Benchmarking' interface. It includes a search bar with fields for 'PSO (Lead): EE', 'Site: National Renewable Energy Laboratory', and 'Site #: 5001'. There are dropdown menus for 'Fiscal Year: 2017' and 'Month: All'. A search filter section contains 'Search Property Name:' and 'Search Property ID:' fields, along with an 'Update Search Filter' button. Below this is a 'Select Column(s) to View' section with several checked checkboxes: 'FIMS Property Information', 'PM - Meter and Usage Details', 'PM - Electric Meters with Green Power', 'PM - On-Site Renewable Meters', and 'PM - Disposed Waste Meters'. A note at the bottom states: 'Note: Benchmarking data is editable in Portfolio Manager (PM) only. Site users with write access can upload PM data using the Dashboard specific template. To request this template, contact the Dashboard Team. Alternatively, PM data can be shared in PM with the Dashboard Team under username USDOESPO. If shared, the Dashboard Team will upload and report out on behalf of the site to the Dashboard and CTS.'

A description of the filters for viewing is below:

1. PSO, Site Name, and Site Number will be prepopulated.
2. Fiscal Year: Use the drop-down menu to select the desired year.
3. Month: Use the drop-down to select the desired month.
4. Search: Use these search functions to filter for a specific facility by Property Name or Property ID.

- This function allows the user to hide or show columns in the table to make for easier viewing.

Note: Site users with write access can upload PM data using a Dashboard specific template. To request this template, contact the Dashboard Team. See below for more details on requesting and uploading the template.

Obtaining the Dashboard Template:

- Send the Dashboard Team an email to request the download.
- If site's data is already shared with the SPO Master PM Account, SPO can share the Template with the site directly through Portfolio Manager. If not, SPO will email the site a link to the download template.
- After receipt of the Template via email or PM, follow the directions below to properly generate a report and upload to the Dashboard.

The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top, there is a navigation bar with tabs for MyPortfolio, Sharing, Reporting (selected), and Recognition. The main content area is divided into two columns. The left column, titled 'Charts & Graphs', features a large graphic with the text 'Weather Normalized Source EUI' and a question: 'How much total primary fuel would be required by my properties, under average weather conditions?'. The right column, titled 'ENERGY STAR Performance Documents', contains a list of document links: Statement of Energy Performance (SEP), Statement of Energy Design Intent (SEDI), Data Verification Checklist, Progress & Goals Report, and ENERGY STAR Score Card. Below these sections is a 'Templates & Reports (16)' section containing a table with columns for Name, Status, and a dropdown menu for actions. A context menu is open over the first row of the table, showing options like 'View Current Report', 'Download Current Report in Excel', 'Generate New Report', etc.

| Name | Status | |
|--|---|--------------|
| DOE Dashboard Upload Template | Generated: 5/31/2017 3:08 PM | I want to... |
| Data Request: EISA 432 CTS (FY 2016) v2 (Request from FEMP EISA 432 CTS) | Response Preview Generated: 5/31/2017 2:52 PM | I want to... |
| Energy Performance | Generated: 5/30/2017 3:33 PM | I want to... |
| Data Request: EISA 432 CTS (FY 2014) v2 (Request from FEMP | Response Preview Generated: | I want to... |

Generating a Report & Uploading to Dashboard:

- If the Template is shared via PM, log into PM account. User should see in the list of documents the “DOE Dashboard Template”.
- Use the drop-down menu to the right of the file and select “Generate New Report”. This will redirect to another screen in which report parameters must be selected.
- Select the parameters using the drop-down menus. The user can choose to only upload the current FY or upload historical data as well.
- Select “Download Current Report in Excel” to generate Excel document. Use the Bulk Data Upload icon to access the Upload page. Choose file and upload to complete process.

11.2.8.1 EISA S432 Benchmarking: How to Benchmark a Campus

Portfolio Manager offers the option to benchmark a single building as well as an entire site or campus. Benchmarking a campus allows you to measure the performance of not only a single building, but also track how all your properties contribute to campus-wide performance.

Below are a few easy steps to guide you through benchmarking a campus:

- **Create A Parent Property:**
 - In Portfolio Manager, click Add a Property on the “MyPortfolio” tab. This property should represent the total number of buildings on your campus.
 - Enter the general information for the parent property into the “Set Up Property” Page.
 - In Your Property’s Buildings section, select the “More than One” option and enter in the number of buildings.
 - Enter your parent property’s information into the Basic Information page.
 - On the “How is it used?” page, enter required details.
- **Add a Child to the Parent Property:**
 - Add an existing building: If the building you wish to add is already in Portfolio Manager, search for the building in the “Add a Building already in Portfolio Manager to the Property” section.
 - Enter a New Building: Use the “Enter a New Building” section to add a new building and follow the steps to entering all required information.
- **Add Meters:**
 - Go to the “Energy, Water” or “Waste & Materials” tab and click “Add a Meter”.
 - **For Energy or Water:** Select type used and number of meters and click “Get Started”. Click on a meter to enter units and first bill date; if the meter reflects a bulk fuel purchase, select Enter as Delivery? Checkbox. Use the blue arrow next to each meter to expand section on “Your Meter Entries” Page. Click “Add Another Entry” and enter data. Use the Estimation checkbox if you are not including measured data. Finally, select the boxes of meters that total your property’s energy and water use on “Select Meters to Include in Metrics” page and click “Apply Selections”.
 - **For Waste & Materials:** Select the type of waste, indicate what you do with it and click “Continue”. Enter in the collection frequency, units used, and date you started tracking. Click “Create Meter(s)”. Use the blue arrow next to each meter to expand section on “Your Meter Entries” Page. Click “Add Another Entry” and enter data, use the Estimation checkbox if you are not including measured data. You may also include cost and disposal destination here. When finished, click “Continue”.

- **Confirm Meter Configurations and Associations**
 - You must indicate the meter configuration for both the parent property and all child properties. For campuses, you must indicate if and how a child-property level meter is associated with the campus to ensure accurate metrics.
 - Use the “Select Meters to Include in Metrics” page to specify how each meter should be counted. For the parent property, you can associate child meters upward to capture consumption data at the property level.
 - **Note:** *if meter consumption of a child property meter is also captured by a master meter on the campus level, the child property data should not be included in the campus meter consumption totals.*

11.2.9 EISA Section 432 Evaluations

EISA S432, requires agencies to perform comprehensive energy and water evaluations for approximately 25% of covered facilities each year so that all covered facilities are evaluated on a 4-year cycle. The EISA S432 Evaluations module collects covered facility characteristics and associated evaluation status. For key reporting dates, view the *Schedules* page of the Dashboard. A description of the filters for viewing and editing data is as follows:

The screenshot shows the EISA S432 Evaluations filter interface. It includes the following fields and options:

- 1. PSO (Lead): NNSA
- Site: Albuquerque Complex
- Site #: 102
- 2. Fiscal Year: 2018
- 3. Property Type: All
- EISA S432 Covered: Covered
- 4. Current Cycle Evaluation Status: All
- 6. Retro/Re-Commissioning Assessment Status: All
- Retro/Re-Commissioning 0.0 % Retro/Re Assessment CTS Input: Cx, CTS = No
- 7. Facility-Level Utility Use Status (Water): All
- Facility-Level Utility Use Status (Energy): All
- 8. Search Property Name: [Text Box]
- Property ID: [Text Box]
- Update Search Filter: [Button]
- 9. Current Energy Manager: Other
- Other Name: Trujillo, Eric
- Other Email: [Text Box]
- Separate Energy and Water Evaluation: [Checkbox]
- Exempt from Public Disclosure: No
- Save Changes: [Button]

1. PSO, Site Name, and Site Number will be prepopulated.
2. Fiscal Year: Use the drop-down menu to select the desired year.
3. Property Type: You can filter the data by selecting the type of property from the drop-down menu: All, Buildings, Trailers, or OSF.
4. EISA S432 Covered: This allows you to view all facilities or filter your facilities based on whether they are Covered or Not Covered. The default is Covered.
5. Current Cycle Evaluation Status: Use this drop-down to filter for Complete or Remaining evaluations.
6. Retro/Re-commissioning Assessment Status: This filter allows you to view facilities based on commissioning status. Next to the filter, the percent of covered facilities that have “Yes” for commissioning is shown along with the overall site level status that will be reflected in CTS.
7. Facility-Level Utility Use Status (Water): These filters allow for filtering by data entry type, such as if the usage info is being pulled from Portfolio Manager benchmarking data, the site manually entered the data, or no information has been provided.
8. Facility-Level Utility Use Status (Energy): These filters allow for filtering by data entry type, such as if the usage info is being pulled from Portfolio Manager benchmarking data, the site manually entered the data, or no information has been provided.
9. Search Property Name: This text box allows you to search for a specific property by typing in any keywords in the property’s name.
10. Users can use the drop down menu to select the current Energy Manager. If Other, please provide the Manager’s name and email. Sites may also choose to separately report energy and water evaluation status instead of combined (default setting) and

declare if the site is exempt from public disclosure. Note, there are very few cases which the information for EISA S432 is exempt from public disclosure.

11.2.9.1 Covered Facility Characteristics & Evaluation Status

Annually, sites will need to review and update their covered facility characteristics. Covered facility energy should constitute at least 75% of the site's total energy use. Note, this does not include renewable energy.

Facility level energy and water use data are required for covered facilities, while usage information is optional for facilities that are not covered. Data is automatically pulled from the benchmarking module for facilities that have their Portfolio Manager benchmarking data in the Dashboard. In such cases, usage information can only be updated via Portfolio Manager. Information based on Portfolio Manager is indicated in the PM Benchmarking Data field.

The QA/QC Module calculates and displays the percentage of covered energy use for covered facilities. This module also displays the square footage, where evaluations have been completed for each 4-year evaluation cycle, remaining square footage, and the total covered square footage.

After all updates are completed, submit the data by selecting the gold 'Complete EISA S432 Covered Status' button on the bottom of the data entry module. Lastly, this data must be approved by a manager on the Completion Status module.

Guidance and details on the fields is presented below:

EISA S432 Evaluation Fields:

- **Covered Facility?:** Using the drop-down menu, select "Covered" or "Not Covered" to identify if the facility is covered and subject to the EISA S432 requirements. In general, at least 75% of the Site's total energy consumption must be considered "Covered." This field will mirror what is selected in the Facility Goal Category module.
- **Benchmarking with Portfolio Manager:** This is a Dashboard automated field that notifies the user if the benchmarking data is being pulled from the Benchmarking module.
- **Energy Consuming SqFt:** This is a Dashboard calculation based on data entered in the Goal Subject and Excluded Facilities fields on the Facility Goal Category module.
- **FY Energy Use (10⁶ BTU/yr):** This field collects facility level FY Energy Use data. If available, it will be based on uploaded benchmarking data. If there is no data or the data is incomplete, this field will be blank and editable for manual data entry.
- **FY Water Use (10³ BTU/yr):** This field collects facility level FY Water Use data. If available, it will be based on uploaded benchmarking data. If there is no data or the data is incomplete, this field will be blank and editable for manual data entry.
- **Previous 4-Yr Evaluation Cycle (Energy + Water):** This field will show the previous evaluation date from the last completed 4-year evaluation cycle.
- **Current Evaluation (Energy + Water):** Enter the planned or actual evaluation date for the current 4-year cycle of the given facility (Format: MM/DD/YYYY).
- **Evaluation Date is Actual (Energy + Water):** Check this box when the evaluation has been completed and finalized. Ensure the Current Evaluation date is accurate prior to checking this box.

- **Future 4-Yr Evaluation (Energy + Water):** This is an optional planning field that allows the user to enter a future evaluation date for the next 4-year cycle (Format: MM/DD/YYYY).
 - **Evaluation Type/Level:** Select from the drop-down menu the Type/Level of evaluation performed. Evaluation type/levels consist of:
ASHRAE Level 1 – Preliminary or walk-through audit
ASHRAE Level 2 – General audit that expands on Level 1
ASHRAE Level 3 – Comprehensive audit that expands on Level 2
Desk Audit
Other
 - **Describe Other Evaluation Method:** If “Other” is selected from the Evaluation Type/Level, please provide a short description of the method used.
 - **Retro/Re-Commissioning Assessment:** If retro/re-commissioning was completed at the facility, select “Yes” from the drop-down menu, otherwise “No.” For identified retro/re-commissioning measures that have not been funded and completed, report status in measures module.
- Upload Documents:** This function allows the upload of any supplemental documents.

11.2.10 New/Major Renovation Building Design

The New/Major Renovation Building Design category collects data on a site’s new construction and major renovations along with construction requirements for meeting HPSB, EAct 2005 30% better than ASHRAE, EISA Sec. 438 stormwater design, and net-zero design.

For storm water requirements, sites should indicate whether projects over 5,000 square feet “use site planning, design, construction, and maintenance strategies for the property to maintain or restore, to the maximum extent technically feasible, the predevelopment hydrology of the property with regard to the temperature, rate, volume, and duration of flow,” as provided by EPA’s storm water management guidance.

Per Section 109 of EAct 2005, all new federal buildings in design (i.e., CD-1 or lower) as of October 1, 2006, shall be designed such that their energy consumption is 30 percent below the ASHRAE standard.

“FIMS AAIM Facility Information” is pulled directly from FIMS and uploaded to the Dashboard annually. Sites should update the Building Inventory Change category with information on new building construction, major renovations, and replacements. Once the FY is closed, the dashboard will take a snapshot of the data and archive it as the official FY data. If changes need to be made to historical snapshot, submit a change request.

The screenshot shows the 'New/Major Renovation Building Design' form. It features a green header bar with the title. Below the header, there are several input fields and dropdown menus. Red boxes and numbers highlight specific areas: 1. A box around the 'PSO (Lead)', 'Site', and 'Site #' fields. 2. A box around the 'Fiscal Year' dropdown. 3. A box around the 'Data Source' dropdown. 4. A box around the 'Facility Change Type' dropdown. 5. A box around the 'HQ Concurrence' dropdown. 6. A box around the 'Critical Decision Status' dropdown. 7. A box around the 'Search Property Name' and 'Search Property ID' search fields. At the bottom, there is a 'Select Column(s) to View' section with checkboxes for 'Facility Information', 'Statute Compliance', 'ANSI/ASHRAE/IESNA Compliance', 'Anticipated Impact on Sustainability Goals', and 'Other Information'. A green 'Update Search Filter' button is also visible.

1. Site Information: “PSO”, “Site Name”, and “Site Number” are prepopulated.

2. Fiscal Year can be manually selected using the drop-down menu.
3. Data Source: Select from FIMS AAIM or Site Entry.
4. Facility Change Type: You can filter the data by selecting type of change: New, Expansion, Renovation, or Replacement.
5. HQ Concurrence: Select from All, Yes, or No.
6. Critical Decision Status: Filter by the Critical Decision (CD), or equivalent, status of the project by checking one or more of the provided boxes. For a detailed description and requirements of Critical Decisions see DOE Order 413.3B.
7. Search Property Name: This text box allows you to search for a specific property by typing in any keywords in the property's name.

New/Major Renovation Building Design data is focused on design aspects of new construction and major renovations. Guidance on how to complete the Building Inventory Change fields is provided below. The fields should be reviewed annually and updated as needed.

Design

- **For compliance with Section 438 of EISA: If > 5,000 SqFt, will it maintain or restore pre-development hydrology?** Using the drop-down menu, select “Yes” or “No” for compliance with Section 438 of EISA. Per EISA Section 438, new construction — to the maximum extent technically feasible — must have storm water controls as described in EPA’s guidance document, *Technical Guidance on Implementing the Stormwater Runoff Requirements for Federal Projects under Section 438 of the Energy Independence and Security Act*.
- **For compliance with DOE O 436.1: What GP equivalency will the building achieve?** Select from the dropdown: Green Globes, Guiding Principles, LEED® Certified, LEED® Silver, LEED® Gold, LEED® Platinum, Living status, Not Applicable, or None of the Above.
- **For compliance with Section 433 of EISA and E.O. 13693: If > 5,000 SqFt, will the facility be designed to achieve energy and water or waste net-zero?** If the facility is being designed to be net-zero, check all applicable boxes for which it is being designed to be net-zero at (energy, water, waste).
- **Estimated percentage below ANSI/ASHRAE/IESNA Standard 90.1 in terms of energy use:** Based on when design for construction began, enter the anticipated percent below ASHRAE Std 90.1 under the appropriate Standard publication version.
- **If not at least 30% below ANSI/ASHRAE/IESNA Standard 90.1, will design achieve maximum level of energy efficiency that is life-cycle cost-effective?** Using the drop-down menu, select “Yes” or “No” under the appropriate Standard publication version.
- **If not at least 30% below ANSI/ASHRAE/IESNA Standard 90.1, will design achieve maximum level of energy efficiency that will design achieve maximum level of energy efficiency that is life-cycle cost-effective?:** Using the drop-down menu, select “Yes” or “No” under the appropriate Standard publication version.
- **In terms of energy use, percentage below ANSI/ASHRAE/IESNA Standard 90.1 achieved:** For new building construction projects (completions only): enter the percent below ASHRAE Std 90.1 that was actually realized.

Anticipated Impact on Sustainability Goals

- **Excluded from Energy Intensity?** Using the drop-down menu, select “Yes” or “No”, if the facility will be excluded from the energy intensity goal.
- **Anticipated Electricity Usage (kWh/Yr):** Enter the project’s expected annual electricity use in terms of kilowatt-hours per year. If not known, enter “TBD.” If no consumption, enter “0.”
- **Anticipated Natural Gas Usage (10³ Cubic Feet/Yr):** Enter the project’s expected annual natural gas use in terms of thousands of cubic feet per year. If not known, enter “TBD.” If no consumption, enter “0.”
- **Anticipated Potable Water Usage (10³ Gal/Yr):** Enter the project’s expected annual potable water usage in terms of thousands of gallons per year. If not known, enter “TBD.” If no consumption, enter “0.”
- **Anticipated ILA Water Usage (10³ Gal/Yr):** Enter the project’s expected annual non-potable freshwater water usage in terms of thousands of gallons per year. If not known, enter “TBD.” If no consumption, enter “0.”
- **Anticipated Other Energy Usage (10³ BTU/Yr):** Enter the project’s expected annual other energy usage in terms of thousands of British thermal units per year. If not known, enter “TBD.” If no consumption, enter “0.”
- **What is Other Energy?** Using the drop-down menu, select the energy type.

Other Information

- **Critical Decision or Equivalent Status:** Using the drop-down menu, select the most current Critical Decision (CD) or equivalent status of the project: CD-0 Approve Mission Need, CD-1 Approve Alternative Selection & Cost Range, CD-2 Approve Performance Baseline, CD-3 Approve Start of Construction, CD-4 Approve Start of Operations, or Project Completion Cancelled.
- **Date of Critical Decision or Equivalent Status:** Enter the actual date when the project was approved for its current status. Date must be entered as MM/DD/YYYY.
- **Upload Documents:** Upload any additional documents.
- **Additional Information:** Enter any additional notes on the building.

11.3 VEHICLES & EQUIPMENT

This section contains sustainability data reporting on the following categories: Non-Fleet Vehicles & Equipment Fuel, Fugitives & Refrigerants, Fleet Vehicle Fuel, Fleet Vehicle Inventory, and Fleet Vehicles Mileage.

11.3.1 Non-Fleet Vehicles & Equipment Fuel

The Non-Fleet Vehicles & Equipment Fuel data category is focused on the types of fuels consumed in sources not accounted for through Federal Automotive Statistical Tool (FAST). Guidance on how to complete the Non-Fleet Vehicles & Equipment Fuel entry fields is provided below:

- **Category:** There are no entry options for this field because there are no additional categories applicable except for Non-Fleet Vehicles & Equipment Fuel.
- **Subcategory:** Using the drop-down menu provided, select the type of non-fleet vehicles for which data entry is required. The options are Aviation, Generator, Landscaping Equipment, and Other.

- If *Other* is selected, a field titled “Other Vehicles and Equipment” is automatically generated below the Subcategory drop-down box. Use this field to describe the activity that the fuel was used for.
- **Fuel/Material:** Select the type of fuel or material that was used to power the non-fleet vehicle, using the drop-down menu. The options are Aviation Gas, Biodiesel – B100, Biodiesel – B20, Biodiesel – B5, Compressed Natural Gas (CNG), Diesel, E-85, Ethanol, Gasoline, Jet Fuel, Kerosene-type Jet Fuel, Liquefied Natural Gas (LNG), Liquefied Petroleum Gas (LPG), Navy Special, and Other.
 - If *Other* is selected, the Dashboard will automatically generate several fields for the user to fill in manually. The fields that will come up are described below:
- **Other:** Enter what type of fuel (that is *not* present in the drop-down above) was used by the Non-Fleet Vehicles or Equipment here.
- **Other High Heat Value (HHV):** Enter the High Heat Value for the Fuel/Material that was entered in the “Other” field above. Use the “Additional Information” field to describe the units entered for HHV.
- **Other CO₂ Emission Factor (kgCO₂/MMBtu):** Enter the CO₂ Emission Factor (in kgCO₂ per MMBtu) for the Fuel/Material that was entered in the “Other” field above.
- **Other CH₄ Emission Factor (kgCH₄/MMBtu):** Enter the CH₄ Emission Factor (in kgCH₄ per MMBtu) for the Fuel/Material that was entered in the “Other” field above.
- **Other N₂O Emission Factor (kgN₂O/MMBtu):** Enter the N₂O Emission Factor for the Fuel/Material that was entered in the “Other” field above.
- **Data Entry Period Type:** Select the type of period breakdown that the site will be using to enter non-fleet vehicle data. The two options are Fiscal Year by Quarter and Fiscal Year by Month.
 - *Fiscal Year by Quarter:* When this option is selected, the Dashboard automatically refreshes the page to add fields for each quarter’s non-fleet vehicle fuel purchases and the associated quarterly cost whole dollars. Enter the amount of non-fleet vehicle fuel purchased for each quarter and the costs in the applicable fields.
 - *Fiscal Year by Month:* When this option is selected, the Dashboard will automatically refresh the page to add fields for each month’s totals in non-fleet vehicle fuel purchases and the associated monthly cost of those purchases in whole dollars. Enter the amount of non-fleet vehicle fuel purchased in each month and the costs in the applicable fields.
- **Usage Unit:** This field will automatically bring up the appropriate units for the “Fuel/Material” that the user selects. For example, *Aviation Gas* must be reported in thousands of gallons, while compressed natural gas (*CNG*) must be reported in millions of BTUs.
- **Billing Reference:** If the site non-fleet vehicle fuel data has associated billing information, enter the reference information (billing numbers, etc.) in this field. Data entry into this field is optional.
- **Additional Information (Optional):** If the site non-fleet vehicle fuel data has associated billing information, enter the reference information (billing numbers, etc.) in this field. Data entry into this field is optional.

11.3.2 Fugitives & Refrigerants

The Fugitives & Refrigerants data category is focused on the site's fugitive emissions data and refrigerant use. Users should be prepared with information relating to the types of refrigerants used over the course of the year.

The Dashboard records information by material type: mixed refrigerants (e.g., "R-" materials), fluorinated gases (e.g., PFC, HFC, SF₆), and other fugitives (e.g., CO₂, CH₄).

Fugitive & Refrigerants Fields:

- **Category:** Using the drop-down menu, select the type of Fugitives or Refrigerants that the site is reporting. The three options for "Category" are: Mixed Refrigerants, Fluorinated Gases, and Other Fugitives.
 - **Mixed Refrigerants:** When this option is selected, a new drop-down menu for the "Material Type" field is automatically generated. Using this new menu, select the appropriate "Material Type". The next field ("Composition") will automatically be filled with the appropriate reporting units for that material.
 - **Fluorinated Gases:** With this option selected, a new drop-down menu for the "Material Type" field is automatically generated. Using this new menu, select the appropriate "Material Type". The next field ("Composition") will automatically be filled with the appropriate reporting units for that material.
 - **Other Fugitives:** With this option selected, a new drop-down menu for the "Material Type" field is automatically generated. Using this new menu, select the appropriate "Material Type". The next field ("Composition") will automatically be filled with the appropriate reporting units for that material.
- **Composition:** This field will contain the appropriate units for the "Category" and "Material Type" selected in the fields above. There will be nothing manually entered into this field, unless the *Other* option is selected under "Material Type." If *Other* is selected, the Dashboard will generate the following fields:
 - **Other Material Type:** Enter the material being reported here. Only use this option if the "Material Type" the site must report is not on the drop-down lists above.
 - **Composition:** Enter the chemical composition of the material being reported. For example: nitrous oxide would be entered as N₂O.
 - **Global Warming Potential (100 yr):** Enter the 100-year global warming potential of the material being reported.
- **Process Type:** Using the drop-down menu provided, select the "Process Type" that most accurately describes how the Fugitives and/or refrigerants are being utilized by the site. The default *Whole Site/Lab* option should be used if the fugitive emission is not associated with a specific process. If *Other* is selected, a field titled "Other Process Type" is automatically generated below the "Process Type" drop-down box. Use this field to describe the process.
- **Data Entry Period Type:** Select the type of period breakdown that the site will be using to enter fugitives data. The three options are:
 - **Fiscal Year:** Enter the amount of Fugitives & Refrigerants used during the Fiscal Year (October 1st through September 30th).
 - **Calendar Year:** Enter the amount of Fugitives & Refrigerants used during the Calendar Year (January 1st through December 31st).
 - **3-Year Rolling Average:** Select this option if data entry will be using site 3-year rolling average data.

- **Reporting Approach:** Using the drop-down menu provided, select the preferred “Reporting Approach.” Note that selecting each option will result in the Dashboard reloading new reporting fields into the Data Entry Module. The user can select from the following options:
 - **Default:** Selecting this option will present the user with the following fields below that must be completed:
 - **Quantity Purchased or Issued (lbs.):** Enter the quantity of the Fugitives & Refrigerants purchased or issued by weight (pounds).
 - **Quantity Returned to Supply (lbs.):** Enter the quantity of the Fugitives & Refrigerants Returned to Supply (in pounds).
 - **Simplified Material Balance:** This “Reporting Approach” field enables the user to enter site data based on the balance of Fugitive & Refrigerant materials inventoried on site. Selecting this option will result in the page automatically loading the following fields that must be completed by the user:
 - **Quantity in storage at beginning of inventory year (lbs.):** Enter (in lbs.) the amount of Fugitives & Refrigerants stored in site inventory at the beginning of the inventory year.
 - **Quantity in storage at end of inventory year (lbs.):** Enter (in lbs.) the amount of Fugitives & Refrigerants stored in site inventory at the end of the inventory year.
 - **Sum of all refrigerant acquisitions (lbs.):** Enter (in lbs.) the total weight of all refrigerants acquired by the site over the year.
 - **Sum of all refrigerant disbursements (lbs.):** Enter (in lbs.) the total weight of all refrigerants disbursed by the site over the year.
 - **Total capacity of refrigerant in equipment at beginning of inventory year (lbs.):** Enter (in lbs.) the total amount of refrigerant that can be stored in equipment at the beginning of the inventory year.
 - **Total capacity of refrigerant in equipment at end of year (lbs.):** Enter (in lbs.) the total amount of refrigerant that can be stored in equipment at the end of the inventory year.
- **Cost (\$, Optional):** Enter the cost of the Fugitives & Refrigerants in this field.
- **Billing Reference:** If the site fugitives & refrigerants data has associated billing information, enter the reference information (billing numbers, etc.) in this field. Data entry into this field is optional.
- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. Data entry for this field is optional.

11.3.3 Fleet Vehicle – Fuel, Inventory, & Mileage

The Fleet Vehicle categories provide a way to view data regarding fuel use, inventory, and mileage. **All data entry must be performed through FAST and according to FAST guidelines.** The Dashboard will automatically upload current year FAST data as it becomes available - typically in late December. This data can be viewed by the user through the use of several filters that appear above the data table.

Fleet Vehicle Fuel (Data from FAST)

1 PSO: EE Site: National Renewable Energy Laboratory Site #: 5001

2 Fleet Parent: Office of Energy Efficiency and Renewable Energy Fleet Name: National Renewable Energy Laboratory 3 Fiscal Year: 2014 4

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| State | EO-Covered Fuel | Vehicle Exemption | Fuel Armored | Fuel Group | Fuel Name | Fuel Type | Fuel Consumption (GGE) | Fuel Consumption (NU) | Fuel Natural Units | Fuel GGE Conservation Factor | Fuel Cost (\$) | GHG Emissions (MTCO2e) |
|--------------------------|-----------------|-------------------|--------------|-------------|-----------|-----------|------------------------|-----------------------|--------------------|------------------------------|-----------------|------------------------|
| Grand Total | | | | | | | 25,147 | 28,972 | | | \$76,781 | 140.8458 |
| CO | No | E/ER | No | Alternative | E-85 | E85 | 3,376 | 4,690 | gallons | 0.72 | \$16,840 | 4.5080 |
| CO | No | LE | No | Alternative | E-85 | E85 | 46 | 64 | gallons | 0.72 | \$230 | 0.0614 |
| CO | No | None | No | Alternative | E-85 | E85 | 7,668 | 10,651 | gallons | 0.72 | \$38,380 | 10.2391 |
| Alternative Total | | | | | | | 11,090 | 15,405 | | | \$55,450 | 14.8085 |
| CO | No | E/ER | No | Petroleum | Gasoline | GAS | 942 | 942 | gallons | 1 | \$3,288 | 8.3454 |
| CO | No | LE | No | Petroleum | Gasoline | GAS | 543 | 543 | gallons | 1 | \$1,895 | 4.8106 |
| CO | Yes | None | No | Petroleum | Diesel | DSL | 3,831 | 3,341 | gallons | 1.147 | \$12,997 | 35.4423 |
| CO | Yes | None | No | Petroleum | Gasoline | GAS | 8,741 | 8,741 | gallons | 1 | \$3,151 | 77.4390 |
| Petroleum Total | | | | | | | 14,057 | 13,567 | | | \$21,331 | 126.0373 |

6 Create Fleet Mapping Change Request

Please update historical and current data using the Federal Automotive Statistical Tool.

The Fleet Vehicle Fuel filters are highlighted above as an example. The explanation for each highlighted box is given below:

1. Site Information: "PSO", "Site Name", and "Site Number" are prepopulated.
2. Fleet Parent: provides a drop-down menu that allows the user to select the agency or office that controls the fleet of vehicles in question.
3. Fleet Name: allows the user to select from a list of vehicle fleets associated with the user's site and credentials.
4. Fiscal Year: Different fiscal years can be selected for data viewing.
5. Data Table: Information entered under FAST will be displayed in this area.
6. Create Fleet Mapping Change Request Button: Fleet names in FAST differ from site names in the Dashboard. In 2009, the fleet names in FAST were mapped to match the main site names. The fleet fuel data on this page reflects this adjusted mapping. If the fleet names in the drop-down filter are incorrect, a request may be submitted to the Dashboard team change the mapping. The Fleet Vehicle Inventory page will have additional filters as shown below:

Fleet Vehicle Inventory

PSO: EE Site: National Renewable Energy Laboratory Site #: 5001

Fleet Parent: -- Will Have Available Fleet Parents for Site -- Fleet Name: -- Will Have Available Fleet Names for Site -- Fiscal Year: 2016

Report Type: -- Select One -- 1 Data Type: -- Select One -- 2 Locale: All 3

Create Fleet Mapping Change Request

Please update historical and current data using the Federal Automotive Statistical Tool.

1. Report Type: There are three options available from the drop-down menu on this filter – *Acquisition*, *Disposal*, and *Inventory*. Acquisition reports show vehicles acquired over the fiscal year. Disposal reports show vehicles disposed of over the year. Inventory reports show the vehicle inventory for the fleet/site selected.
2. Data Type: The drop-down menu provides four options. Users can selected Actual +0, Planned +1, Projected +2, or Forecast +3.
3. Locale: The location of the vehicle fleet is the subject of this filter. Data can be refined by two options, either *All* or *Domestic*.

11.4 TRAVEL & COMMUTE

This section provides guidance for the Air Travel, Ground Travel, and Commute data categories.

11.4.1 Air Travel

The Air Travel data category is primarily focused on the site's use of air travel for transportation and associated GHG emissions. Users should be prepared with data on the number of air miles travelled by their contractor employees. SPO will upload federal travel data from Concur on behalf of all sites. Guidance on how to complete the Air Travel entry for contractors is below:

Air Travel Fields

- **Category:** This field is already populated with *Business Air Travel*, as there are no other options for Air Travel.
- **Fuel Type:** This field is already populated with *Jet Fuel*, as there are no other options for Air Travel.
- **Employee Type:**
 - **Federal:** If data entry is required for Federal personnel (i.e., only required if Federal data is not to be uploaded by SPO), select the *Federal* option from the "Employee Type" drop-down menu if the user intends to enter data for Federal employees. Then the Dashboard will automatically generate the following fields that must be completed prior to submission:
 - **GSA Organization Name:** Enter the name of the GSA organization.
 - **GSA Travel MIS:** Enter the value from Concur Government Edition in lbs. CO₂. Alternatively, the fields below can be used to provide more details by flight type in miles.
 - **Usage Unit:** Data must be entered in lbs. CO₂, so this field cannot be changed.
 - **Contractor:** Select *Contractor* from the "Employee Type" drop-down menu if the user intends to enter Air Travel data for Contracted employees. Then the Dashboard will automatically generate the following fields that must be completed prior to submission:
 - **Contractor Name or Designation:** Enter contractor's identifying information.
 - **Flight Type:** Enter the total miles traveled by haul type (distance).
 - **Short Haul (<300 miles) Usage Amount:** Enter the number of miles logged by selected personnel (Federal or Contractor) for trips of a short duration: less than 300 miles.
 - **Medium Haul (300 miles ≤ x < 700 miles) Usage Amount:** Enter the number of miles logged by selected personnel (Federal or Contractor) for trips of Medium duration between 300 and 700 miles.
 - **Long Haul (≥ 700 miles) Usage Amount:** Enter the number of miles logged by selected personnel (Federal or Contractor) for trips of long duration: greater than 700 miles.

- **Unknown Usage Amount:** Enter the number of miles logged by Federal personnel for which the breakout by Short, Medium, or Long Haul is unknown.
- **Cost (\$, Optional):** Enter the total cost of Business Air Travel if data is available.
- **Billing Reference (Optional):** If site air travel data has associated billing data, enter the reference information (e.g., billing numbers) in this field. Data entry for this field is optional.
- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. Data entry for this field is optional.

11.4.2 Ground Travel

The Ground Travel data category is primarily focused on the site’s use of ground travel for transportation and associated GHG emissions. Users should be prepared with ground travel mileage and fuel efficiency data. Guidance for completing the Ground Travel data category is provided below.

Ground Travel Fields:

- **Category:** This field is already populated with *Business Ground Travel*, as there are no other options for Categories under Ground Travel.
- **Employee Type:**
 - **Federal:** If data entry is required for Federal personnel (i.e., only required if Federal data is not to be uploaded by SPO), select the *Federal* option from the “Employee Type” drop-down menu. Then the Dashboard will automatically generate the following fields that must be completed prior to submission:
 - **GSA Organization Name:** Enter the name of the GSA organization.
 - **Reporting Methodologies:** Select the appropriate methodologies for reporting.
 - *GSA Travel MIS:* Enter the cumulative Federal business miles traveled using ground transportation (in total miles traveled).
 - *Rental and Mass:* Use the first column to enter the total number of Federal agency/business ground travel trips and use the second column to enter the average miles per trip for each classification (e.g., passenger car, SUV or truck, bus, rail). If the average miles per trip is unknown, click the “Check for Default” box to populate with the default averages.
 - *Rental, Personal, Taxi Miles, by Fuel Type:* Enter the cumulative Federal business miles traveled using ground transportation (in total miles traveled) by each classification of fuel type (i.e., gasoline for passenger car, gasoline for SUV or truck, diesel for SUV or truck).
 - *Rental and Personal Vehicle Mileage by Class:* Enter the cumulative Federal business miles traveled using ground transportation by each classification of vehicle (in total miles traveled).

- **Rental Direct Fuel Purchase:** This data entry option allows the user to report the amount of fuel purchased for site business travel using ground transportation and the average number of miles that vehicles travel per trip. In the first column, enter the total quantity of fuel purchased for each vehicle classification (in gallons). In the second column, enter the average miles per gallon of each of these vehicle classes used for Federal business ground transport. If the average miles per gallon is unknown, click the “Check for Default” box to populate with the default averages.
 - **Contractor:** If data entry is required for Contracted personnel, select *Contractor* from the “Employee Type” drop-down menu. Then the Dashboard will automatically generate the following fields that must be completed prior to submission:
 - **Contractor Name or Designation:** Enter the name of the contractor or the contractor designation.
 - **Reporting Methodologies:** Select the appropriate methodologies for reporting.
 - **Rental and Mass:** Use the first column to enter the total number of contractor agency/business ground travel trips and use the second column to enter the average miles per trip for each classification (e.g., passenger car, SUV or truck, bus, rail). If the average miles per trip is unknown, click the “Check for Default” box to populate with the default averages.
 - **Rental, Personal, Taxi Miles, by Fuel Type:** Enter the cumulative contractor business miles traveled using ground transportation (in total miles traveled) by each classification of fuel type (i.e., gasoline for passenger car, gasoline for SUV or truck, diesel for SUV or truck).
 - **Rental and Personal Vehicle Mileage by Class:** Enter the cumulative contractor business miles traveled using ground transportation by each classification of vehicle (in total miles traveled).
 - **Rental Direct Fuel Purchase:** This data entry option allows the user to report the amount of fuel purchased for site business travel using ground transportation and the average number of miles that vehicles travel per trip. In the first column, enter the total quantity of fuel purchased for each vehicle classification (in gallons). In the second column, enter the average miles per gallon of each of these vehicle classes used for contractor business ground transport. If the average miles per gallon is unknown, click the “Check for Default” box to populate with the default averages.
- **Cost (\$, Optional):** Enter the total cost of Business Ground Travel if data is available.
- **Billing Reference (Optional):** If site ground travel data has associated billing data, enter the reference information (e.g., billing numbers) in this field. Data entry for this field is optional.

- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. Data entry for this field is optional.

11.4.3 Commute

The Commute data category is primarily focused on site personnel commuting habits. Users should be prepared with commuting data for their employees, including miles traveled and mode of transportation. Guidance on how to complete the Commute entry form is provided below.

- **Category:** This field is already populated with *Commuter Travel*, as there are no additional data entry options for this page.
- **Frequency of Collection:** Using the drop-down menu, select the option that most accurately describes the site’s commuter data collection frequency. The options are annually, monthly, quarterly, or bi-annually.
- **Name/Designation:** Enter a custom name for the data being entered. One potential use for this field is if commute data for multiple contractors is being entered and the user wishes to enter them separately rather than aggregate in a single entry.
- **Employee Type:** Using the drop-down menu, select the personnel breakdown for how data will be entered for the site. If only Federal employee data is to be entered (or separate entry), or if only contractor data is to be entered (or separate entry), select either one of those options. If both Federal and contractor data is to be entered together, pick the combined option.
- **Reporting Methodologies:** The Reporting Methodologies section presents the user with four checkboxes that each allow for different types of data entry. These options are single occupant (personally owned vehicle), car/van pool, mass transit, and human powered. The user should only select the boxes for which they wish to enter data.
 - **Single Occupant, Personally Owned Vehicle:** In the first column, enter the total number of miles driven per day for each type of vehicle. In the second column, enter the average commute days per year for the corresponding vehicle/fuel combination. If the average commute days per year is unknown, click the “Check for Default” box to populate with the default averages.
 - **Car/Van Pool:** In the first column, enter the total amount of miles traveled per day. In the second column, enter the average commute days per year for each vehicle/fuel combination as appropriate. If the average commute days per year is unknown, click the “Check for Default” box to populate with the default averages.
 - **Mass Transit:** In the first column, enter the total mileage for each transportation type/fuel combination as appropriate. In the second column, enter the average commute days per year. If the average commute days per year is unknown, click the “Check for Default” box to populate with the default averages.
 - **Human Powered:** In the first column, enter total miles traveled or avoided per day by all employees for Walking, Cycling, and Teleworking. In the second column, enter the average commute days per year for the corresponding transportation mode. If the average commute days per year is unknown, click the “Check for Default” box to populate with the default averages.

Note: You must enter both miles per day AND average commute days per year for the GHG calculations to work. There are currently no GHG calculations for teleworking.

- **Collection Method:** The preferred method of data collection is through an employee survey on commuting habits. If that is not an available option at your site, other methods could include parking lot audits or employee HR records (e.g., using zip code to estimate travel distance).
- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. Data entry for this field is optional.

11.5 WASTE

Waste related sustainability data includes categories for Municipal Solid Waste, Waste Diversion, and Wastewater Treatment.

11.5.1 Municipal Solid Waste

The Landfill & Municipal Solid Waste data category is primarily focused on the site's diffusion of waste-to-waste facilities and landfills. Users should be prepared with data on how waste was disposed of, where that waste was sent, and the gas collection processes of those sites (if applicable). Guidance for completing the Landfills & Municipal Solid Waste data category is provided below.

Municipal Solid Waste Fields:

- **Category:** Using the drop-down menu, select whether the data is for On-Site waste or for Off-Site/Contracted waste. The Dashboard will automatically update the fields and generate the appropriate fields needed to complete the "Category."
 - **Off-Site/Contracted Category:**
 - **Data Entry Period Type:** The only option for this field is Fiscal Year, so it will be already populated without any additional options.
 - **Landfill Name/ Designation:** Enter the name of the landfill to which waste was directed.
 - **Contractor Name/ Designation (Optional):** Optional field to report contractor identifying information if reporting for multiple site contractors.
 - **Amount of Waste Sent to Landfill:** Enter the total weight of all non-hazardous solid waste sent to the landfill.
 - **Waste Units:** For the waste amount entered in the field above, use the drop-down menu to select the appropriate units that the site is using to report this data. The options are Metric Tons or Short Tons.
 - **Was this waste sent to a landfill owned by another DOE site?:** Using the drop-down menu, select either *Yes* or *No*.

Yes: If the waste was sent to a landfill owned by another DOE site, select a site from the drop-down menu.

No: If the waste was not sent to a landfill owned by another DOE site, select "No" from the drop-down menu. The user must then respond to the

question presented in the next field: **“Do you know the properties of the landfill and its generated gas from your waste contractor?”** *No* is the default answer to this question. However, if *Yes* is selected, you will be required to fill in the following table:

| | |
|--|------------------|
| Do you know the properties of the landfill and its generated gas from your waste contractor? | Yes (Advanced) ▼ |
| Landfill and Gas Properties | |
| Degradable Organic Content (DOC) (Metric tons C / Metric tons waste): | 0.203 |
| DOC Digestible Under Conditions at the Landfill (%): | 50 % |
| Methane Correction Factor / Uncontrolled release of CO ₂ : | 100 % |
| Fraction of CH ₄ in generated landfill gas (% volume): | 50 % |

- “Does the landfill utilize gas collection”. If *Yes*, enter the gas collection percentages of several key gases of the landfill in question. Select *No*, if your landfill does not collect gas, and *Unsure* to auto populate the fields with default percentages.
- **On-Site Category**
 - **Data Entry Period Type:** The only option for this field is Fiscal Year, so it will be already populated without any additional options.
 - **Landfill Name/ Designation:** Enter the name of the landfill to which waste was directed.
 - **Contractor Name/ Designation (Optional):** Optional field to report contractor identifying information if reporting for multiple site contractors.
 - **Data Entry Method:** LandGEM (Landfill Gas Emissions Model) data is required for this Category. The drop-down menu for this field gives the user the option to enter the LandGEM data manually or upload a LandGEM XLS File. The upload module is set up to record the necessary values from the default file from EPA and may not record the proper values if rows or columns have been added to EPA’s default file. If *Manually Enter LandGEM Data* is selected, then the user will be required to fill out the remainder of the fields on the Data Entry Module.
 - **Default Type:** Using the drop-down menu, select the LandGEM parameters used to estimate emissions. The options are:
 - Clean Air Act (CAA):** The CAA defaults are based on requirements for MSW landfills laid out by the Clean Air Act (CAA), including the NSPS/EG and NESHAP. This set of default parameters yields conservative emission estimates and can be used for determining whether a landfill is subject to the control requirements of the NSPS/EG or NESHAP. Inventory, based on EPA’s Compilation of Air Pollutant Emission Factors (AP-42): The inventory defaults, with the exception of wet landfill defaults,

are based on emission factors in the U.S. Environmental Protection Agency's (EPA's) Compilation of Air Pollutant Emission Factors (AP-42). This set of defaults yields average emissions and can be used to generate emission estimates for use in emission inventories and air permits in the absence of site-specific test data.

- **Landfill Type:** Using the drop-down menu, select the LandGEM landfill type parameters. The options are:
Conventional: Default option for landfill type with no leachate or liquid additions.
Arid Area: For landfills located in areas that receive less than 25 inches of rainfall per year.
Wet (Bioreactor): For landfills where leachate and other liquids are added to accelerate waste decomposition. Only available if the Default Type is Inventory.
- **Amount of Waste Sent to Landfill:** Enter the total weight of all non-hazardous solid waste sent to the landfill.
- **Waste Units:** For the waste amount entered in the field above, use the drop-down menu to select the appropriate units: Metric Tons or Short Tons.
- **Landfill Open Year:** Enter the four-digit year in which the landfill was opened.
- **Landfill Close Year:** Enter the four-digit year in which the landfill was closed (if applicable). Note, a GHG value is not calculated for landfills closed before 1/1/1980 and they do not impact your GHG goal performance. Reporting of on-site landfills that closed before 1/1/1980 is optional but recommended should reporting requirements change.
- **LandGEM Generated CH₄ (Mg/year):** Enter the amount of methane (measured in Mg per year) that was generated by the aforementioned landfill.
- **LandGEM Generated CO₂ (Mg/year):** Enter the amount of carbon dioxide (measured in Mg per year) that was generated by the aforementioned landfill.
- **Does the entered value include waste that was accepted from another DOE site?** If waste was accepted from another DOE site, select *Yes* from the drop-down menu. If not, select *No*. When an option is selected from this menu, the page will automatically update to generate the fields necessary for data completion. When the *Yes* option is selected, you will be asked to enter the waste amount of the waste reported above that is attributed solely to the user's site. If the *No* option is selected, the above fields will not appear.
- **Does the Landfill utilize gas collection?**
Using the drop-down menu, select the option that most accurately describes the landfill's gas collection status. If the landfill utilizes gas collection, select *Yes*. If not, select *No*. If uncertain, pick *Unsure (Default)*. When an option is selected from this menu, the page will automatically refresh to generate the fields necessary for data entry completion.

Note: when any of the options are selected, the Dashboard displays the required fields for completion. If *Unsure (Default)* is selected, the default values are auto populated.

If Yes is selected, the site will enable the user to make changes.

Uncontrolled Release of CH₄ (%): Enter % (by volume) of CH₄ lost in uncontrolled and enter information on how it was obtained in the “Additional Information” field.

Uncontrolled Release of CO₂ (%): Enter % (by volume) of CO₂ lost in uncontrolled and enter information on how it was obtained in the “Additional Information” field.

Methotropic Oxidation Factor (%): Enter % (by volume) of CO₂ lost in uncontrolled and enter information on how it was obtained in the “Additional Information” field.

Landfill Gas Collection Efficiency (%): Enter an efficiency of the gas collection system and enter information on how it was obtained in “Additional Information” field.

Landfill Gas Collection Venting Loss (%): Enter an efficiency of the venting losses of the gas collection system and enter information on how it was obtained in “Additional Information” field.

Combustion Oxidation Factor (%): Enter the combustion oxidation factor and enter information on how it was obtained in “Additional Information” field.

The fields above are advanced data entry fields and require data from the landfill operator to be completed. If you have not requested this data from the landfill operator or the landfill operator does not know this information, leave the default values in place.

If the user selects *No* from the drop-down menu, you will be prompted to enter if the landfill utilizes gas collection (Yes/No) and the uncontrolled release of CH₄ and CO₂ (%) are automatically calculated and cannot be changed.

- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. Data entry for this field is optional.

11.5.2 Waste Diversion

The Waste Diversion data category is primarily focused on the diversion of MSW and Construction & Demolition wastes from the user’s site to landfills or other waste facilities. The facilities considered here can be on- or off-site. Users should be prepared with data on how much waste was dispersed, including how much was sent through recycling or composting processes. Guidance on how to complete the Waste Diversion data category is provided below.

Note: Reused waste is not included in waste diversion calculations. Additionally, per Federal guidelines Waste to Energy (WTE) is converted to a waste to energy credit, which is calculated by adding the recycled + on-site compost + off-site compost + other diverted waste and then dividing this number by two. If this WTE credit is less than the initial WTE value reported, then the credit value is used in determining diversion calculations. If the credit is more than the initial WTE value, the initial WTE value is used to calculate diverted waste.

Waste Diversion Fields:

- **Category:** The drop-down menu for Category has two options: *Municipal Solid Waste* and *Construction & Demolition*. Each option has a different set of sub-fields that will appear after the user selects their category. For *Municipal Solid Waste*, the following fields will appear:
 - **Municipal Solid Waste Category:**
 - **Data Entry Period Type:** This field will be already populated with *Fiscal Year*, as it is the required period type.
 - **Waste Sent to Off-Site Landfills (Metric Tons):** This value comes from your MSW Off-Site section data and will be automatically generated here (if MSW data entry is complete).
 - **Waste Sent to On-Site Landfills (Metric Tons):** This value comes from your MSW On-Site section data and will be automatically generated here (if MSW data entry is complete).
 - **Waste Units:** For the waste amount entered, use the drop-down menu to select the appropriate units: Metric Tons or Short Tons.
 - **Waste to Energy:** Enter the total amount of MSW that was sent to a Waste to Energy (WTE) facility. For the purposes of Federal goals, this waste is not considered diverted.
 - **Recycled:** Enter the amount of MSW that was recycled.
 - **On-Site Composting:** Enter the total amount of MSW that was used for On-Site composting.
 - **Off-site Composting:** Enter the total amount of MSW that was used for Off-Site composting.
 - **Reused:** Enter the total amount of MSW that was salvaged for reuse.
 - **Other Diversion:** Enter the total amount of MSW that was diverted for other reasons or purposes. Use the “Additional Information” field at the bottom to provide a description of the diversion(s).
 - **Construction & Demolition Category:**
 - **Data Entry Period Type:** This field will be automatically populated with *Fiscal Year*, as it is the required period type.
 - **Waste Units:** For the waste amount entered, use the drop-down menu to select the appropriate units: Metric Tons or Short Tons.
 - **C&D Waste Sent to Landfills:** Enter the amount of C&D waste sent to landfills over this Fiscal Year.
 - **C&D Waste Recycled:** Enter the amount of C&D waste recycled for this Fiscal Year.
 - **C&D Waste Other Diverted:** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form, such as tracking methodology, if weights are actual, estimated, or a combination, and notes on what is or is not tracked. Data entry for this field is optional.

11.5.3 Wastewater Treatment

The Wastewater Treatment data category is primarily focused on data collection for site personnel who are served by wastewater treatment (WWT) processes. The user should be prepared with a complete assessment on how wastewater is treated at WWT facilities and be able to calculate how many (or what percentage) of the site’s personnel are impacted by each. Guidance on how to complete the Wastewater Treatment data category is provided below.

Wastewater Treatment Fields:

- **Reporting Period Type:** This field is already populated, as Fiscal Year is the required reporting period type.
- **Plant Name/Designation:** Enter the name or designated title of the wastewater treatment plant for which data is being entered.
- **Contractor Name/Designation (Optional):** Enter the name or designated title of the contractor.
- **Category: On-Site:** If the user’s site has on-site wastewater treatment facilities, use the Category drop-down menu to select *On-Site*. The Dashboard refreshes the page to add/remove fields necessary for completing data entry. Once the fields have updated, fill in the following fields:
 - **Number of Employees Served by WWT System:** Use this field to enter the total number of employees serviced by the wastewater treatment system (WWT) that is on-site.
 - **Workdays per year:** The number “230” is automatically entered here, as this is the default value for Federal workdays. If your site has any deviation, delete the default entry and enter the appropriate number of workdays.
 - **How would you like to enter the treatment process breakdown?:** Using the drop-down menu, select how you would like to enter the WWT data. Site WWT data can be entered by total persons served or by the percentage of the total population. When each option is selected, the data entry fields beneath the drop-down menu are switched.
 - When *Persons Served* is selected, note that the fields beneath the column heading “People Served” are open for data entry and the fields under the column heading “Percentage of Population Served” are locked. For each field, enter the number of site personnel who are serviced by the WWT system listed. If one of these options is not present at the site, enter 0 (zero).

| | Percentage of Population Served | People Served |
|---|-------------------------------------|--------------------------------|
| Centralized WWTP with Anaerobic Digestion: | <input type="text" value="100"/> % | <input type="text" value="0"/> |
| Centralized WWTP with Nitrification/Denitrification: | <input type="text" value="36.5"/> % | <input type="text" value="0"/> |
| Centralized WWTP without Nitrification/Denitrification: | <input type="text" value="63.5"/> % | <input type="text" value="0"/> |
| Effluent Discharge to Rivers and Estuaries with Nitrification/Denitrification: | <input type="text" value="36.5"/> % | <input type="text" value="0"/> |
| Effluent Discharge to Rivers and Estuaries without Nitrification/Denitrification: | <input type="text" value="63.5"/> % | <input type="text" value="0"/> |
| Wastewater Treatment Lagoons: | <input type="text" value="0"/> % | <input type="text" value="0"/> |
| Septic Systems | <input type="text" value="0"/> % | <input type="text" value="0"/> |

- When *Percentage of Population Served* is selected, the fields are switched. The “People Served” fields are locked while the “Percentage of Population Served” fields are unlocked and ready for data entry.

- **Category: Off-Site/Contracted:** If the user’s site does not have on-site wastewater treatment facilities and has wastewater treated off-site and/or by a contractor, use the Category drop-down menu to select *Off-Site/Contracted*. Fill in the following fields:
 - **Number of Employees Served by WWT System:** Use this field to enter the total number of employees serviced by the wastewater treatment system (WWT) that is on-site.
 - **Workdays per year:** The number “230” is automatically entered here, as this is the default value for Federal workdays. If your site has any deviation, delete the default entry and enter the appropriate number of workdays.
 - **What treatment processes are used?:** Using the drop-down menu, select the way in which you would like to report treatment process data. Explanations of the three available options are provided below. The “Unsure (Default)” value has historically been used by most DOE sites.

When each respective option is selected, the data entry fields below the drop-down box will be automatically updated to present the user with the fields required for completion.

- **Unsure:** If you are uncertain about what WWT processes are being used by the off-site/contracted facility, select this option. All the fields shown below will be locked with this option, as the data required is based on the types of processes used. *Unsure* is the default option for this menu.
- **Partial Manual (Advanced):** When this option is selected from the drop-down menu, the Dashboard automatically generates the required fields for data entry. Because this is a partial manual entry method, only some of the fields will need to be completed. Once *Partial Manual (Advanced)* is selected, the next field will be if you would like to enter the treatment process breakdown, Persons Served, or Percentage of Population Served.

As described above, select whether you would like to enter site data based on the number of site personnel serviced by the WWT facility, or by the percentage of the site population that is serviced by each process type.

If the user selects *People Served* from the drop-down menu, then the fields for entry will be limited to the two indicated in red above. The user must then enter the number of people served by WWTP with nitrification/denitrification and by WWT lagoons. If the user selects *Percentage of Population Served* instead, the fields will flip, requiring the user to enter site population percentage data for WWTP with nitrification/denitrification and WWT lagoons.

- **Full Manual (Advanced):** This option opens all the fields for data entry, hence the name *Full Manual (Advanced)*. After selected, the user will be presented with the option for WWT process breakdown. Each option will either open or lock the fields shown below for WWT processes and the numbers of site personnel served by them. In the image shown below, the “Percentage of Population Served” option is chosen, which opens up all process type fields for the user to enter data. Default values for these

process types are automatically generated. The user must enter site-specific values in the fields in red above.

11.6 MEASURES, FUNDING, & TRAINING

The Measures, Funding, & Training section of the Dashboard includes the following data categories: Conservation & Efficiency Measures, Performance Contracts, Appropriations/Direct Obligations, and Training & Education. Guidance for completing the Evaluations, Measures, & Funding data categories is provided below.

11.6.1 Efficiency & Conservation Measures

The Efficiency and Conservation Measures data category collects information on identified, verified, awarded/funding approved, operational, or cancelled measures and any associated measurement and verification (M&V) data.

Based on information collected on measures, the Dashboard will provide system-calculated financial metrics as defined in the National Institute of Standards and Technology Life-Cycle Cost handbook along with other metrics to assist with selection of measures for funding and assessing performance of operational measures.

11.6.2 Appropriations/Direct Obligations

The Appropriations & Direct Obligations category offers a place to track “direct obligations for facility energy efficiency improvements, including facility surveys/audits” as required by EOs and OMB Circular A-11. These are obligations for energy and/or water efficiency incurred from appropriated funds, revolving fund accounts, or other accounts. Other accounts might include, for example, obligations for purchases of compact fluorescent lights to replace incandescent bulbs, or replacement chillers paid for directly by each site rather than through an energy savings performance contract. These obligations do not include anything to be paid for or financed by a third party (e.g. a utility or energy-savings performance contractor).

The Site Name, PSO, Site Number, Data Entry Period Type, Fiscal Year, and Category will all be prepopulated and locked. Entering your Appropriations & Direct Obligations information is explained below.

Appropriations/Direct Obligation Fields:

- Data Entry Table:** The following image shows the data entry table for the Appropriations & Direct Obligations category. The table explains what information to enter in each column.

| Category: Appropriations & Direct Obligations | | | | | |
|---|--|--|-------------------------------|---|-------------------------------|
| | Obligations for facility energy & water efficiency improvements, including surveys/audits (\$) | Estimated annual energy savings anticipated from obligations | | Estimated annual water savings anticipated from obligations | |
| | | Cost Savings (\$) | Energy Savings (Million BTUs) | Cost Savings (\$) | Water Savings (1,000 Gallons) |
| Actual FY+0 (2024) | | | | | |
| Projected FY+1 (2025) | | | | | |
| Projected FY+2 (2026) | | | | | |

- **Obligations:** In this column enter the dollar amount of obligations for energy and water efficiency improvements for the current fiscal year (Actual FY+0) and the next two fiscal years.
- **Energy and Cost Savings:** In this column enter the cost savings and actual energy savings for the current fiscal year and the projected savings for the next two years.
- **Water and Cost Savings:** In this column enter the actual cost savings and water savings for the current fiscal year and the projected savings for the next two years.
- **Additional Information:** This text box offers a space to enter any additional information you wish to include with your obligations data entries.

11.6.3 Training & Education

EPAct 1992 training covers a broad range of training related to sustainability for facility management and operations. Training can consist of areas such as fundamentals of building energy systems, building energy codes and applicable professional standards, energy accounting and analysis, life-cycle cost methodology, fuel supply and pricing, and instrumentation for energy surveys and audits.

The Training & Education category allows you to track any training and education received by Federal or contractor employees as well as the associated cost.

The Site Name, PSO, Site Number, Data Entry Period Type, Fiscal Year, and Category will all be prepopulated and locked. Entering your training and education information is explained in the table below.

Training & Education Fields:

- **Data Entry Table:** First select the employee type from the drop-down menu. Next, enter the necessary information in each of the text boxes. Use the “Add” button on the far left to add additional rows.

| Category: Training & Education | | | | | |
|--------------------------------|---------------|---------------------|--|-----------|---------------------------------|
| | Employee Type | If Contractor, Name | Number of Employees Trained & Educated | Cost (\$) | Type(s) of Training & Education |
| Add | -- Select -- | | | | |

When counting the number of people who received training, include only people who received organized instruction (e.g. at seminars, workshops, and conferences), not those who received general-information items such as flyers reminding people to turn out lights and turn off computers. The cost of such general information items intended to raise energy awareness among all employees can be included in the training budget entries. However, travel costs associated with this training should also be included in the cost of the training. Some examples of energy management training are:

- Basics of building energy systems.
- Building energy codes and applicable professional standards.

- Energy accounting and analysis.
 - Life-cycle cost methodology.
 - Fuel supply and pricing; and
 - Instrumentation for energy surveys and audits
- **# of Certified Energy Managers (CEMs):** Enter the number of Certified Energy Managers (CEMs) you currently have in the provided text box.
 - **Plans to Train Employees in Becoming CEM(s):** Use this text box to provide information and details on any plans to train employees to become CEMs.
 - **Additional Information:** Enter any additional information or explanations you wish to include in the text box provided.

11.7 ELECTRONIC STEWARDSHIP & DATA CENTERS

This section provides guidance for the Electronics Acquisition, Operations, and End-of-Life data categories.

11.7.1 Electronics Acquisition

The Electronics Acquisition data category's primary objective is to collect data on a site's acquisition of electronics over the course of the fiscal year. The site must report the total number of electronics by category and the number of electronics that are registered on the Electronic Product Environmental Assessment Tool (EPEAT) or any other environmental electronics standard/certification. If reporting a certification or standard other than EPEAT, it is required to provide a description or web link for the certification for verification by SPO. Guidance on how to complete the Electronics Acquisition data category is below.

Electronics Acquisition Data Fields:

- **Category:** This field is already populated with *Electronics Acquisition*, as there are no additional data entry options for this page.
- **Data Entry Period Type:** This field is already populated with *Fiscal Year*, as this is the required reporting period type.
- **Electronic Categories:** Sites should report devices within five Electronics Categories by selecting the appropriate checkboxes: Computers & Displays, Imaging Equipment, Televisions, Mobile Phones, and Servers. Once all appropriate boxes are checked, the Dashboard will generate data entry fields to complete.

The first column contains the subcategories of equipment. In the column labeled "Total # Acquired", enter the total number of electronic devices acquired for each subcategory for the reporting Fiscal Year. In the next three columns, enter the number of those devices that are bronze, silver, and gold level EPEAT-registered. For example, a site might have acquired 10 tablets, of which 5 were Bronze, 3 were Silver, and 2 were Gold.

Similar to the EPEAT classification, in the column labeled "# ENERGY STAR", enter the total number of electronic devices acquired for each subcategory for the reporting Fiscal Year. The last two columns are available to report any certifications other than EPEAT and ENERGY STAR. If reporting a certification or standard other than EPEAT/ENERGY STAR, it is required to use the "Describe" column to give a brief description or web link of the certification for verification purposes.

- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. Data entry for this field is optional.

11.7.2 Electronics Operations

The Electronics Operations data category's primary objective is to collect data on a site's operation of electronics over the course of the fiscal year. Each site must report on electronics for categories that are subject to power management requirements. As defined by the EPA, electronics are considered to be using power management if ENERGY STAR power management features (e.g., sleep, standby, hibernate) are enabled, so that these devices enter a low-power state if they are not in use for specified periods of time (Energy Star recommends "within 30 minutes"). Additionally, the number of printers, copiers, and multi-function devices using Duplex Printing practices must also be reported. Guidance on how to complete the Electronics Operations data category is provided below.

Electronics Operations Data Fields:

- **Category:** This field is already populated with *Electronics Operations*, as there are no additional data entry options for this page.
- **Data Entry Period Type:** This field is already populated with *Fiscal Year*, as this is the required reporting period type.
- **Power Management:** The power management table must be completed. Sites must report a breakdown of the number of owned displays and computers using power management practices as well as the number of those that are not. In the first column, enter the total number of displays/computers that are owned by the site. In the second column, enter the number of those that are exempt from power management practices. In the third column, enter the total number of displays/computers using power management.
Note: As defined by EPEAT, computers include notebooks, desktops (independent of operating system), integrated desktop computers, workstations, and thin clients. Also, laptops, desktops, and monitors are considered exempt from power management requirements if they are running mission critical applications (e.g., facility security, energy or environmental management or other essential operational systems, if they are maintaining continuous process monitoring or control or uninterruptable laboratory experiments).
- **Duplex Printing:** The duplex printing table must be completed. In the first column, enter the total number of printers, copiers, and multi-function devices (MFDs) that the site owns. In the second column, "Number Incapable of Duplex Printing", enter the total number of those printers, copiers, and MFDs that physically cannot perform duplex printing. In the third column, enter the number of those printers, copiers, and MFDs that use duplex printing.
- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. Data entry for this field is optional.

11.7.3 Electronics End-of-Life

The Electronics End-of-Life data category's primary objective is to collect data on a site's electronics disposition practices over the course of the fiscal year. Each site must report the

total number (or weight) of electronics and indicate how many were donated, transferred, recycled through a certified recycler, recycled by a non-certified recycler, or disposed of in a landfill. Guidance on how to complete the Electronics End-of-Life data category is below.

Electronics End-of-Life Data Fields:

- **Category:** This field is already populated with “Electronics End-of-Life”, as there are no additional data entry options for this page.
- **Data Entry Period Type:** This field is already populated with *Fiscal Year*, as this is the required reporting period type.
- **How would you like to enter your recycling data?** Recycling may be reported via three methods: Bulk Weight of Electronics (Preferred), Itemized List of Electronics, or Mixed Weight & Items.
 - **Bulk Weight of Electronics (Preferred):** If selected, this allows the site to report the total weight of electronics transferred/donated, recycled, and disposed of via landfill by the site for the fiscal year. Before entering data in the table, make sure to select the entry units for the weight of bulk electronics (kilograms or pounds).
 - **Itemized List of Electronics:** If selected, this allows the site to report the number of electronics (by type of device) transferred/donated, recycled, and disposed of via landfill by the site for the fiscal year.
Note: See the Dashboard for the full list of types of devices.
 - **Mixed Weight & Items:** If selected, this allows the site to report a combination of the previous two methods (a mix of devices by weight or number depending on which information is available).
Note: Items should not be counted in both entry types (by weight or type of device).
- **What type of recycling services/programs do you participate in?** Site users should select all recycling programs or services in which the site participated during the reporting fiscal year. If the site utilizes a services or program not listed, please describe it in the “Additional Information (Optional)” field. The user will be presented with the following options:
 - GSA Xcess
 - GSA Computers for Learning
 - Unicor
 - USPS BlueEarth Federal Recycling Program
 - Non-Certified Private Recycler
 - Other Certified Recycler (describe in Additional Information)
 - Other (describe in Additional Information)
- **Additional Information (Optional):** This space is provided for users to record important information that cannot otherwise be inputted into the data entry form. Data entry for this field is optional unless “Other Certified Recycler” or “Other” are selected under recycling services/programs.

11.8 ACQUISITION & PROCUREMENT

Agencies are required to promote sustainable acquisition and procurement to ensure environmental performance and considerations for sustainability are included in contracts to the maximum extent possible. Agencies are to include sustainability clauses in all eligible contracts. In addition, agencies should prioritize the use of contract clauses that include preference for

products that are energy-efficient (ENERGY STAR or FEMP designated), water-efficient, and environmentally preferable (e.g., EPEAT-registered, non-ozone depleting, contain recycled content, non-toxic or less-toxic alternatives).

Data on sustainable acquisition contracts and BioPreferred product purchases can be reported through the Federal Procurement Data System (FPDS) and System for Award Management (SAM), respectively. Sites that do not have access to report in FPDS and/or SAM, should submit supplemental workbooks for Sustainable Acquisition Contracts and/or Biobased Product Purchases as a “supporting document” under the *Acquisition & Procurement* section of the SSP Module (see [section 8.6](#)). Please work with your site's Contracting Officer to ensure FPDS/SAM is not already being utilized.

Note: For sustainable acquisition contracts reporting, sites are only required to report whether sustainability clauses were included in the contract(s) and the type of sustainability clause(s) included, not what was actually received/purchased.

11.9 RESILIENCE

11.9.1 Resilience Solution Tracking

The resilience Solution Tracking section will enable you to track resilience solutions by properly including the following fields:

- **Site name, site number, and program office.**
- **Dashboard Unique ID**
 - E.g. RS-SC-304-0001
- **Identified year**
 - Enter reporting year.
- **Solution**
 - Enter solution. e.g. Critical Response Facilities - Emergency Power.
- **Description**
 - Enter description of solution. e.g. Evaluate the existing generators or feasibility of installing temporary or permanent generators at Critical Response Facilities.
- **Critical Asset Type**
 - Enter Critical Asset Type from drop down menu. e.g. Energy generation and distribution systems.
- **Hazards Addressed**
 - Hazard categories include avalanche, coastal flooding, cold wave, drought, earthquake, hail, heatwave, hurricane, precipitation, ice storm, land storm, lightning, riverine flooding, sea level rise, strong wind, tornado, tsunami, volcanic activity, wildfire, winter weather, and other.
- **Expected Effectiveness**
 - Enter Expected Effectiveness from drop down menu. Example: Effective.
- **Notes on Expected Effectiveness**
 - Enter relevant notes on Expected Effectiveness. e.g. This solution will add **resiliency to identified** critical facilities in the event of a loss of power to allow proper site response.
- **Feasibility**
 - Enter Feasibility from drop down menu. e.g. Moderate.
- **Community Impact**
 - Enter Community Impact. e.g. anticipated as entirely on-site solution.
- **Environmental Impact**

- Describe Environmental Impact of solution. e.g. Environmental impacts from spills or releases.
- **Recommended approach**
 - Enter Recommended Approach from drop down menu. e.g. Implement: Within 1-3 years
- **Priority Rank**
 - Enter Priority Rank from drop down menu. e.g. High.

11.10 SITE-LEVEL POLICY TRACKER

The Site-Level Policy Tracker category is intended to track policies, procedures, and programs implemented at the site level. Each data section has a policy tracker containing different policies and procedures. A Site-Level Policy Tracker category is available to view under the Facilities, Vehicles & Equipment, Travel & Commute, Waste, Evaluations, Measures, Funding & Training, Electronic Stewardship & Data Centers, and Resilience tabs. Below is a sample of how the Site-Level Policy Tracker will appear. The image below is an example from the Waste category.

| Site-Level Policies | | | | | |
|-------------------------------------|--|-------------------------------------|--------------------------------|---------------------------------------|---------------------|
| Last updated date: 11/14/2018 | | | | | |
| | Goal Policy, Procedure, or Program | In Place | Last Site-Level Update (MM/YY) | Additional Information | Upload/Web Location |
| <input type="button" value="Edit"/> | Program: Reduce and minimize hazardous chemicals and materials | <input checked="" type="checkbox"/> | 05/14 | | Download |
| <input type="button" value="Edit"/> | Policy: Integrated pest management and landscape management | <input type="checkbox"/> | Never | No formal policy in place | |
| <input type="button" value="Edit"/> | Policy: Increase use of acceptable alternative chemicals and processes | <input type="checkbox"/> | Never | No formal policy in place | |
| <input type="button" value="Edit"/> | Policy: Report per Sections (301-313) of EPCRA of 1986 | <input checked="" type="checkbox"/> | 04/15 | | Download |
| <input type="button" value="Edit"/> | Program: Composting | <input checked="" type="checkbox"/> | 7/1/2018 | Program in place | |
| <input type="button" value="Edit"/> | Program: Waste Reduction | <input type="checkbox"/> | 12/17 | Part of Sustainability Strategic Plan | Download |

Use the “Edit” button, highlighted above, to update the policy, procedure, or program information for the given category. The “Edit” button unlocks the columns allowing you to update information about any policies or programs that are in place at the site. When you are finished, use the “Update” button to save changes.

| | Goal Policy, Procedure, or Program | In Place | Last Site-Level Update (MM/YY) | Additional Information | Upload/Web Location |
|---|--|-------------------------------------|--------------------------------|------------------------|---|
| <input type="button" value="Update"/> <input type="button" value="Cancel"/> | Program: Reduce and minimize hazardous chemicals and materials | <input checked="" type="checkbox"/> | 05/14 | | <input type="button" value="Choose File"/> No file chosen |