

DOCKETED

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Portfolio Manager - What data is required?

In order for Portfolio Manager to calculate metrics about your property, you must provide several key pieces of information about your property's operation, in addition to your energy, water or waste data. The information required varies by the type of property and whether or not your property is eligible for an ENERGY STAR Score.

Data Required for All Properties

Property Name COVENANT LIVING OF TURLOCK

Property Address 2125 N Olive Ave

Total Gross Floor Area of Property 244,590 sq ft/sq M

Irrigated Area 2 sq ft/sq M/
Acres

Year Built/Planned for Construction Completion 1977

Occupancy 88.85 %

Number of Buildings 12

Helpful Hints for All Properties

- Definitions for Property Use Details are available in the Portfolio Manager Glossary (in the Help section, or <https://portfoliomanager.energystar.gov/pm/glossary>).
- Some properties may contain multiple Property Uses within a single building (e.g. office, data center, and parking; OR K-12 School and Swimming Pool). In most cases, EPA recommends you enter as few Property Uses as possible. More information about when to enter a separate Property Use is in this FAQ.
- For properties with multiple tenants within the same property use (e.g. Office), these tenants should be entered separately only when the number of Weekly Operating Hours differs by more than 10 hours. For example, say an Office Building has a Gross Floor Area of 100,000 square foot (SF) where 75,000 SF operates 60 hours a week and 25,000 SF operates 80 hours a week. Enter these as two separate Property Uses (one 75,000 SF property and one 25,000 SF property).

Senior Living Community Uses

Data Collected for Senior Living Community Uses

The following information is required to get an ENERGY STAR Score (if eligible):

Gross Floor Area	244,590 244,590
Maximum Resident Capacity	303 281
Average Number of Residents	335
Total Number of Residential Living Units	200
Number of Workers on Main Shift	130
Number of Computers	71
Number of Residential Washing Machines	146
Number of Commercial Washing Machines	4
Number of Residential Electronic Lift Systems	2
Number of Commercial Refrigeration/Freezer Units	11
Percent That Can Be Heated	100
Percent That Can Be Cooled	100

The following information is optional and not used to calculate a score; it may inform future analysis and score revisions by EPA and/or may help you manage and compare your properties:

Licensed Bed Capacity

52

Definition for Senior Living Community

Senior Living Community refers to buildings that house and provide care and assistance for elderly residents, specifically homes (skilled nursing facilities) and assisted living facilities. It is **NOT** intended for retirement or other senior communities that offer only independent living – a community with only independent living should benchmark as a Multifamily property (see below for further details).

Gross Floor Area should include all fully-enclosed space within the exterior walls of the building(s) including individual rooms or units, wellness centers, exam rooms, community rooms, small shops or service areas for residents and visitors (e.g. hair salons, convenience stores), staff offices, lobbies, atriums, cafeterias, kitchens, storage areas, hallways, basements, stairways, corridors between buildings, and elevator shafts. Open air stairwells, breezeways, and other similar areas that are not fully-enclosed should not be included in the gross floor area.

It is common for Senior Living Communities to include a mix of different living options, including both independent living, assisted living, and/or skilled nursing. In these situations, benchmarking guidance depends on the percent of living units designated as skilled nursing/assisted living:

- If more than 50% of the units in a community are skilled nursing and/or assisted living, the entire property should be benchmarked as a Senior Living Community. You can use one property use to characterize all activities at the community, including any independent living that may be present.
- If 50% or more of the units are independent living, the property should be benchmarked using both the Senior Living Community and Multifamily property uses. In this situation, the floor area of hallways and units for assisted living and any community areas specifically used to assist residents (e.g. nursing stations, exam rooms, physical therapy rooms, etc.) should be benchmarked with the Senior Living Community property use. The floor area of hallways and units for independent living along with any open common areas that are used by residents of both the independent and the nursing/assisted living units (e.g. game rooms or restaurants) should be benchmarked with the Multifamily property use.

Helpful Hints for Senior Living Community

- The Average Number of Residents is the time-weighted average for the community over the past 12 months.
- The Number of Workers on Main Shift should be entered as the number of workers present on a site at the same time, not the total number of workers added up across all shifts during a day.
- If you have a qualifying senior living community made up of multiple buildings on a campus, you can benchmark it as a single entity by aggregating the floor area. You do not need to enter separate properties in Portfolio Manager for each individual building.
- Energy and water for all buildings in a senior living community should be included. It can be entered in aggregate or as individual meters. bsp;

Meter Information

12 months - TID
12 months Tiger - gas

What's required to see metrics:

- 12 consecutive, complete months of bills if your energy or water is metered continuously.
- At least one delivery if your energy is delivered in bulk quantities (e.g. filling a propane tank.)

Please copy this sheet as needed to account for all meters at your property.

Basic Meter Information	
Meter Name or ID	
Meter Type (e.g. Electricity)	
Units (e.g. kWh)	
Date Meter Became Active	
Date Meter Became Inactive	

You can use the form below to get ready to enter your data so you can see metrics, however you can create your property and set up your meters without entering your meter data. You can add bills later.

Meter Bills			
Start Date/Delivery Date	End Date (leave blank for deliveries)	Usage/Quantity	Cost (optional)

