

HPD/HDC Qualified Benchmarking Provider Guidance

Transfer of Existing Property IDs

For guidance on matters not referenced in this document, contact benchmarking@hpd.nyc.gov.

Transfer of Existing Property IDs

Over the course of a Property's regulatory period with HPD/HDC, an Owner may opt to enter into a new contract with a different HPD/HDC pre-qualified Provider than the Provider that originally set up the Property's account in Portfolio Manager.

A. Owners Switching Providers

In the past, when an Owner opted to switch providers, the new provider may have opted to create a new Property account in Portfolio Manager (with a new Property ID). Going forward, when an Owner opts to switch Providers, the new Provider should avoid creating a new Property ID when there is an existing Property ID present. HPD/HDC would like there to be only one Property ID for each Property so that we can view one stream of data per Property for the duration of the benchmarking period.

- i. To ensure there are no duplicate Property IDs for the same Property, after entering into a contract with Owner, Providers should always consult Owners to verify that there is no prior account for the Property already in Portfolio manager.
- ii. If an Owner informs the new Provider that there was a prior account for the Property, the new Provider should complete Section B, Question 2 of the Form, which indicates the name of the prior Provider.
- iii. Once a Provider is made aware that their contract with an Owner is ending, the Provider should inform HPD at the end of the contract if there has not been a contract renewal. All notifications should be sent to benchmarking@hpd.nyc.gov.
- iv. When an owner opts to switch Providers, and the new Provider receives the Form with a Property for which there is an existing Property ID, the new Provider should contact the prior Provider and make all reasonable efforts to initiate transfer of the Property ID.

B. Account Transfers

- i. When an account transfer takes place, the new Provider should not create a new "Property ID" in Portfolio Manager. The Provider should utilize the existing Property ID, and submit all new data to this Property ID.
- ii. When an account transfer takes place, the new Provider should not enter the "Date of completion" of the original account setup with the prior Provider in Sections C, Questions 2 and 3 of the Form. The new Provider should enter "Date of completion" of the current account transfer.
- iii. When an account transfer takes place, the new Provider should over-ride the designated name of the prior Provider listed in the "Service and Product Provider" field of Portfolio Manager. The new Provider should replace the prior entry by data-entering the new Provider's designated name.

- iii. If a new Provider has made all reasonable efforts to transfer an existing Property ID, but is unable to do so, the Provider should inform HPD that they were unable transfer the Property ID, and they will be creating a new Property ID for a Property that is already in Portfolio Manager, by contacting benchmarking@hpd.nyc.gov.

C. Account Transfer Timing

- i. Since transferring accounts from one Provider to another may take up to several weeks, HPD/HDC is now requiring that Section A of the Form be pre-populated by HPD Project Managers and sent to Providers sooner in the process. This will ensure the Providers have sufficient to time to transfer accounts, when necessary.