



ENERGY STAR®

# SDG&E® Benchmarking Data Request Portal User Guide

*For submitting aggregated and nonaggregated energy data requests to SDG&E for compliance with state and local benchmarking regulations*

March 2020



Prepared by the Center for Sustainable Energy for the City of San Diego.

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# INTRODUCTION

## Portfolio Manager Overview

This guide will show you how to use the San Diego Gas & Electric Benchmarking Data Request Portal (BDRP). Building owners and operators, as well as designated third parties, can use this guide to sync their building's meters in ENERGY STAR® Portfolio Manager® to SDG&E's system.

### SDG&E CONSENT TO SHARE – LETTER OF AUTHORIZATION INFORMATION

SDG&E is committed to safeguarding customer information. Except in limited circumstances, we will not share account or energy usage data with third parties unless authorized us to do so. Letters of Authorization (LOA) enable SDG&E to track the type of information shared with third parties and for how long.

If you are requesting data for an account you do not own (for example, you are an energy consultant preparing a benchmarking submission for a client), SDG&E will require you to submit a LOA, in addition to the steps outlined in this guide.

Requestors have the option to register for SDG&E's Consent to Share site that provides you with self-service options such as creating new LOAs, copying existing LOAs, making corrections when a LOA is incorrect and revoking access to data when you no longer want to share it. Without registration, inaccurate LOAs may be invalidated and a new LOA will be required. It is recommended to register for Consent to Share prior to submitting your Benchmarking Request.

To access the Consent to Share Portal, visit [SDGE.com/Benchmarking](https://sdge.com/Benchmarking) and click on the Consent to Share link.

### Benchmarking

To help larger businesses stay on top of their energy usage needs and find ways to use less, the California Energy Commission created a statewide benchmarking program mandated by [Assembly Bill 802 \(AB 802\)](#), which was signed into law in 2015. The idea is simple: your energy use is measured and then you get an objective ranking of 1-100. Over time, this rating shows you how your efforts are paying off, and it also shows you how you're doing compared to other business in the area.

Owners of commercial, mixed-use, and multifamily buildings larger than 50,000 square feet must report benchmarking metrics publicly, on an annual basis using the ENERGY STAR Portfolio Manager system. Once you've created your building portfolio, you can use the methods below to send your building's energy use information to the ENERGY STAR portfolio manager.

AB 802 requires California utilities to provide aggregated whole-building energy usage information to building owners upon request. This is subject to certain thresholds set by the number of accounts in commercial and multi-family properties, in which permission from account holders may be required.

### Getting Started

Review our [Benchmarking Data Request Portal User Guide](#) before completing the steps listed below. The guide includes instructions for setting up an [ENERGY STAR® Portfolio Manager® account](#) using the [ENERGY STAR® Portfolio Manager® system](#) and instructions for requesting energy use through our [Benchmarking Data Request Portal](#).

Your Benchmarking Request may require Letters of Authorization (LOAs) for energy use data. SDG&E automates this process online at [Consent to Share](#). For details on data sharing requirements and registration, please visit the Consent to Share website before submitting your Benchmarking Request.

- 1 Set up an ENERGY STAR® Portfolio Manager® account if you don't already have one.
- 2 Start your Benchmarking request.  
Requests may be made by a customer and/or their authorized representative or a building owner and/or their authorized representative. You will receive a confirmation email with a link to check the status of your request. Contact us at [benchmarking@sdge.com](mailto:benchmarking@sdge.com) if you do not receive a confirmation email.
- 3 Check the status of your request. You will be notified via email when data have been uploaded into your Portfolio Manager account.

# Additional Resources

Need support? Check out the following resources to help you benchmark your building.

## ***San Diego Gas & Electric® Data Requests***

If you are interested in automating your data uploads into Portfolio Manager or need to request whole-building data, visit [sdge.com/benchmarking](https://sdge.com/benchmarking).

On the SDG&E website, you can access information on submitting authorization letters, as well as access the Benchmarking Data Request Portal and user guide.

Email [benchmarking@sdge.com](mailto:benchmarking@sdge.com) to troubleshoot any data request portal or authorization issues.

## ***City of San Diego Benchmarking Resources***

Visit [SanDiego.gov/benchmark](https://SanDiego.gov/benchmark) to access additional training resources.

- Building energy benchmarking fact sheet
- Step-by-step benchmarking training videos
- Frequently asked questions
- Upcoming benchmarking workshops

Email [energybenchmarking@sandiego.gov](mailto:energybenchmarking@sandiego.gov) with any specific City of San Diego benchmarking ordinance questions.

## ***City of Chula Vista Benchmarking Resources***

Visit [ChulaVista.gov/benchmark](https://ChulaVista.gov/benchmark) for additional resources, including:

- Step-by-step “How to Comply “document
- One-on-one appointments with City staff
- Compliance Checklist
- Frequently asked questions

Email [benchmark@chulavistaca.gov](mailto:benchmark@chulavistaca.gov) with any questions regarding the City’s Building Energy Saving Ordinance.

## ***California Energy Commission Benchmarking Resources***

Building owners can learn more about the state program and access resources such as webinars, frequently asked questions and more at [energy.ca.gov/benchmarking](https://energy.ca.gov/benchmarking).

Email [benchmarking@energy.ca.gov](mailto:benchmarking@energy.ca.gov) with any specific statewide benchmarking program questions.

# PREPARING TO SUBMIT YOUR REQUEST

## STEP 1: Setting up your Property in Portfolio Manager

Please refer to the [ENERGY STAR Portfolio Manager Reference Guide](#), hosted by the City of San Diego, if you have not already set up your property in Portfolio Manager. Properties must be set up in Portfolio Manager before proceeding.

## STEP 2: Connecting with SDG&E in Portfolio Manager

### ADD SDG&E AS A CONTACT

To request data through the BDRP, you first need to share your Portfolio Manager property with SDG&E in Portfolio Manager.

- A. **Add the “SDGE Benchmarking” account to your contacts in Portfolio Manager.**
  1. Once logged in to Portfolio Manager, click the **CONTACTS** link at the top right of the page.
  2. Then click the **ADD CONTACT** button.
  3. Using the name field, search **SDGE BENCHMARKING**.
  4. Click the **CONNECT** button, read and accept the terms and conditions, and submit the connection request. SDG&E will process your connection request within 5-10 minutes.

The screenshot shows a search results page in Portfolio Manager. On the left, there is a 'Your Search Criteria' box with input fields for Name (filled with 'SDGE Benchmarking'), Organization, Username, and Email Address, and a 'Search' button. Below this is a 'Tip' icon and text: 'Can't find what you are looking for? Try adjusting your search criteria.' On the right, a search result is displayed for 'SDGE Benchmarking' with the subtext 'SDGE Benchmarking Web Service with SDGE'. A blue 'Connect' button is highlighted with a red box. Below the result is a pagination bar showing 'Page 1 of 1' and a dropdown menu set to '50'.

**B. If you have existing meters, edit your account meter names to match the 8-digit SDG&E meter numbers.**

*If you have created your property, but not your energy meters, SDG&E's BDRP will create the appropriate meters for you in your Portfolio Manager property.*

1. Click a property in Portfolio Manager.
2. Navigate to the **METERS** tab.
3. Next to the meter you are changing, click the drop-down menu and select **EDIT BASIC METER INFORMATION**.
4. In the **NAME** field, enter ONLY the 8-digit meter number beginning with 0.
5. Click **SAVE CHANGES**.

Manage Bills (Meter Entries) for [Test Property 1](#)

Meter Selection: 01234567 - 63127823

**Basic Meter Information** (\*\*click on the arrow to the left to expand this section)

Name:	* 01234567	<a href="#">X Delete Meter</a>
Meter ID:	63127823	
Type:	Electric - Grid <a href="#">Need to change?</a>	
Units:	* kWh (thousand Watt-hours)	
Date Meter became Active:	* 01/01/2018 	
	<input checked="" type="checkbox"/> Still In Use	
Date Meter became Inactive:	<input type="text"/> 	
Custom Meter IDs	None	<a href="#">+ Add Another Custom Meter ID</a>

**Save Changes**



5. Select permissions for SDG&E by clicking the **EXCHANGE DATA** radio button.

### Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

#### Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

**NEW Who gets to Share Forward?**

- Full Access** - Automatically includes "Share Forward" rights
- Read Only** - Automatically does NOT include "Share Forward" rights
- Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
- Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Sort by:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ <a href="#">Test Property 1 (6016668)</a>	<input type="radio"/>				
<a href="#">SDGE Benchmarking</a>	<input type="radio"/>				

[Cancel](#)

6. A new window will pop up. Fill in all required fields and change the permissions as follows.

- i. Property Information **FULL ACCESS**
- ii. Goals, Improvements and Checklists **NONE**
- iii. Recognition **NONE**

Under **ADDITIONAL OPTIONS**, you will see the option **SHARE FORWARD**. Select the **NO** radio button

7. Scroll to the bottom of the pop-up and click **APPLY SELECTIONS AND AUTHORIZE EXCHANGE**.

Select Access Permissions to [Test Property 1](#) for [SDGE Benchmarking](#).  
The following information is required by [SDGE Benchmarking](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Select the permission level below that you would like to grant [SDGE Benchmarking](#) for each category.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ All Meter Information			
Goals, Improvements, & Checklists	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recognition	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Additional Options:**

Item	Yes	No
* <b>Share Forward</b> Allow SDGE Benchmarking to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

**Apply Selections & Authorize Exchange** [Cancel](#)

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8. Click **SHARE PROPERTIES**.

MyPortfolio **Sharing** Reporting Recognition

### Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

**4** Select Permissions for Each Contact  
The access levels you select do not have to be the same for each property or each person.

Sort by:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Test Property_1 (6016668)	<input type="radio"/>				
SDGE Benchmarking	<input type="radio"/> Edit				

**Share Property(ies)** Cancel

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9. You should receive a message in a green box saying, “You have successfully shared/edited access to your property(ies).”

MyPortfolio **Sharing** Reporting Recognition

You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

If you edited web services Custom ID fields, [read this](#).

**My Shared Properties (9)**

- Share (or Edit Access to) a Property
- Set Up Web Services/ Data Exchange
- Download Sharing Report

**Sharing Notifications (1)**

Test Property_1 - Sharing request sent to <a href="#">SDGE Benchmarking</a>	Cancel
	Clear

# BENCHMARKING DATA REQUEST PORTAL

Visit [sdge.com/benchmarking](https://sdge.com/benchmarking) and click the link under Step 2: Start Your Benchmarking Request.

## Benchmarking

To help larger businesses stay on top of their energy usage needs and find ways to use less, the California Energy Commission created a statewide benchmarking program mandated by [Assembly Bill 802 \(AB 802\)](#), which was signed into law in 2015. The idea is simple: your energy use is measured and then you get an objective ranking of 1 - 100. Over time, this rating shows you how your efforts are paying off, and it also shows you how you're doing compared to other business in the area.

Owners of commercial, mixed-use, and multifamily buildings larger than 50,000 square feet must report benchmarking metrics publicly, on an annual basis, using the ENERGY STAR Portfolio Manager system. Once you've created your building portfolio, you can use the methods below to send your building's energy use information to the ENERGY STAR portfolio manager.

AB 802 requires California utilities to provide aggregated whole-building energy usage information to building owners upon request. This is subject to certain thresholds set by the number of accounts in commercial and multi-family properties, in which permission from account holders may be required.

## Getting Started

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- 1 Set up an [ENERGY STAR® Portfolio Manager® account](#) if you don't already have one.
- 2 [Start your Benchmarking request.](#)  
Requests may be made by a customer and/or their authorized representative or a building owner and/or their authorized representative. You will receive a confirmation email with a link to check the status of your request. Contact us at [benchmarking@sdge.com](mailto:benchmarking@sdge.com) if you do not receive a confirmation email.
- 3 [Check the status of your request.](#) You will be notified via email when data have been uploaded into your Portfolio Manager account.

Please remember that if you fall under aggregation thresholds, or if you're a third-party requesting information on behalf of a client, your Benchmarking Request may require Letters of Authorization (LOAs) for energy use data. SDG&E automates this process online at [Consent to Share](#). For details on data sharing requirements and registration, please visit the [Consent to Share](#) website before submitting your Benchmarking Request.

# STEP 1: Getting Started

In this first step, indicate who is completing the request. Click **NEXT** to proceed.

*Please note that if you are not the building owner, the building owner's agent or the SDG&E account holder (or an employee for the company who is the building owner, building owner's agent or the SDG&E account holder), your benchmarking request may require a Letter of Authorization. This typically applies to third-party consultants submitting benchmarking requests on behalf of clients.*

The screenshot shows a web interface for the SDG&E Benchmarking Data Request Portal. On the left is a vertical navigation menu with six steps: Step 1 (Getting Started), Step 2 (Requestor Information), Step 3 (Building Information), Step 4 (Customer Authorization), Step 5 (Review and Submit), and Step 6 (Confirmation). Step 1 is highlighted with a blue arrow. The main content area has a heading 'Welcome to SDG&E's Benchmarking Data Request Portal' and a sub-heading 'Please follow the steps to complete and submit your request. You will need the following information to continue:'. Below this is a required field for 'ENERGY STAR Portfolio Manager Username' with a link to a user guide. A 'Let's get started...' label is followed by a horizontal line. Below the line is a red warning icon and the text 'Indicate who is completing this application:'. There are four radio button options: 'I am the building owner', 'I am the building owner's agent', 'I am the SDG&E account holder', and 'Other (please enter name & title below)'. A red warning icon is also present to the right of the options. At the bottom right is a blue 'Next >>' button with a red warning icon to its left.

## STEP 2: Requestor Information

1. Enter your information under “Requestor Details.”
2. Enter your organization’s address under “Requestor Business Address.”
  - a. The system uses a search function to bring up your address. If you are having difficulty finding your address, try using a common abbreviation and not using any periods. For example, instead of entering “123 MAIN STREET” enter “123 MAIN ST” without the period.
3. Enter your mailing address (if different from your business address).
4. Enter your organization name (optional).
5. Click **NEXT**.

**Step 1:**  
Getting Started

**Step 2:**  
Requestor Information

**Step 3:**  
Building Information

**Step 4:**  
Customer Authorization

**Step 5:**  
Review and Submit

**Step 6:**  
Confirmation

### Requestor Information

*Note: Property addresses included in your Benchmarking Data Request will be displayed on Step 3 - Building Information.*

**Requestor Details**

First Name:

Last Name:

Primary Phone:

Alt Phone:

Fax:

Email:

**Requestor Business Address**

Street:  ✓

Unit:

ZIP / Postal Code:

City:

State:

**Mailing Address**

Is the mailing address the same as the Requestor Business Address?  Yes  No

**Additional Information**

Organization:

<< Back **Next >>**

## STEP 3: Building Information

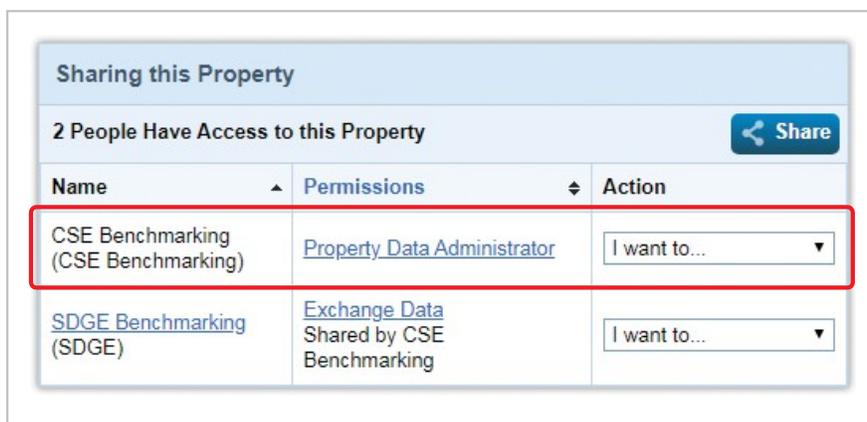
### STEP 3A: Setting Up Data Request Parameters

1. Enter the Portfolio Manager Username.

This should be the username under which the property was created, also known as the **Property Data Administrator**.

Not sure who the Property Data Administrator is for your property?

- a. Log in to Portfolio Manager and click on the Property Name.
- b. Under the “Summary” tab, scroll down to the box on the right-hand side that says “Sharing this property.”
- c. You will see the person’s name next to Property Data Administrator. The property data administrator username is in parentheses. This is the username that you use in the Benchmarking Data Request Portal.



2. Select the Request Type

There are two types of utility data requests. Refer to “Request Types” for more information.

3. Select Frequency.

- a. **Recurring** – Uploads will continue on a monthly basis until canceled.
- b. **One-Time** – There will be a one-time upload of the requested data.

4. Select Delivery Method.

- a. Portfolio Manager – SDG&E’s system will upload data directly to your property in Portfolio Manager.
- b. Download – An Excel spreadsheet of your data will be generated.

5. To read the “Terms and Conditions,” click the “Terms and Conditions” link (required to proceed).

6. Check the box to affirm you have read and agree to the terms and conditions.

7. Click **RETRIEVE PROPERTIES**.

- a. Property retrieval times vary according to number of properties in Portfolio Manager under a given username. Do not proceed with any of the next steps until all properties have loaded.

**Step 1:** Getting Started  
**Step 2:** Requestor Information  
**Step 3:** Building Information  
**Step 4:** Customer Authorization  
**Step 5:** Review and Submit  
**Step 6:** Confirmation

To complete the Benchmarking Data Request for your properties, please provide your ENERGY STAR Portfolio Manager Username. If you don't have a user name, click [here](#) to register.

*Note: Property retrieval times ranging from 5 to 30 minutes may be experienced depending on the number of shared properties in Portfolio Manager. Please don't refresh your browser or click the back button. A 'spinner' will indicate that the retrieval is in progress.*

*Note: Click Terms & Conditions to enable checkbox and retrieval.*

Portfolio Manager Information:

Portfolio Manager Username: CSE Benchmarking

Request Type/Frequency: Aggregated Recurring

Delivery Method: Portfolio Manager

I have read and agree with the Terms and Conditions.

**Retrieve Shared Properties**

<< Back Next >>

**Step 1:** Getting Started  
**Step 2:** Requestor Information  
**Step 3:** Building Information  
**Step 4:** Customer Authorization  
**Step 5:** Review and Submit  
**Step 6:** Confirmation

To complete the Benchmarking Data Request for your properties, please provide your ENERGY STAR Portfolio Manager Username. If you don't have a user name, click [here](#) to register.

*Note: Property retrieval times ranging from 5 to 30 minutes may be experienced depending on the number of shared properties in Portfolio Manager. Please don't refresh your browser or click the back button. A 'spinner' will indicate that the retrieval is in progress.*

*Note: Click Terms & Conditions to enable checkbox and retrieval.*

Portfolio Manager Information:

Portfolio Manager Username: CSE Benchmarking

Request Type/Frequency: Aggregated Recurring

Delivery Method: Portfolio Manager

I have read and agree with the Terms and Conditions.

**Retrieve Shared Properties**

**Retrieving Shared Properties from Portfolio Manager**

Finalizing Records...

<< Back Next >>

## DATA REQUESTS

### A. AGGREGATED DATAREQUESTS

**Aggregated data requests** provide whole-building data under virtual meters. In order to request whole-building data, you must be a building owner or acting on behalf of a building owner, and the following aggregation thresholds must be met.

- Three or more utility accounts of an energy type (building has no residential meters).
- Five or more utility accounts of an energy type (building has one or more residential meters).

If you have enough electric accounts, but only have one main gas meter, you can verify your gas meter for syncing by providing the **meter trio** to validate your access. The **meter trio** consists of the account number (10 digits), meter number (eight digits) and last bill amount (for the entire account).

If you fall under the thresholds listed above, you can still request aggregated data, but will need a signed Letter of Authorization from all account holders in the building. You can utilize **SDG&E's Consent to Share** platform (see following) to streamline this process.

Aggregated data requests provide monthly consumption data only (no demand or cost information) in therms or kilowatt-hours. This type of data request complies with local and statewide benchmarking requirements.

### B. NONAGGREGATED DATAREQUESTS

**Nonaggregated data requests** are also supported by SDG&E's Benchmarking Data Request Portal. These requests are for building owners and managers who own all of their meters in the building and would like to sync monthly consumption data on a meter-by-meter basis.

You can use nonaggregated data requests to comply with local and statewide benchmarking requirements, but it can also be utilized by any business wishing to benchmark their building in ENERGY STAR Portfolio Manager and sync their monthly consumption data from SDG&E. All meters requested in a nonaggregated data request must be validated using the **meter trio** (account number, meter number and last bill amount).

NOTE: You can only submit one type of request per submission through the Benchmarking Data Request Portal. If you need to submit a mixture of aggregated and nonaggregated requests, submit all aggregated requests in one batch and all nonaggregated requests in another batch.

## STEP 3B: Selecting Properties and Meters to Include in Request

1. By default, all properties will be selected, except for the following.
  - a. Unverified addresses
    - i. Note your property address in Portfolio Manager should match your primary service address exactly. For example, 123 Main Street would be 123 MAIN ST in SDG&E’s system. If there is a mismatch, you will manually have to associate the address.
    - ii. Refer to the “Verified Address” column to confirm if the property’s primary service address is verified. If it says “No,” you will either have to update your Portfolio Manager property address and restart the Benchmarking Data Request Portal application (recommended) or associate the correct address using the following steps.
  - b. Buildings not covered
    - i. Under Assembly Bill (AB) 802, building owners and owner agents can only request aggregated data if certain aggregation thresholds are met:
      - Three or more accounts of an energy type (no residential accounts)
      - Five or more accounts of an energy type (one or more residential accounts)
    - ii. If the system notes that the property is “Not a Covered Building” then you will need to restart the request and either:
      - Get letters of authorization from tenants to proceed with either an aggregated or nonaggregated request
      - Submit a nonaggregated request, which requires each meter be verified by the **meter trio** (account number, meter number and last bill amount)
2. Only select the properties for which you wish to make a new request or overwrite an existing request.
3. If your building/property has meters with multiple service addresses (which is common for multifamily properties), you will need to manually associate additional service addresses with the property.
  - a. By default, all service addresses tied to your main property address (e.g., 123 MAIN ST) are included (e.g., 123 MAIN ST Suite 1, 2, 3, 4, etc.).

To complete the Benchmarking Data Request for your properties, please provide your ENERGY STAR Portfolio Manager Username. If you don't have a user name, click [here](#) to register.

*Note: Property retrieval times ranging from 5 to 30 minutes may be experienced depending on the number of shared properties in Portfolio Manager. Please don't refresh your browser or click the back button. A 'spinner' will indicate that the retrieval is in progress.*

*Note: Click Terms & Conditions to enable checkbox and retrieval.*

Portfolio Manager Information:

Portfolio Manager Username: CSE Benchmarking

Request Type/Frequency: Aggregated Recurring

Delivery Method: Portfolio Manager

I have read and agree with the Terms and Conditions.

[Retrieve Shared Properties](#)

Using the Energy Star Portfolio Manager account information provided, the following building profiles and associated meters were retrieved. Please review the information listed below and select the buildings and meters that you would like to include on your benchmarking request.

<input type="checkbox"/>	Property Name	Portfolio Manager Property ID	Address	Request Type	Verified Address?	Meters
<input checked="" type="checkbox"/>	Test Office Property	9132173	Sherman St San Diego, CA 92110-4313 US	Aggregated	Yes	3/3

- b. Whether you are doing an aggregated or nonaggregated request, you must ensure all service addresses are associated with the property or the system will not pull all meeting information for your building.



## Service Addresses for Multifamily Properties

If you have a multifamily property, please be sure that all service addresses are added for your property, otherwise you will receive incomplete data. This can be achieved one of two ways:

1. Create a campus with individual buildings for every different service address on your property.
  - This will ensure the SDG&E system brings in all the service addresses associated with your property. You won't need to manually add service addresses in SDG&E's system but will need to create multiple properties in Portfolio Manager with appropriate square footages and use details.
2. Create a single property in Portfolio Manager to represent the total square footage of your multifamily property.
  - This requires you to manually add every service address and verify every meter using the process in Step 3. If you do not manually add all service addresses to the SDG&E system, the data provided by SDG&E will be incomplete.

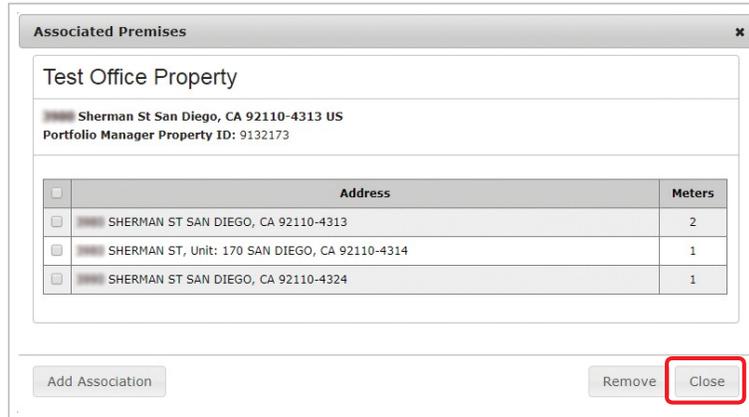
- c. Click the link under the "Address" column to see a dialog box of the service addresses associated with that property.
  - i. You can deselect any addresses not tied to your property, if needed, by selecting the row by the address you wish to remove and clicking "Remove."

	Address	Meters
<input type="checkbox"/>	SHERMAN ST SAN DIEGO, CA 92110-4313	2
<input type="checkbox"/>	SHERMAN ST, Unit: 170 SAN DIEGO, CA 92110-4314	1

- ii. If you do not see your service addresses listed, you will have to add each one individually.
  1. Click **ADD ASSOCIATION**.
  2. Search for the service address. Remember to use abbreviations like ST, AVE, HWY and be sure to include the ZIP code. If you have trouble finding the service address, only enter the street number and ZIP and the street address should populate.
  3. Click **SEARCH** to find the correct address. Check the box next to the service address you wish to associate with the property and click **ADD**.
  4. Repeat this process for all additional service addresses at the property.

	Address
<input type="checkbox"/>	SHERMAN ST SAN DIEGO, CA 92110-4324

- d. When complete, click **CLOSE**. Repeat this Step for all properties being requested.



- e. You can also click the building icon to confirm all addresses associated with that property in previous requests.
- Once you have associated all service addresses with the property, you can review the meter selections for that property.
    - Click on the link under “Property Name.”
    - In the dialog box, review all meters, service addresses and account numbers.
      - Deselect any meters that should not be associated in your request.
        - Some meters are listed but can’t be selected. These are SDG&E meters and should be ignored (see first entry in image below).
        - Be sure to confirm all meter numbers at your property are included. If they are not included, the data for missing meters will not be reported with your request, possibly causing an underreporting of energy usage for your property.
        - For nonaggregated requests, confirm the **Benchmarking Period** (upper right-hand corner) is correct. For nonaggregated requests, you can adjust this period as needed.

i
Note

If you have two properties with the same service address in a request (uncommon), the system may automatically cancel the request. Be sure to request two separate properties with the same service address in separate Benchmarking Data Request Portal request enrollments.



- c. For **nonaggregated** requests, be sure to update the time period for your request.
    - i. In the upper-right hand corner, you can change the start date of your request to an earlier date
    - ii. For compliance with state and local benchmarking requirements, be sure you select January 1 of the year for which you are required to report data, or an earlier date (not later) or else the data you submit will be incomplete for that reporting year.
  - d. Once complete, click **GO TO PROPERTY LIST** and repeat this step for all properties being requested.
5. Once you have completed adding service addresses and verifying meter selections for all properties, click **NEXT** in the bottom right-hand corner of the screen.

Using the Energy Star Portfolio Manager account information provided, the following building profiles and associated meters were retrieved. Please review the information listed below and select the buildings and meters that you would like to include on your benchmarking request.

<input type="checkbox"/>	Property Name ⓘ	Portfolio Manager Property ID	Address ⓘ	Request Type	Verified Address?	Meters ⓘ
<input checked="" type="checkbox"/>	Test Office Property +	9132173	Sherman St San Diego, CA 92110-4313 US	Aggregated	Yes	3/3

All Shared Properties Retrieved

<< Back
Next >>

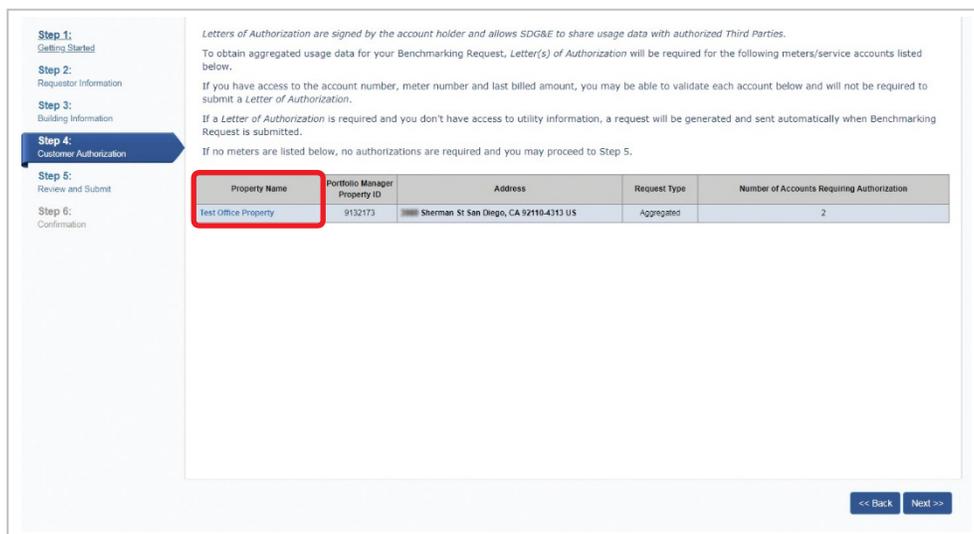
# STEP 4: Customer Authorization

All nonaggregated requests and some aggregated requests with energy meters that fall under the aggregation threshold will need to verify individual meter account information using the meter trio (account number, meter number and last bill amount).

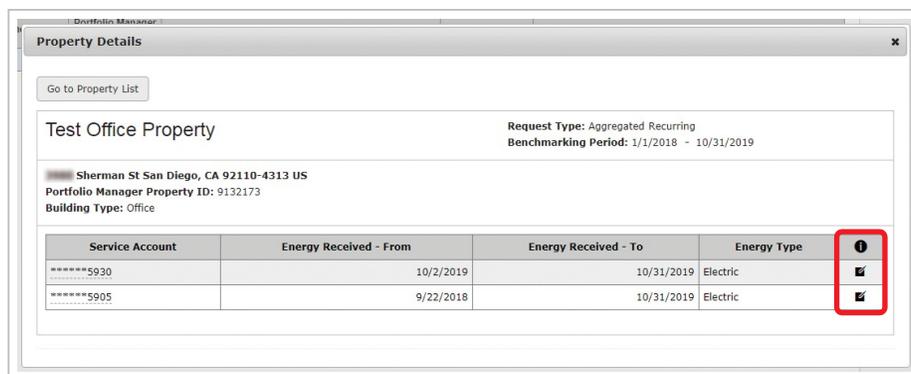
- Only aggregated requests where one or more types of meters fall under the aggregation threshold (e.g., there is only one gas meter for the property) will need to be validated. In Portfolio Manager, you will see two meters added: Total Electric and Total Gas, which will be aggregated consumption for all the service addresses and meters you provided in Step 3.

Do the following to verify individual meters.

1. Click on the Property Name.



2. Click on the icon in the far-right column (pencil and checkbox) for each meter. A pop-up box will generate where you can enter the meter trio data (account number, meter number and last bill amount).



A dialog box titled "Validate Account" with a close button (X) in the top right corner. It contains three input fields: "Account Number", "Meter Number", and "Last Amount Billed" (with a dollar sign icon). Each field has a red exclamation mark icon to its right, indicating a validation error. At the bottom right, there are "OK" and "Cancel" buttons.

If your information is valid, the checkbox will appear green and you can proceed to the next meter.

3. Click **GO TO PROPERTY LIST** in the upper left-hand corner to return to the authorization screen.

A "Property Details" screen showing information for "Test Office Property". The address is "Sherman St San Diego, CA 92110-4313 US". The "Request Type" is "Aggregated Recurring" and the "Benchmarking Period" is "1/1/2018 - 10/31/2019". The "Portfolio Manager Property ID" is "9132173" and the "Building Type" is "Office". A table lists energy received data for two service accounts. A "Go to Property List" button is highlighted with a red box in the top left. A red box highlights the information icon and a green checkmark in the table's rightmost column.

Service Account	Energy Received - From	Energy Received - To	Energy Type	
*****5930	10/2/2019	10/31/2019	Electric	<input type="checkbox"/>
*****5905	9/22/2018	10/31/2019	Electric	<input checked="" type="checkbox"/>

4. Repeat Steps 1-3 for each additional property (do not use the arrows as it may not save your data).
5. Click **NEXT** at the bottom right-hand corner of the screen when you are ready to proceed.

# STEP 5: Review and Submit

On this page, you can review your request prior to submission. Check for the following.

1. Only the properties you wish to submit a request for are listed. If you see additional properties, click back to return to Step 3 and deselect additional properties you do not want to submit.
2. Confirm the request type (aggregated or nonaggregated).
3. Confirm that the “Verified Address” column says “Yes.”
4. Confirm the number of meters selected out of the total meter count available.
5. Click **SUBMIT** once you have confirmed all details of the request

**Step 1:** Getting Started

**Step 2:** Requestor Information

**Step 3:** Building Information

**Step 4:** Customer Authorization

**Step 5:** Review and Submit

**Step 6:** Confirmation

Please take a moment to review your request before you submit it to ensure that the information you have provided is true and correct.

*Please Note: To stop receiving data (recurring requests), you can un-share a property or account with SDG&E through Portfolio Manager. To make any other changes or alter your existing request, please submit a new request and your original request will be overwritten.*

**Requestor Details**  
Applicant Name: John Doe  
Phone: (619) 555-1212  
Email: john.doe@google.com

**Requestor Business Address**  
Sherman St  
San Diego, CA 92110-4313

**Additional Information**  
Organization: Acme, Inc.  
Delivery Method: Portfolio Manager

**Building Information**

Property Name	Portfolio Manager Property ID	Address	Request Type	Verified Address?	Meters
Test Office Property	9132173	Sherman St San Diego, CA 92110-4313 US	Aggregated	Yes	3/3

<< Back **Submit**

# STEP 6: Confirmation

Your request number is: 11006559.

**Here's what you can expect:**

- Confirmation has been sent to your email address with a link to check the status of your request.
- If Letters of Authorization\* are required, SDG&E will proactively attempt to obtain customer authorization on requestors' behalf if the account holder mailing and/or email address is on file.
- You will be notified via email when data has been uploaded into your Portfolio Manager account.
- If you don't receive an email confirmation, please contact us at [benchmarking@semprautilities.com](mailto:benchmarking@semprautilities.com).

\*Letters of Authorization authorizes a third party to receive customer information or act on a customer's behalf.  
Authorizations usually involve billing calculations, PSM benchmarking, correspondence in connection with accounts, investigation of utility bills, rate analysis and changes, etc.



Application-12006...pdf Show all X

Please wait a few moments on the screen for a PDF to download containing your request information. Be sure to adjust security settings as needed to allow the download.



## AB802 Benchmarking

Enrollment Number: 1100 Application Date: 12/8/2019

### Requestor Information

Requestor Business Address: Sherman St San Diego CA 92110-4313 Mailing Address: Sherman St San Diego CA 92110-4313  
Delivery Method: Portfolio Manager

### Requestor Details

First Name: John Last Name: Doe  
Primary Phone: (619) 555-1212 Fax:  
Alternate Phone: Email: john.doe@google.com

### Additional Information

Organization: Acme, Inc.

### Building Information

Test Office Property Request Type Benchmarking Period  
Sherman St San Diego, CA 92110-4313 Aggregated | Recurring 01/01/2018 - 10/31/2019

Portfolio Manager Property ID: 9132173

Building Type: Office

Meter Number	Energy Type	Service Account	Postal Addresses Serviced?
794	Electric	*****5905	1
3945	Electric	*6660	1
797	Electric	*****5930	1

Service Account	Energy Received From	Energy Received To	Energy Type
*****5905	9/22/2018	10/31/2019	Electric
*****5930	10/2/2019	10/31/2019	Electric

If after five minutes a PDF download does not generate, it is likely that your request did not go through. Please proceed to the steps below under “**Checking the Status of Your Request**” to see if the request was successful. If it says your request was canceled, email the Benchmarking Request # and screenshot of the error to [benchmarking@sdge.com](mailto:benchmarking@sdge.com) for assistance in troubleshooting your request.

If the PDF does generate, please save it for your records. Your benchmarking data should be uploaded directly to Portfolio Manager within a week. If you chose Excel as your delivery method instead of Portfolio Manager, an Excel spreadsheet will be emailed to you with your data.

You will receive updates regarding your request from [benchmarking@sdge.com](mailto:benchmarking@sdge.com). See the following instructions to check the status of your request at any time. If additional authorizations are required, please contact [benchmarking@sdge.com](mailto:benchmarking@sdge.com) to submit any additional documentation needed.

# STEP 7: Checking the Status of Your Request

1. To check the status of you request, visit [sdge.com/benchmarking](https://sdge.com/benchmarking) and click the link under Step 3: Check the Status of Your Request.

### Benchmarking

To help larger businesses stay on top of their energy usage needs and find ways to use less, the California Energy Commission created a statewide benchmarking program mandated by [Assembly Bill 802 \(AB 802\)](#), which was signed into law in 2015. The idea is simple: your energy use is measured and then you get an objective ranking of 1 - 100. Over time, this rating shows you how your efforts are paying off, and it also shows you how you're doing compared to other business in the area.

Owners of commercial, mixed use, and multifamily buildings larger than 50,000 square feet must report benchmarking metrics publicly, on an annual basis, using the ENERGY STAR Portfolio Manager system. Once you've created your building portfolio, you can use the methods below to send your building's energy use information to the ENERGY STAR portfolio manager.

AB 802 requires California utilities to provide aggregated whole-building energy usage information to building owners upon request. This is subject to certain thresholds set by the number of accounts in commercial and multi-family properties, in which permission from account holders may be required.

### Getting Started

Review our [Benchmarking Data Request Portal User Guide](#) before completing the steps listed below. The guide includes instructions for setting up an ENERGY STAR® Portfolio Manager® account using the [ENERGY STAR® Portfolio Manager® system](#) and instructions for requesting energy use through our [Benchmarking Data Request Portal](#).

Your Benchmarking Request may require Letters of Authorization (LOAs) for energy use data. SDG&E automates this process online at [Consent to Share](#). For details on data sharing requirements and registration, please visit the [Consent to Share](#) website before submitting your Benchmarking Request.

- 1 Set up an [ENERGY STAR® Portfolio Manager® account](#) if you don't already have one.
- 2 Start your [Benchmarking request](#). Requests may be made by a customer and/or their authorized representative or a building owner and/or their authorized representative. You will receive a confirmation email with a link to check the status of your request. Contact us at [benchmarking@sdge.com](mailto:benchmarking@sdge.com) if you do not receive a confirmation email.
- 3 **Check the status of your request:** you will be notified via email when data have been uploaded into your Portfolio Manager account.

2. Enter your Benchmarking Request Number and click **SEARCH**.

### Benchmarking Request Status Check

Thank you for submitting your request. You can use this form to check the status of your request at any time. Enter your **Benchmarking Request Number** to check your status.

3. Review the status of your request. If the request says it was canceled, please email [benchmarking@sdge.com](mailto:benchmarking@sdge.com) for assistance in troubleshooting your request.
4. Providing additional authorizations.
  - a. If meters still need to be validated using the meter trio (account number, meter number and last bill amount), follow the steps in **Step 4: Customer Authorization**.
5. You can also edit the delivery method of your request using the drop-down box. "Portfolio Manager" must be selected as the delivery method for data to be uploaded into your property in Portfolio Manager.
6. Click **SUBMIT** to process any changes.

[Back to Validation Screen](#)

**Benchmarking Request Number - 11006359**

**Status Message**  
Your request is in process. Please see status updates below for details.

**Building Information**  
Please review the status of the buildings listed below.

Property Name	Portfolio Manager Property ID	Address	Request Type	Verified Address?	Meters
<a href="#">Test Office Property</a>	9132173	████ Sherman St San Diego, CA 92110-4313	Aggregated	Yes	3/3

**Delivery Method:** ● Portfolio Manager ▼

Submit



Center for  
Sustainable  
Energy™

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**EnergyCenter.org**