ENERGY STAR®

PORTFOLIO MANAGER® REFERENCE GUIDE

For Compliance with the City of San Diego's Building Energy Benchmarking Ordinance

MAY 2019

The City of SAN DIEGO

Center for Sustainable Energy™

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

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This reference guide is adapted from U.S. EPA's ENERGY STAR® Portfolio Manager® training materials available online at portfoliomanager.energystar.gov.

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INTRODUCTION

Portolio Manager Overview

The ENERGY STAR® program was established by the Environmental Protection Agency (EPA) in 1992. ENERGY STAR helps identify and promote energy efficiency products and buildings. Through labeling and standards, it additionally helps reduce energy consumption, improve energy security and reduce pollution.

EPA's ENERGY STAR building measurement and tracking tool, Portfolio Manager®, is a free, online, secure resource for all types of properties. Some 40 percent of U.S. commercial building space is already entered into Portfolio Manager – making it the industry-leading tool for managing and reporting building performance. When you add your buildings, you will be joining more than half of the Fortune 100®, half of the nation's largest healthcare organizations, major league sports teams, colleges and universities and cities using Portfolio Manager.

Portfolio Manager is both a management tool and a metrics calculator. As a management tool, it can be used to evaluate whole-building energy and water consumption, assess waste and materials management, track changes over time, track green power purchases, share and report data with others, create reports or apply for ENERGY STAR certification.

As a metrics calculator, Portfolio Manager will help organize and inform your energy management strategy. Reports will easily generate energy and water consumption figures, waste and materials management figures, greenhouse gas emissions and your property's ENERGY STAR score. Any type of building can use the tool to generate an energy use intensity value – or energy use per square foot value annualized for the most recent 12 months of data input to the tool. By tracking your energy use, you can identify underperforming buildings, set investment priorities and track improvements. Other popular metrics include weather normalized energy consumption values, greenhouse gas emissions metrics and the ENERGY STAR 1-100 score.

It is important to note that ALL buildings can use Portfolio Manager – regardless of the type and no matter whether they can earn the 1-100 ENERGY STAR score. Even in the absence of a 1-100 score, you can compare your buildings to the national median, or to your own set of buildings, in order to set targets and goals. With limited resources and capital, you need to be strategic in focusing your resources in order to achieve the greatest benefits from energy efficiency projects.

Benchmarking can help you understand which of your buildings can deliver the largest savings and where you should focus your efforts as your energy management activities get underway. Benchmarking may also be required by your state or local jurisdiction

State and Local Benchmarking Requirements

State of California

California adopted Assembly Bill (AB) 802 in 2015 that requires owners and operators of all commercial, multifamily and mixed-use (commercial/residential) properties larger than 50,000 square feet (and for multifamily and mixed-used properties with more than 17 units) to benchmark and publicly disclose whole-building energy usage to the California Energy Commission. All properties must report on an annual basis to either the California Energy Commission or to their local jurisdiction, if that jurisdiction has a local approved benchmarking program in place. For San Diego County, as of May 1, 2019, the only local jurisdiction with an approved exemption is the City of San Diego.

For commercial and multifamily/mixed-use property owners outside of the City of San Diego, all reporting should be sent to the California Energy Commission by June 1 annually. Commercial reporting began in 2018 and multifamily/mixed-use reporting begins in 2019. Learn more at energy.ca.gov/benchmarking.

For commercial and multifamily/mixed-use property owners within the City of San Diego, please see below for more details about the local reporting program.

City of San Diego

The City of San Diego is promoting more energy-efficient buildings by requiring energy benchmarking. As part of its climate action plan, the city has adopted the Building Energy Benchmarking Ordinance (BEBO) covering large commercial, multifamily and mixed-use buildings.

Energy Data Access for Benchmarking

State Assembly Bill 802 includes provisions for building owners and operators to obtain whole-building energy usage information directly from utilities, providing certain aggregation thresholds are met. The data access provisions ensure building owners can access the data they need to properly benchmark their building's total energy consumption. The current aggregation thresholds are as follows.

- 3+ utility accounts of an energy type for buildings with only commercial accounts
- 5+ utility accounts of an energy type for buildings with one or more residential accounts

To request your data, visit your local utility's benchmarking page. In SDG&E territory, visit **sdge.com/benchmarking**.

Building owners within the City of San Diego should follow this reporting schedule.

June 1, 2019	Commercial properties report to the City of San Diego or file an exemption request Multifamily/mixed-use properties with 17+ residential accounts report to the state
March 1, 2020	Deadline to submit an exemption request for June 1, 2020, reporting
June 1, 2020	Commercial and multifamily/mixed-use properties report to the City of San Diego

More information on the City of San Diego's Building Energy Benchmarking Ordinance, including exemptions, additional training resources, frequently asked questions and reporting links, are at **sandiego.gov/benchmark**.

Please see **Reporting for State and Local Benchmarking Program Compliance** for more instructions on how to submit your energy benchmarking report.

Benchmarking Coach Program

Need Help Benchmarking Your Building?

No-cost benchmarking coach technical support is available to San Diego Regional Green Business Network Members at **greenbizsd.org/benchmarking**. Not a member? There is no cost to join. Sign up your business at **greenbizsd.org/join**.

Our **Benchmarking Coaches** help you

Create an account	Add properties and buildings	Create meters and add data
Set up automated benchmarking	Share your information	Generate reports on your property's data

Sign-up today to get started! Once your organization is a member of the San Diego Regional Green Business Network, email **benchmarking@greenbizsd.org** to submit your support request.

Benchmarking Coaching

- No-cost technical support for benchmarking in ENERGY STAR Portfolio Manager
- Exclusive member benefit for San Diego Regional Green Business Network members.

Did You Know?

The average commercial building wastes 30 percent of the energy it consumes. If you haven't done anything to save energy, chances are you'll find many opportunities to improve.

Buildings that consistently benchmark reduce energy use an average of 2.4 percent per year.

Testimonials

"The phone support worked great in answering all my questions."

"The Benchmarking Coach was terrific. She met with us several times, answered all our questions and helped us set up everything so we can now benchmark our buildings."

"The Benchmarking Coach knew what she was talking about. She gave me different report templates I could create to tailor my property and make any necessary changes."

"The Benchmarking Coach went above and beyond to help me out with benchmarking! She always followed up in an extremely timely manner and was both kind and professional on the phone!"

The Benchmarking Coach program is a project of the San Diego Regional Climate Collaborative, which is partially funded by California utility customers and administered by San Diego Gas & Electric Company (SDG&E®) under the auspices of the California Public Utilities Commission.

USING PORTFOLIO MANAGER

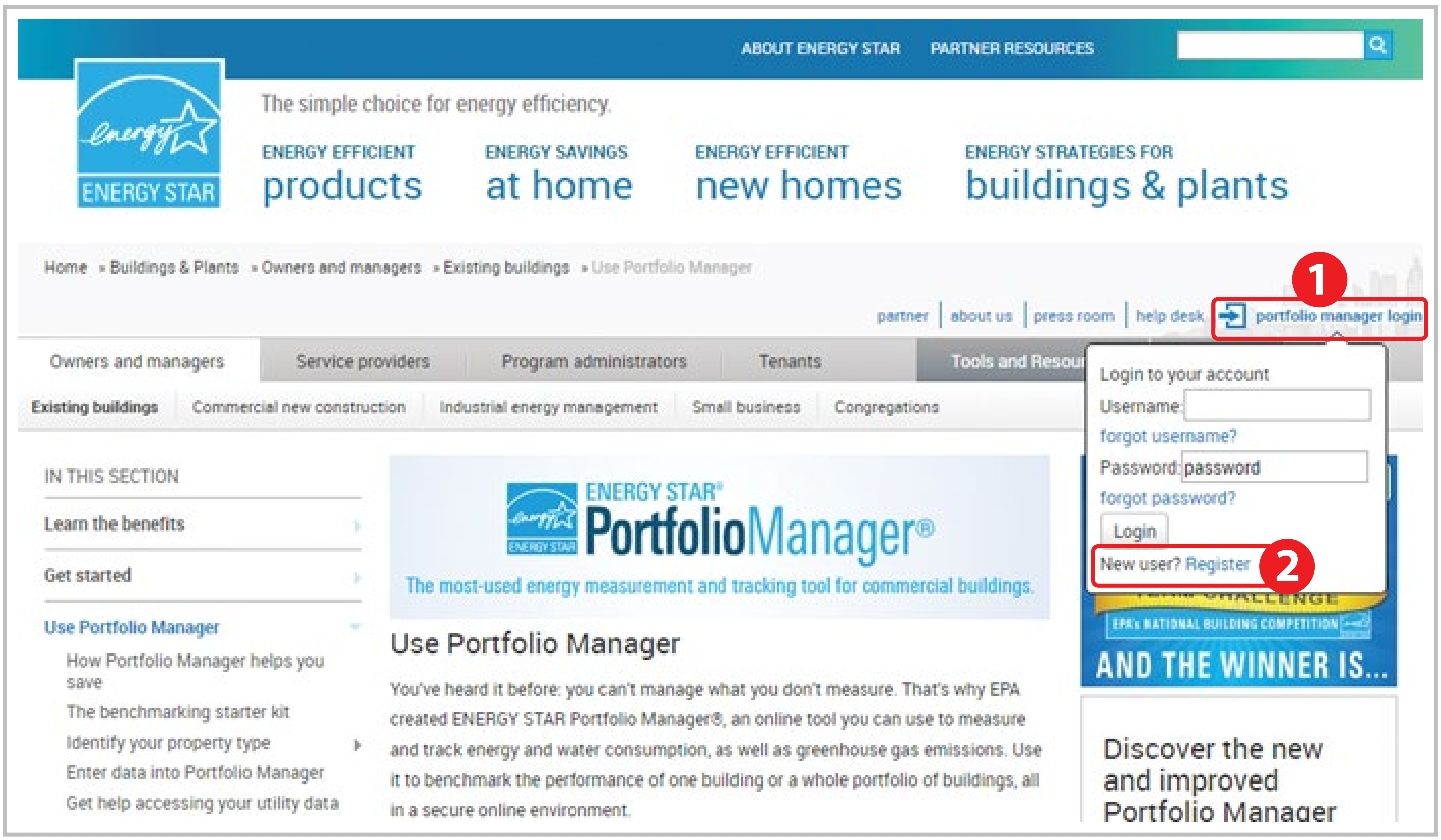
Key Steps

1. Creating a Portfolio Manager Account
2. Adding a Property
3. Entering Energy and Water Consumption Data
4. Reporting for State and Local Compliance

1) Creating a Portfolio Manager Account

Before you can get started using Portfolio Manager, you need to create an account. Follow these steps to begin.

1. Open your browser of choice and type in the URL: **portfoliomanager.energystar.gov**
2. Click **PORTFOLIO MANAGER LOGIN** ①.
   - At the bottom of the pop-up box, you will see a place to register as a new user. Click **REGISTER** ②.



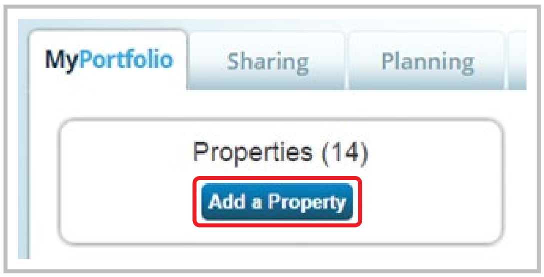
3. Enter the information requested in the form.
   - On the right-hand side, you will see exclamation points and informational notes to guide you as you enter information throughout Portfolio Manager.
4. Be sure to mark the following:
   - For "Reporting Units," be sure to leave the "Conventional EPA units" button selected.
   - If you do not know if your organization is an ENERGY STAR partner, leave the "No" button selected.
   - For "Searchability in Portfolio Manager," choose "Yes."

5. Once you have entered allt your information, click **CREATE MY ACCOUNT** to finish the process.
    - You will go to the **MYPORTFOLIO** tab and a congratulations message will appear in a green box at the top of the page.

2) Adding a Property

To get started, log in to Portfolio Manager at **portfoliomanager.energystar.gov**. Then, follow these instructions to create a property and to enter property information. If you have already added your properties to your Portfolio Manager account, proceed to the next step.

1. Click **ADD A PROPERTY** on the **MYPORTFOLIO** tab.



2. Select your property type. For additional information, please see **Property Types in Portfolio Manager**.
3. Choose the number of physical buildings on your property.
    - If your property consists of a single building, choose the button next to "One."
    - If you have multiple buildings as part of your property, choose the button next to "More than One" and enter your total number of buildings.
      For example, you might choose "More than One" if you have two physical buildings OR if you are a marina and want to break out your dock square footage and energy usage.
4. For "Your Property's Construction Status," choose "Existing."
5. Once you have entered all of this information for your property, click **GET STARTED**.

Helpful Data to Have On Hand

Prior to getting started adding a property, it is helpful to have the following information on hand.

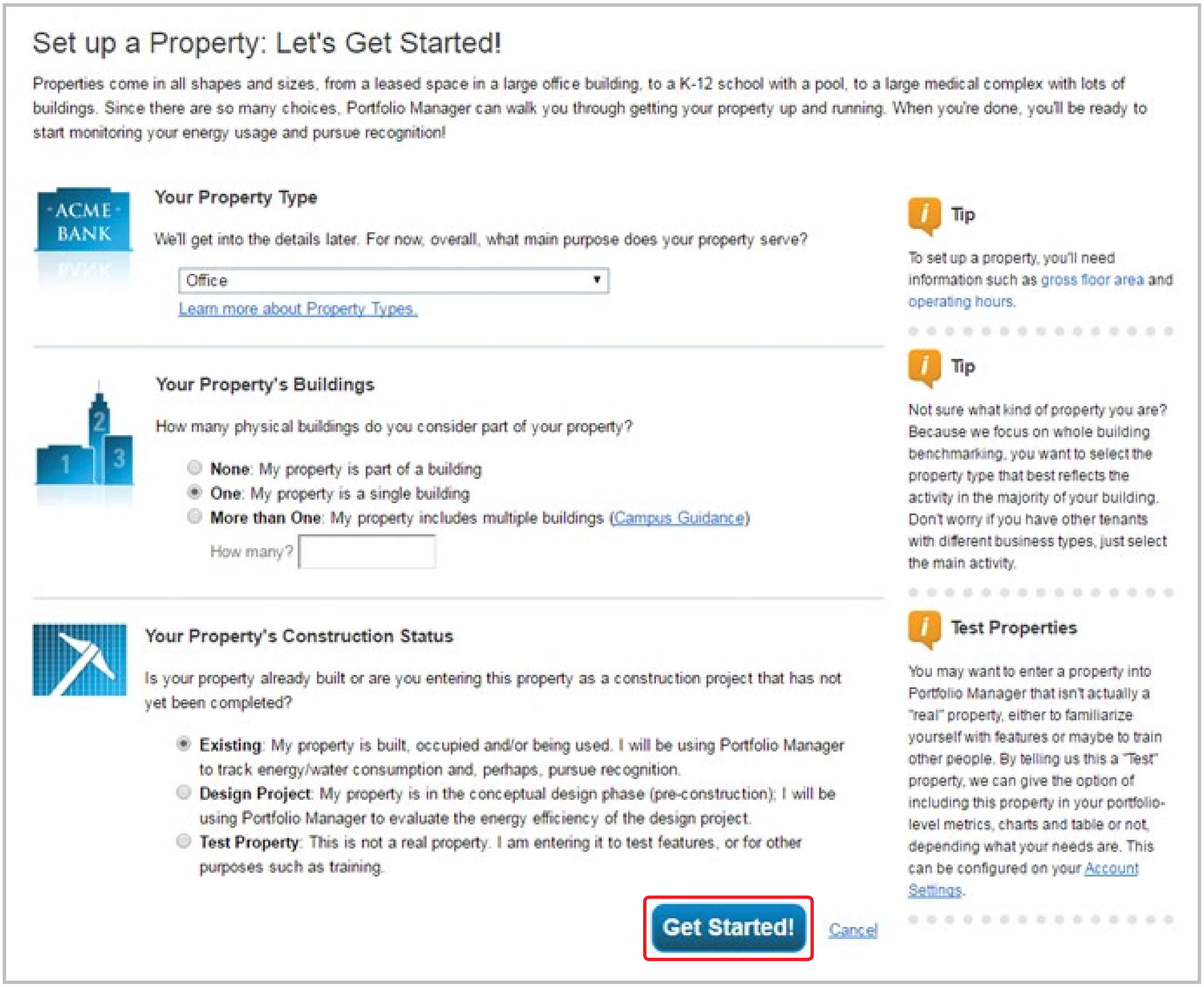
1. **Property Information**
   Primary function, name, address, year built
2. **Property Data**
   Gross floor area and use details (operating hours, computers, workers)
3. **Energy Bills**
   Invoices from all purchased and on-site generated energy (most recent 12 months)

Not sure what information you should be collecting? Generate a data collection worksheet tailored for your property at **https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet**.

Properties with Multiple Use Types

Some properties include multiple use types, such as restaurants in hotels, salons in senior care communities and cafeterias in hospitals. Generally, if a certain use commonly occurs in the type of property being benchmarked, do not break it out as a separate property use type. Simply include its square footage with the building's primary use.

See **Property Types in Portfolio Manager** on page 8 for more information.



Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!

ACME BANK

Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Office

Learn more about Property Types.

Your Property's Buildings

How many physical buildings do you consider part of your property?

- **None**: My property is part of a building
- **One**: My property is a single building
- **More than One**: My property includes multiple buildings (Campus Guidance)

How many?

Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

- **Existing**: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
- **Design Project**: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
- **Test Property**: This is not a real property. I am entering it to test features, or for other purposes such as training.

Get Started! Cancel

Tip

To set up a property, you'll need information such as gross floor area and operating hours.

Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your Account Settings.

PROPERTY TYPES IN PORTFOLIO MANAGER

Choosing a Property Type

Portfolio Manager contains more than 80 **Property Types** to choose from when setting up your property, in order to best identify the primary use of your property.

The **Property Type** indicates the single, primary use of your property. You select the type with which you most closely identify, and you can change it at any time (on the Details tab, under Basic Information).

Multi-Use Buildings

In general, EPA recommends you enter as few property uses as possible. For example, say you have an office with a restaurant, a health club and a dry cleaner. EPA recommends that you enter one property use (office) and include the gross floor area (GFA) and energy of the restaurant, health club and dry cleaner within the office property use. **This would mean you would only enter office as your Property Type when setting up the property on the first "Add a Property" page**. You would also include the property use details (number of workers, computers, etc.) from the restaurant, health club and dry cleaner with the office property use on the "**Set-up a Property: How is it Used?**" page.

There are four exceptions to this rule when you should create an additional property use:

- If it is a property use that can get an ENERGY STAR score (see Applying for ENERGY STAR certification).
- If it accounts for more than 25% of the property's GFA.
- If it is a vacant/unoccupied office or medical office (and the vacancy is greater than 10% of the GFA).
- If the weekly hours differ by more than 10% for the same property type AND that property type can get a score (ex: you have two office tenants, and their hours differ by more than 10%).

If you need to add an additional property use when initially setting up a property, on the "Set-Up a Property: How is it Used?" page, choose the drop-down to add another use.

If you've already set up your property, you can add another property use by going to the property's **DETAILS** tab. Go to the "Add Another Type of Use" drop-down in the upper right corner. Pick the new property use and click **ADD**. You can then add the necessary use details. Finally, make sure you adjust any other property uses, if needed, to ensure your total gross floor area remains consistent.

Common Property Types

A variety of property types exist in San Diego, from small retail stores to large industrial facilities. The list below highlights some common types.

- Food Sales
- Food Service
- Hotel
- Manufacturing/Industrial
- Museum
- Non-Refrigerated Warehouse
- Office
- Other
- Refrigerated Warehouse
- Restaurant
- Retail Store
- Strip Mall
- Transportation/Terminal Station (docks)

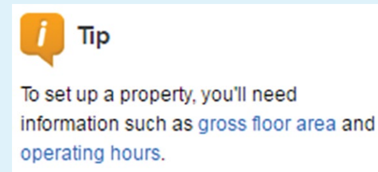
A full list of all property types, including descriptions and associated property use details, can be found at: **energystar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details**.

Set Up a Property: Basic Property Information

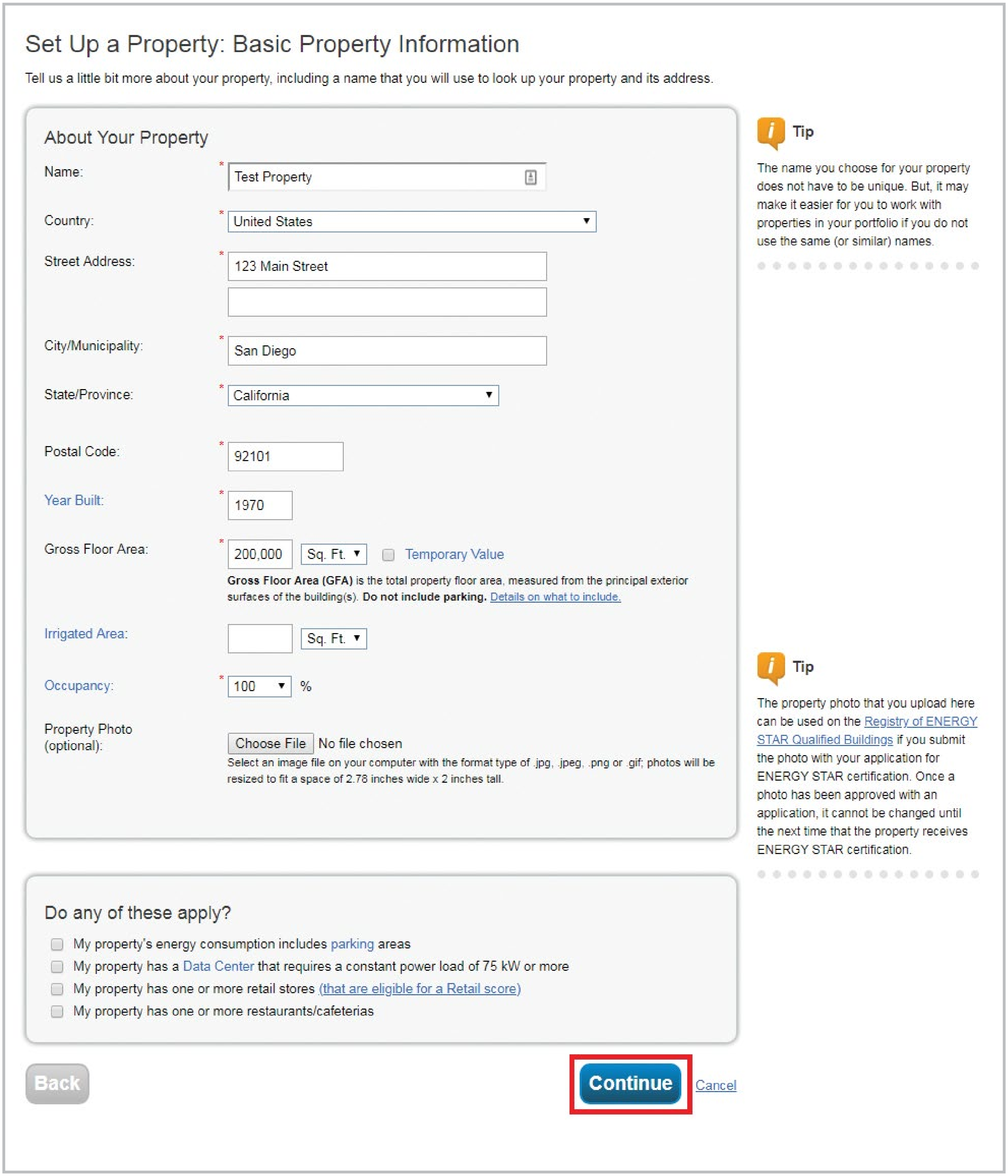
1. About Your Property
   Enter your basic property information, including the physical address, year built, gross floor area and occupancy details.
   - If you are unsure of your building's gross floor area, you can check the "Temporary Value" check box to indicate that you are not sure of the data and to flag it for later review. For benchmarking to comply with a legal requirement, you will not want to have any temporary values in your final submission, so don't forget to update these values at a later date.
   - Irrigated area can be left blank unless your property has a dedicated outdoor water meter and you would like to calculate the outdoor water use intensity (water used per square foot) for your property.
   - For occupancy, you will typically enter 100%. However, in some cases, your building may not have 100% occupancy. For example, if you have a ten-story building, but only nine floors are leased, then your property would be 90% occupied.

2. Do Any of These Apply?
   Answer the additional questions shown on the bottom of the page.
   - These questions differ based on your property's primary function and will help guide Portfolio Manager in asking additional questions on subsequent pages in order to describe your property accurately.
   - NOTE: You should not include parking area in the gross square footage for your property. If the parking area uses energy (e.g., lighting) and is not separately metered, then select "my property's energy consumption includes parking areas" and you will enter more information on a subsequent screen. Once you have entered all information, click **CONTINUE**.

Tips & Tricks

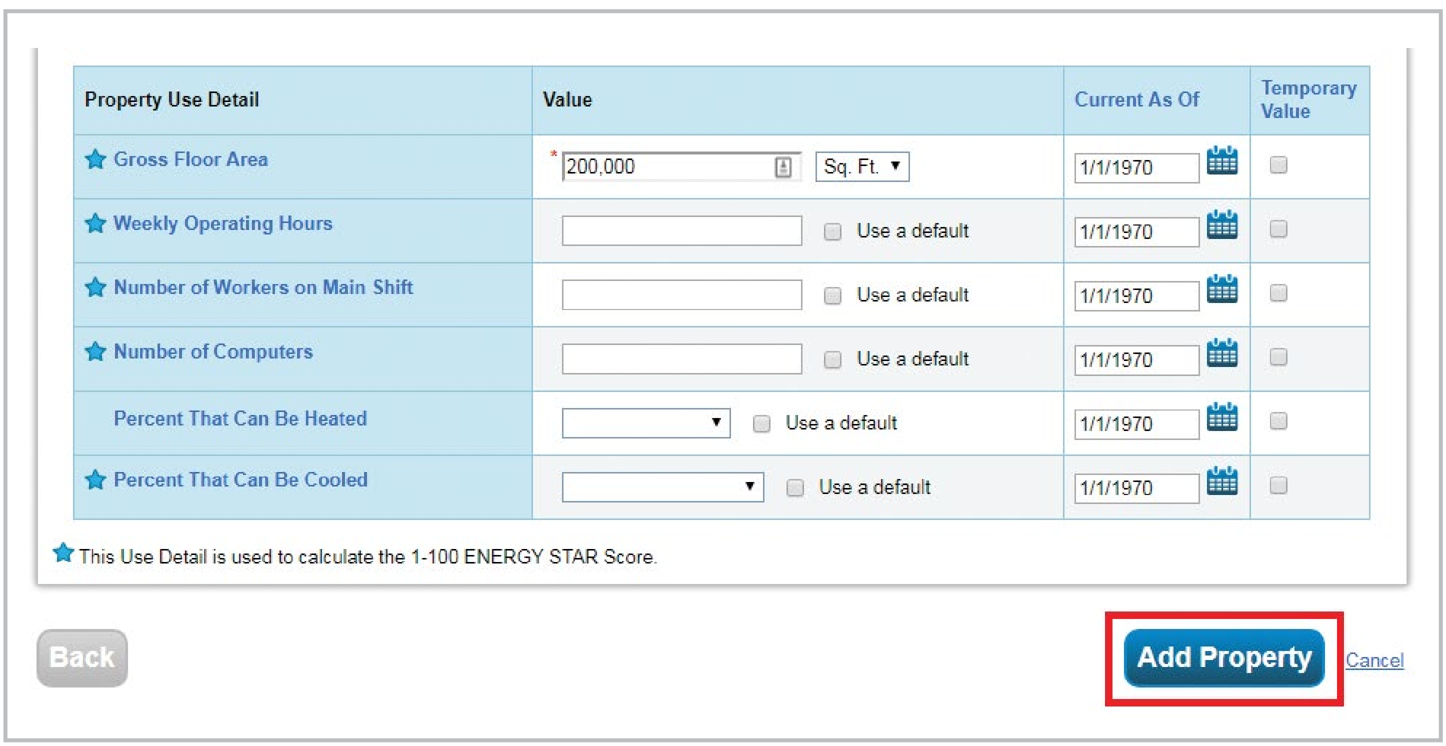


Throughout Portfolio Manager, you will see tips, like the one above, to help guide your data entry. You can look up definitions for key terms listed in blue by hovering over the term. If you need further explanation, you can click the link, and it will bring you to the full definition in the EPA glossary.


Set Up a Property: Basic Property Information
Tell us a little bit more about your property, including a name that you will use to look up your property and its address.
About Your Property
Name: * Test Property
Country: * United States
Street Address: * 123 Main Street
City/Municipality: * San Diego
State/Province: * California
Postal Code: * 92101
Year Built: * 1970
Gross Floor Area: * 200,000 Sq. Ft. Temporary Value
Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. Details on what to include.
Irrigated Area: Sq. Ft.
Occupancy: * 100 %
Property Photo (optional): Choose File No file chosen
Select an image file on your computer with the format type of .jpg, .jpeg, .png or .gif; photos will be resized to fit a space of 2.78 inches wide x 2 inches tall.
Tip
The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.
Tip
The property photo that you upload here can be used on the Registry of ENERGY STAR Qualified Buildings if you submit the photo with your application for ENERGY STAR certification. Once a photo has been approved with an application, it cannot be changed until the next time that the property receives ENERGY STAR certification.
Do any of these apply?
My property's energy consumption includes parking areas
My property has a Data Center that requires a constant power load of 75 kW or more
My property has one or more retail stores (that are eligible for a Retail score)
My property has one or more restaurants/cafeterias
Back
Continue
Cancel

Set Up a Property: How is it Used?

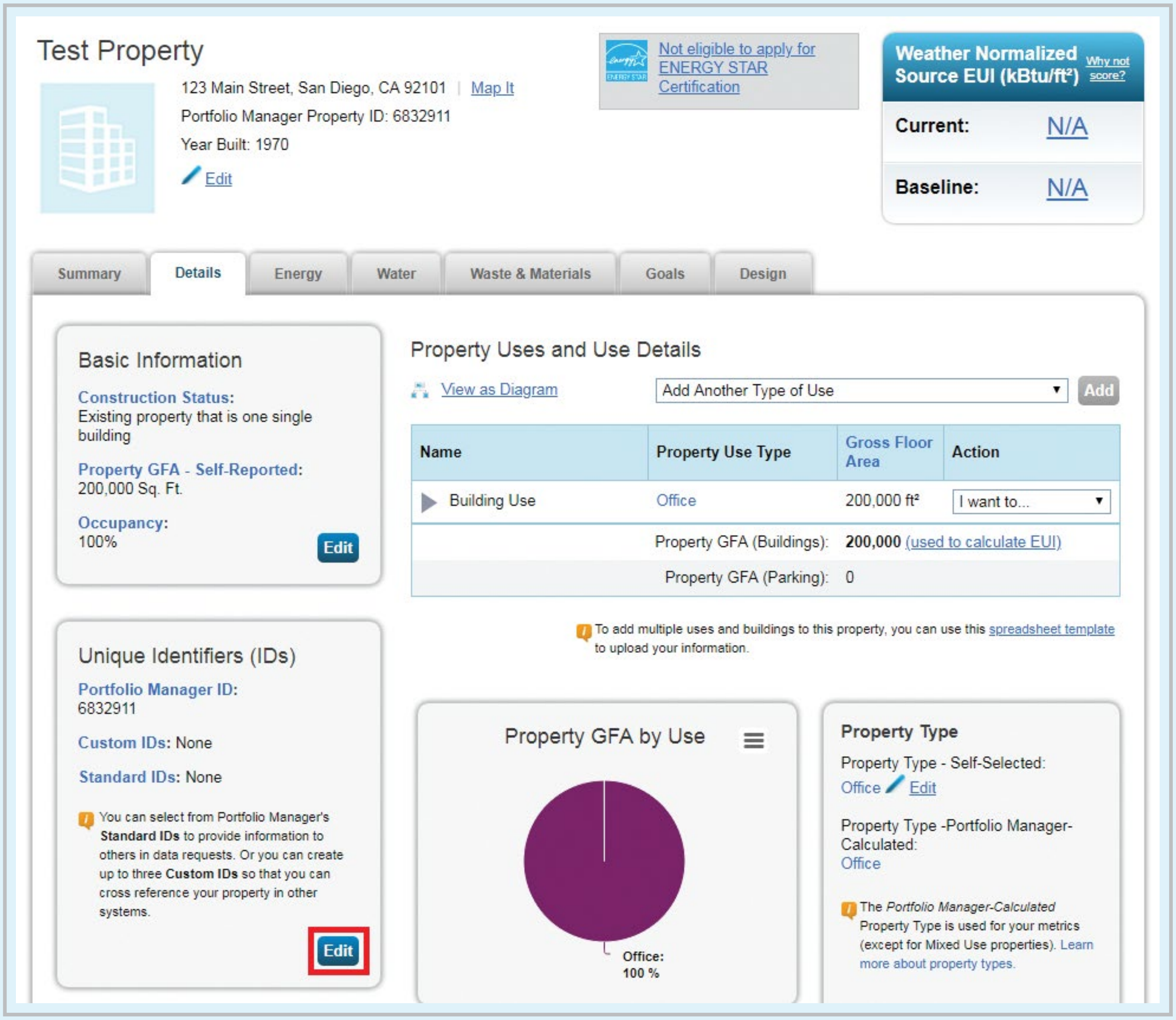
1. On the next page, you will enter specific use details for your property, such as gross floor area, operating hours and number of workers for each type of use.
   - If you are unsure of what to put for these property use details, you can check the box next to "use a default," which will generate a default number for that property use based on your square footage and property use type.
2. The next column allows you to enter the "current as of" date for each property use. This feature is useful if you want to track the changes in your property use over time.
   - By default, it will enter January 1 of the year the building was built.
3. The last column allows you to mark a temporary value for any values you might be unsure of. You can come back and edit those later.
4. Once you have added all of your use details for your property, click **ADD PROPERTY**.
5. You will see a congratulations message in the top area of your screen in a green box and the screen shows you a "property level" view. On the **SUMMARY** tab, you will see boxes to show if you have any notifications regarding your property and a summary of key metrics.
6. To view, input or edit property information, use the **DETAILS** tab.
   - Here, you will see basic property information, as well as information about your property's use, the option to add additional use types to the property and a drop-down box that allows you to make edits and updates to this information.



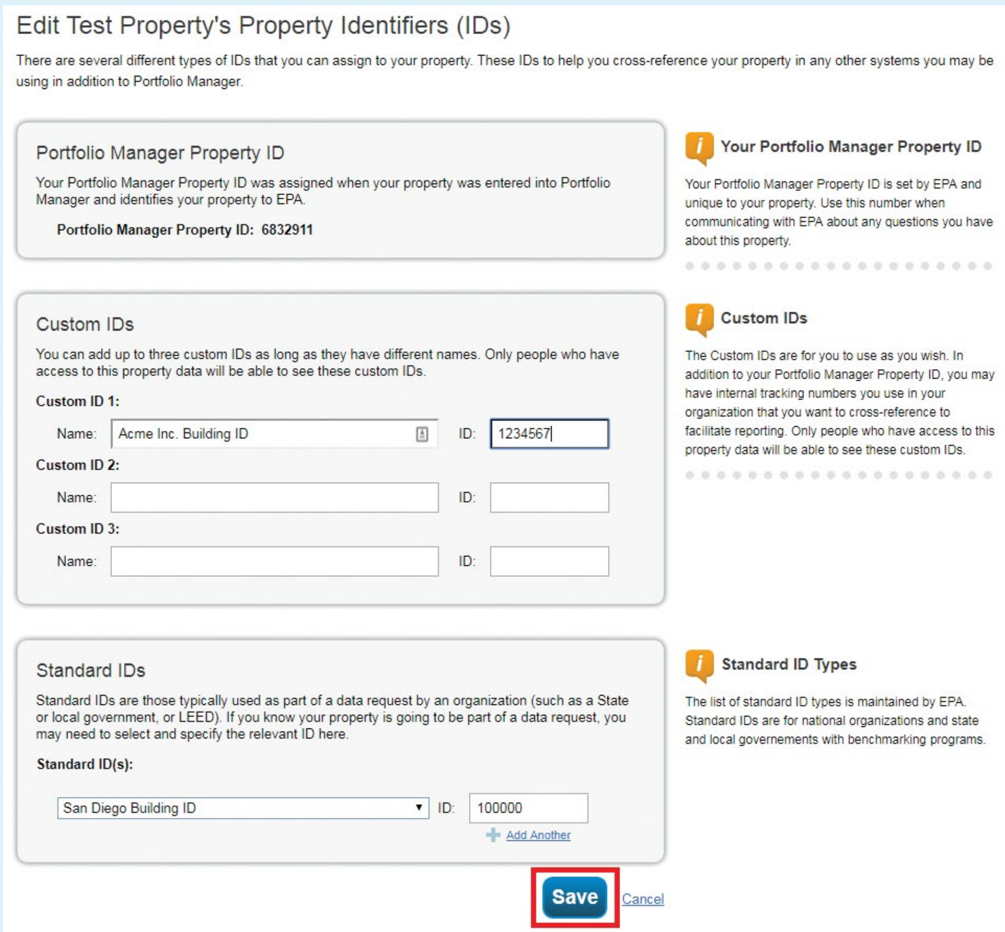
ADDING UNIQUE IDENTIFIERS TO YOUR PROPERTY

While the California Energy Commission currently does not require unique identifiers for their benchmarking program, the City of San Diego does. Additionally, certain programs, like LEED® and CoStar®, have unique identifiers for your property as well. Using the following steps, you can add the unique identifiers needed to your property.

1. After your property is created, click on the **DETAILS** tab.
2. Under this tab you will see a section called "Unique Identifiers (IDs)." Click **EDIT** to add your property's unique ID(s).



3. For most users, you will search for your standard ID and input your ID number from that organization. You can add more if needed. If your organization has separate building asset numbers or IDs for your properties, you can add those under the Custom ID section. The following image shows what your response would look like with your City of San Diego Building ID number, along with a custom ID.



4. Click **SAVE** to update your building's IDs. You will see a green box confirming the update and the number of unique IDs will be displayed in the Unique Identifier Box.

Where Do I Find My Building ID for State and Local Compliance?

As of June 1, 2019, there is not a State of California building ID system for compliance with Assembly Bill 802. This may change in the future, so check **energy.ca.gov/benchmarking** for updates in future reporting years.

For buildings within the City of San Diego, you can look up your building's unique ID at **sandiego.gov/benchmark**. Please note that not all required properties might not be listed. If you cannot find your property, email **energybenchmarking@sandiego.gov** to request a building ID be assigned to your property.

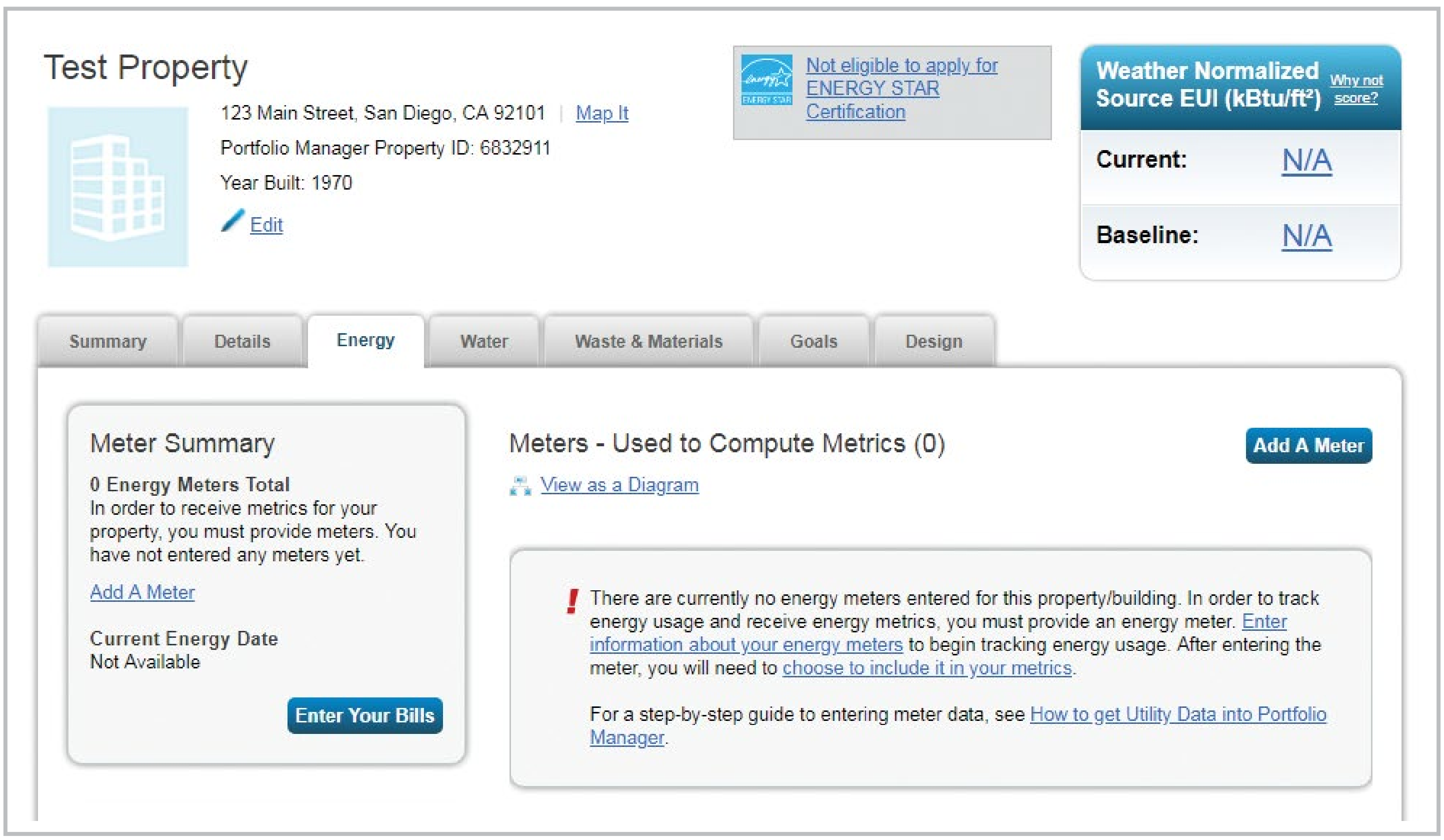
3) Manually Entering Energy Consumption Data

Once you create your property in Portfolio Manager, you will want to enter your property's energy and water consumption data. Before proceeding with setting up your energy meters, consider whether you would like to automate your data connection with your local utility (for example, you need to make an aggregated data request). Some utility connections will create meters for you, so you do not need to set them up yourself. For example, when connecting with San Diego Gas & Electric®, you will want to skip this step for your electric and gas meters and proceed with requesting data through SDG&E's Benchmarking Data Request Portal. Learn more at **sdge.com/benchmarking** and review the SDG&E Data Request User Guide for step-by-step instructions.

For those syncing individual meters with the utility, keep in mind that the utility sync typically provides only consumption information, and probably will not include any cost, demand, or demand cost data.

Properties with On-Site Generation

Note that if you have on-site generation, even if you sync your meters with your local utility, you still will need to account for your solar generation. Please refer to **Energy Data Reporting for Properties with On-Site Generation** to learn more about how to accurately track and report both your on-site generation and your electric grid consumption.



Adding Solar Meters

If you have solar generation on-site, please add a solar electric meter by checking the boxes next to "Electric" and then "generated on-site with my own solar panels." You still will need to add a meter for electricity you "purchased from the grid."

If you are on a net-metered rate, you may need to make additional adjustments to your meter entries to accurately account for your building's total energy consumption. See the **Energy Data Reporting for Properties with On-Site Generation** insert.

Removing Non-Building Energy Use

For building owners with large amounts of nonbuilding energy use tied to a building meter (for example, electric vehicle charging, shore power or cell towers), you will need to add an additional "purchased from the grid" electricity meter and add the *negative* value of your submeter readings to discount that nonbuilding energy usage from your building's total energy consumption.

Learn more by visiting the Portfolio Manager FAQ on "**What can I exclude from my property?**"

Setting Up Meters

1. Click on your property from the **MYPORTFOLIO** tab; then, select either the **ENERGY** or **WATER** tab.
2. Click **ADD A METER** on the right-hand side of the page.
3. Select the type of energy or water used.
    - In most cases, for energy, you will mark "electricity" and "natural gas."
    - Choose "Mixed Indoor/Outdoor" for your water meter if you only have one meter that captures both your indoor and outdoor water consumption.
4. For each type of energy or water meter selected, enter the number of meters to create.
5. Click **GET STARTED!**

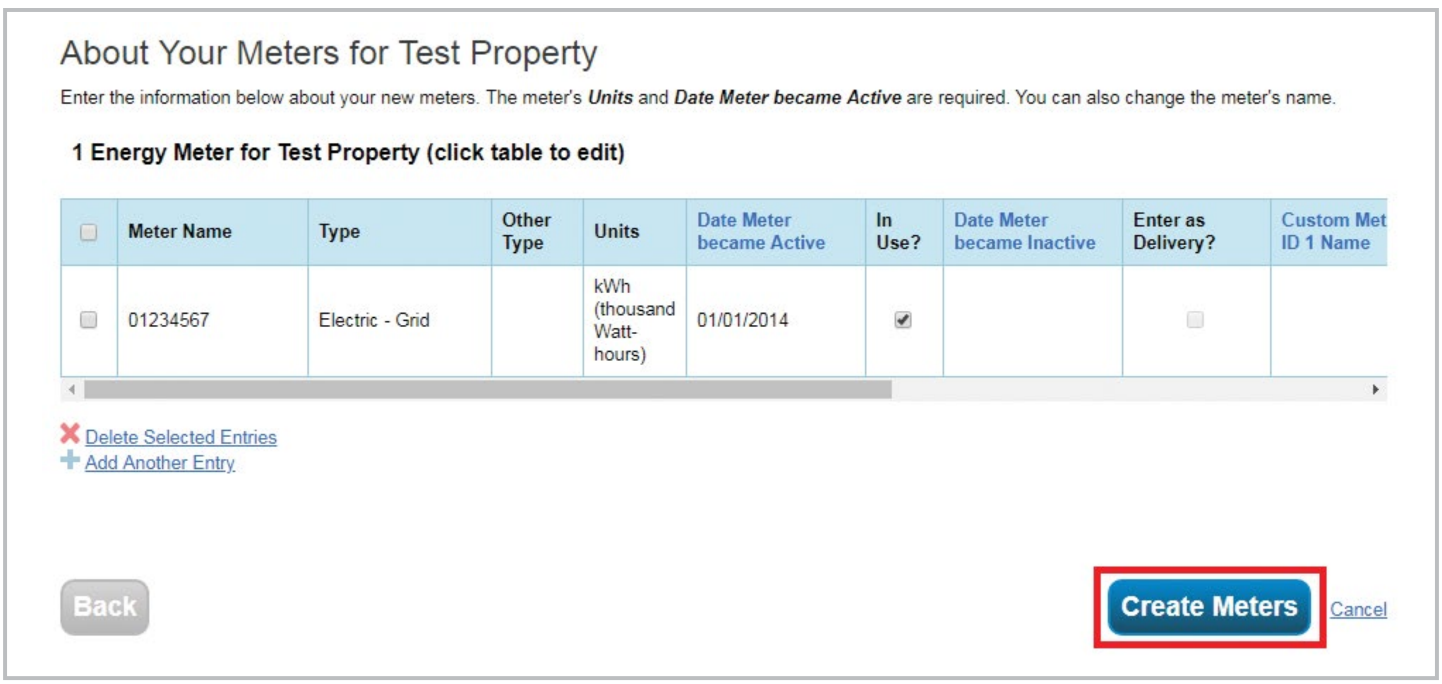
About Your Meters

1. Click on a meter to edit its details.
2. Change the meter name to something more descriptive (meter number, account number, or what it services).
3. Choose the following standard units based on your meter and units used on your utility bills.

   Standard units are as follows:

Electric	kWh (1,000 watt-hours)
Natural gas	therms
Water	ccf (hundred cubic feet)

4. Mark the date the meter became active for all meters (both active and inactive).
   - If you are entering a currently active meter, leave the "In-Use?" check box checked and the last column blank (this is the most likely scenario).
   - If you are entering an inactive meter, uncheck the "In-Use?" check box and enter the date the meter became inactive in the last column.
5. If this meter reflects a bulk fuel purchase for an energy meter, select the "Enter as Delivery?" check box (e.g., propane tanks delivered to your property). This does not apply for water meters.
6. Repeat these steps for each meter you created; then, click **CREATE METERS**.



Entering Meter Data

There are three main ways to enter meter data:

1. Manually
2. Uploading a spreadsheet
3. Connecting with SDG&E *(electric and gas energy meters only)*

Custom Meter IDs

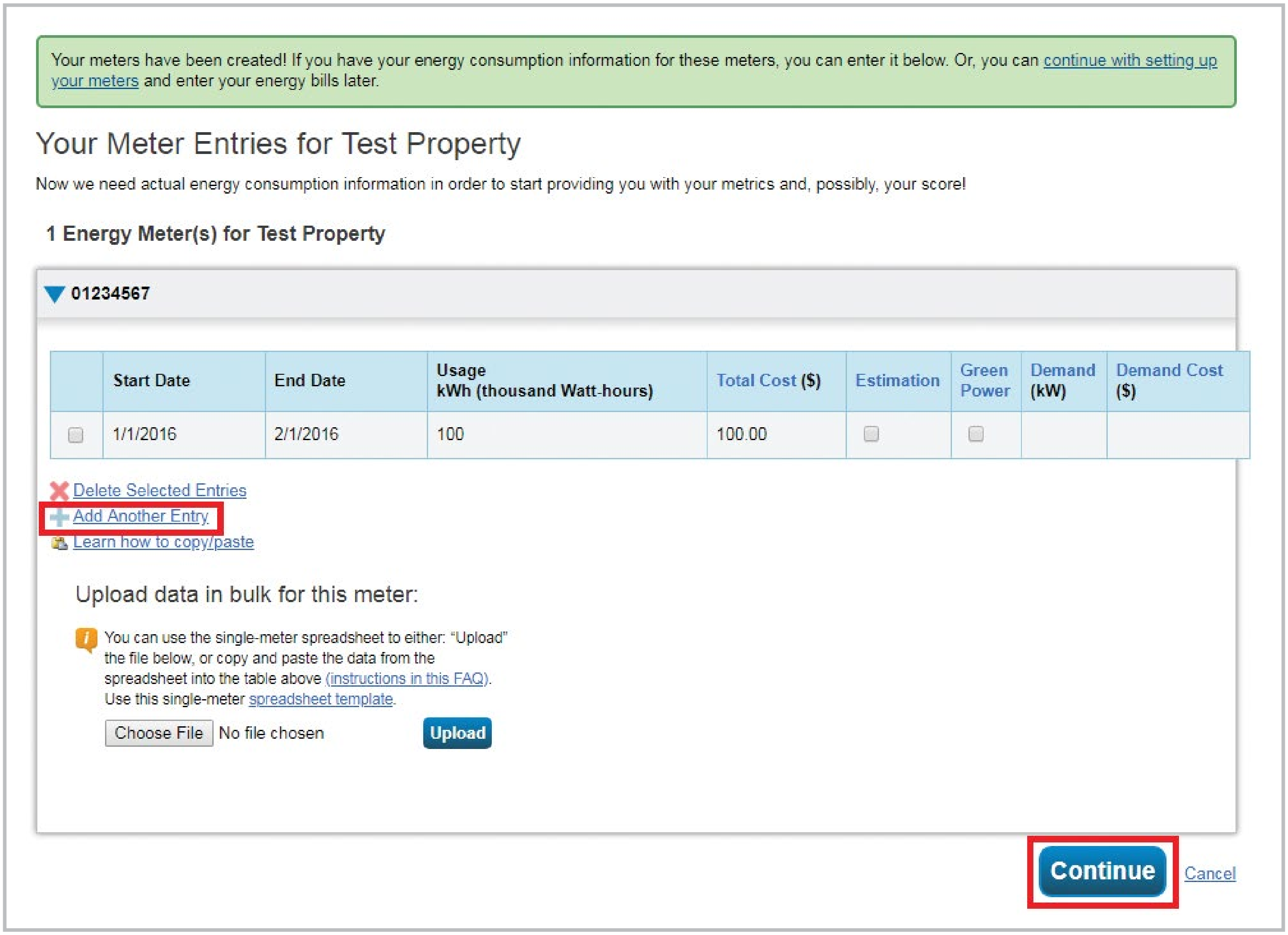
You can use the custom meter ID fields to track multiple attributes of a meter. For example, you can rename the meter to your utility meter number, and then add a custom ID name and value for your utility account number associated with that meter. Custom meter names are not required for compliance.

Add Meter Entries

Click the gray arrow next to each meter to expand the section on the Your Meter Entries page. Following are the three ways you can add your meter data.

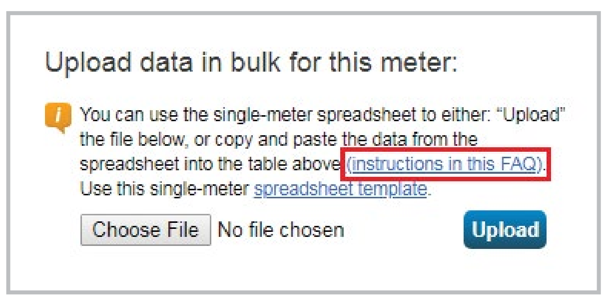
Option 1. Add Meter Entries Manually

1. Click **ADD ANOTHER ENTRY** under the meter.
2. Using your utility bills, enter the start and end dates of your bills, the total usage information and cost (not required).
3. If you are unsure of the values on the bill, you can check the "Estimation" box to flag the entry for later review.
4. "Green Power," allows you to identify that some of your meter's energy is from purchased off-site green power (such as wind or solar); green power generated on-site should be tracked in a separate meter.
5. To delete an entry, click the check box in the far left column for the entries you wish to delete, and click **DELETE SELECTED ENTRIES**. Click **CONTINUE** to complete deleting your entries.
6. Complete your meter entries by clicking **CONTINUE** in the bottom right-hand corner of the page. You will receive a notification in a green box on the next page that your meter entries have been successfully added.



Option 2. Add Meter Entries by Spreadsheet Upload

1. Alternatively, you can upload your meter entries in bulk using a spreadsheet. Review the instructions in the FAQ document (see image below).
2. Download the spreadsheet template and enter your usage information.
3. After you enter your usage information into the template, save it to your computer.
4. Click **CHOOSE FILE** or **BROWSE** (depending on your browser) to select the file from your computer.



5. Click **UPLOAD**. After uploading your spreadsheet, you should see meter entries on the page.
6. Complete your meter entries by clicking **CONTINUE**. You will receive a notification in a green box on the next page that your meter entries have been successfully added.

Option 3. Add Meter Entries by Connecting with Your Local Utility (Energy Meters Only)

State Assembly Bill 802 includes provisions for building owners and operators to obtain whole-building energy usage information directly from utilities, providing certain aggregation thresholds are met. The data access provisions ensure building owners can access the data they need to properly benchmark their building's total energy consumption. These are the current aggregation thresholds.

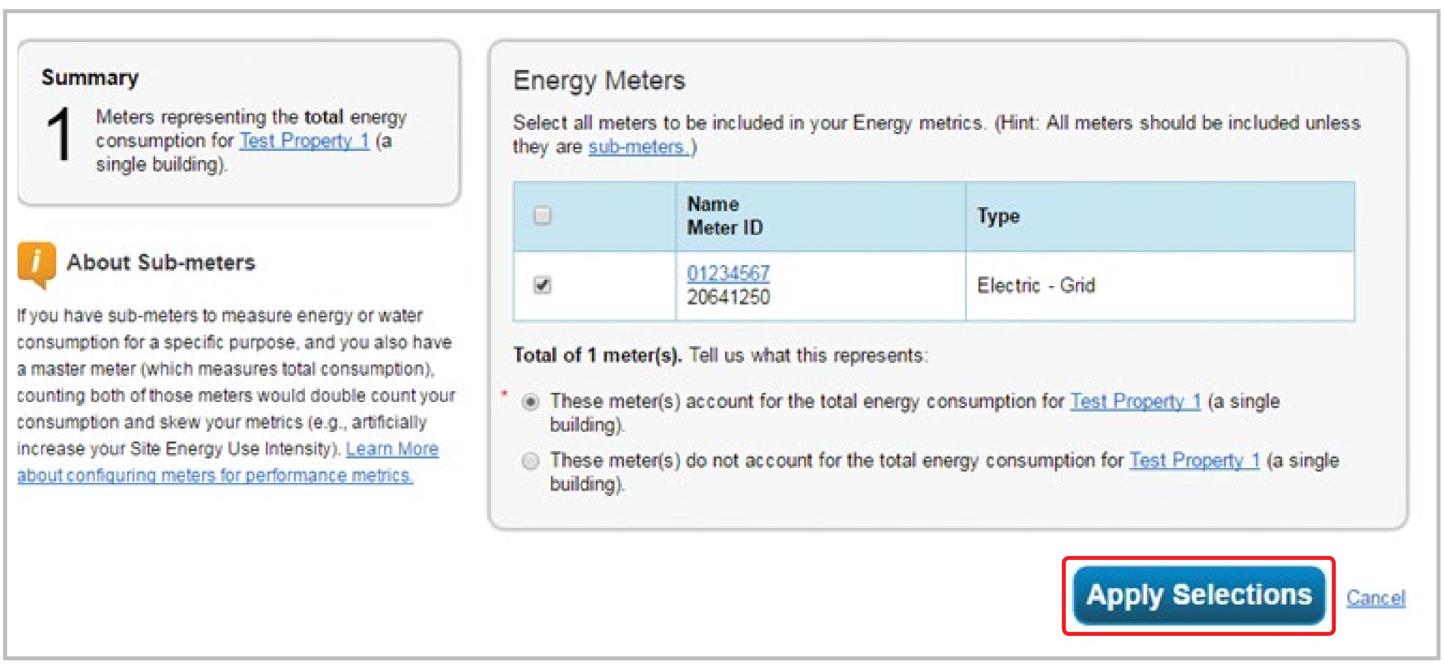
3+ utility accounts of an energy type for buildings with only commercial accounts

5+ utility accounts of an energy type for buildings with one or more residential accounts

To request your data, visit your local utility's benchmarking page. In SDG&E territory, **visit sdge.com/benchmarking**. For SDG&E customers, you can request both aggregated (whole-building data) or nonaggregated (meter-by-meter data).

Select Meters to Include in Metrics

1. Select the boxes of the meters that total your property's energy or water use.
   - In some cases, you might want to leave some meters unchecked. For example, if you have a main meter and a pool that is submetered, but whose energy is also captured by the main meter, you will only want to have the main meter checked as this prevents double counting of your pool's energy consumption.
2. Select the first button to state that the meters selected account for your property's total energy or water consumption.
3. Click **APPLY SELECTIONS**.
   - You will receive a congratulations message saying, "Congratulations! Any energy/water meters you selected have been successfully associated to your property(ies)."



Energy Data Reporting for Properties with On-Site Generation

Entering On-Site Generation

To enter on-site green power (**your solar panels/wind turbine**) you need two different electric meters.

1. **One meter for your grid electricity.** Almost all buildings with solar (or wind) still use energy from the grid, even buildings that generate more energy than they use each month. Most buildings don't have the capacity to store the energy they generate to be used later, when the sun isn't shining (or the wind isn't blowing). Any energy the building uses that physically comes from the grid should be entered here as grid electricity. It's not sufficient to enter a "net" meter, which only shows the difference between the energy you import from the grid and the green power you export back to the grid.
2. **One meter for your on-site green power.** This will track all of the electricity generated by your solar or wind system. You may generate more energy than you can use, so you will enter both the energy that you generate and the energy that you export back to the grid.

Now, you are ready to **enter on-site green power consumption data**.

Adding monthly meter entries

After you've **created the two meters that you need** to track your on-site green power (**solar or wind**), you'll need to enter your monthly usage. Make sure you enter A, B and C from the following diagram

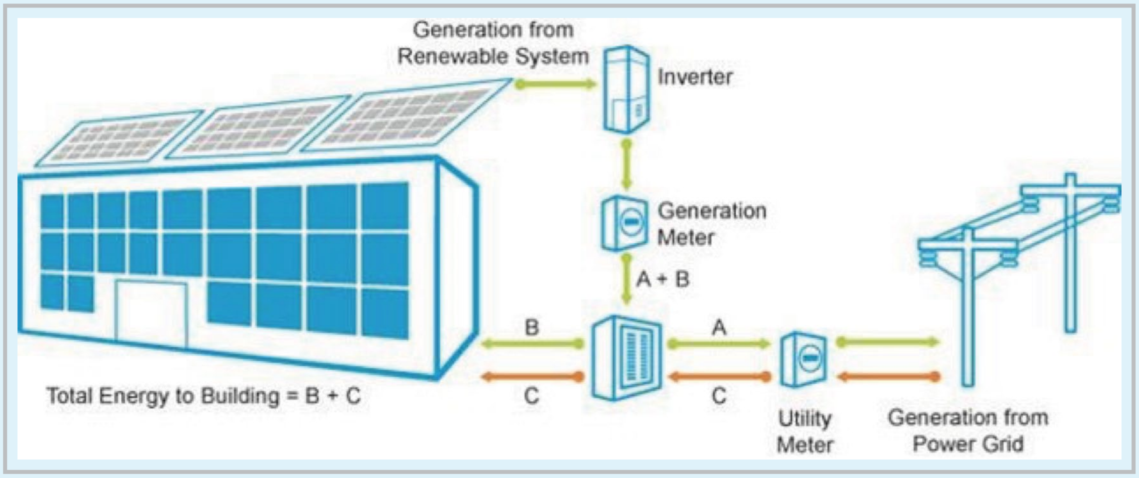
For Your On-site Green Power Meter (solar panel meter)

- **Energy used on-site**: This is the energy that you generated from your solar (or wind) system and used in your building. In the diagram, it is "B."If it accounts for more than 25% of the property's GFA.
- **Energy exported off-site**: This is the energy that you exported to the grid. In the diagram, this is "A."
- **Estimation**: Y/N whether you've entered an estimated value
- **REC ownership**: Do you own the environmental benefit of this "green power?" **See FAQ for an explanation**.

For Your Electric Grid Meter

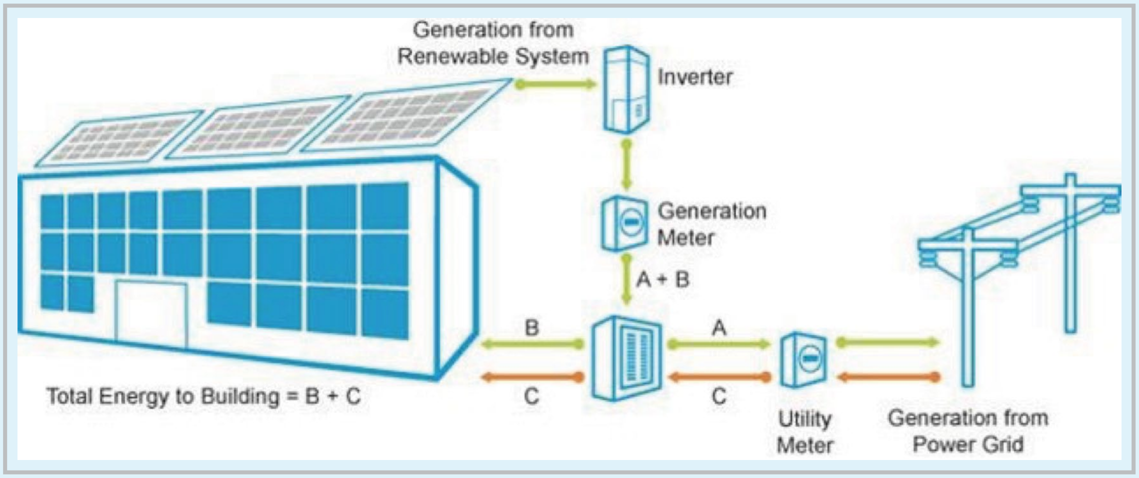
- **Energy grid energy**: This is the energy that you got directly from the grid. In the diagram, this is "C."

Energy Data Reporting for Properties with On-Site Generation (Continued)



Accounting for Net Metering

If you receive only a net-metered bill from your utility, meaning your bill only shows the difference between the energy you imported from the grid minus the energy you exported (C – A in the diagram), then you'll need to calculate the values for A, B and C using your bill and your organization's internal records.



As explained in Part 2 of FAQ, three values are required if you have on-site green power.

- A: The energy you generated on-site and exported to the grid
- B: The energy you generated on-site and used on-site
- C: The energy you purchased from the grid

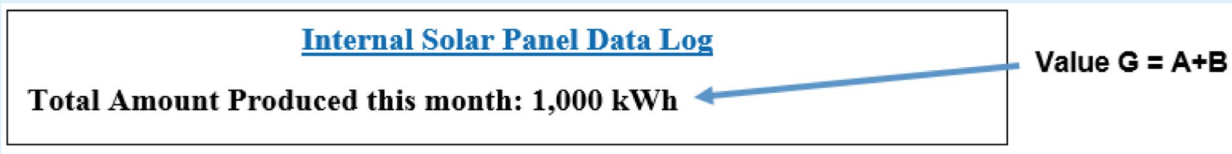
If you have a net metering setup, you may not have access to A, B and C. But, you may have access to other factors.

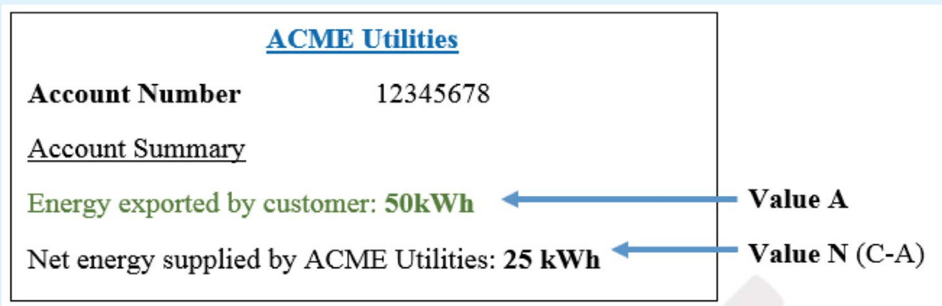
- G (Generated): Total on-site energy generated, G = A + B
- N (Net): Total net energy from the grid, N = C - A

Energy Data Reporting for Properties with On-Site Generation (Continued)

Example

Below is an example of calculating A, B and C, when your energy bills are net metered.

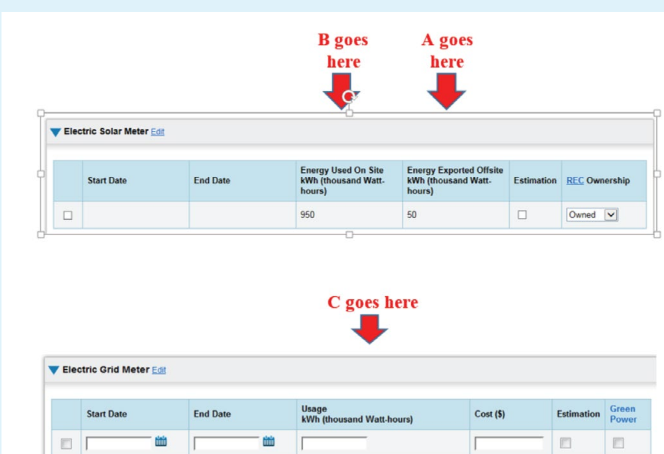




Value A: The energy you generated on-site and EXPORTED TO THE GRID. Get this value from your utility bill (or from your organization's data logs) and enter it in the "Energy Exported Off-site" column for your On-site Green Power meter, as shown in the following diagram. In this example, the value is 50 kWh and comes from the utility bill.

Value B: The energy you generated on-site and USED ON-SITE. Take value G (Generated) that you obtained from on-site measurements of energy production (in this case 1,000 kWh) and subtract A (50 kWh), then enter the result in the "Energy Used On-site" column of your on-site meter, as shown (950 kWh).

Value C: The energy you purchased from the grid. Take value N from your utility bill (25 kWh) and add A (50 kWh) to calculate the total amount of energy the building used that was physically supplied by the grid (75 kWh). Input this value in your Electric Grid meter.



Please note that if you never export energy (in other words, your system always uses more energy than is generated), then C = N, or your energy purchased from the grid equals the net energy consumption shown on your utility bill. Additionally, on your solar meter, you would enter your total generation data for B, since 0 is exported off-site (A).

It may be helpful to set up formulas to run these calculations within a spreadsheet so you don't need to repeat the calculation manually each month.

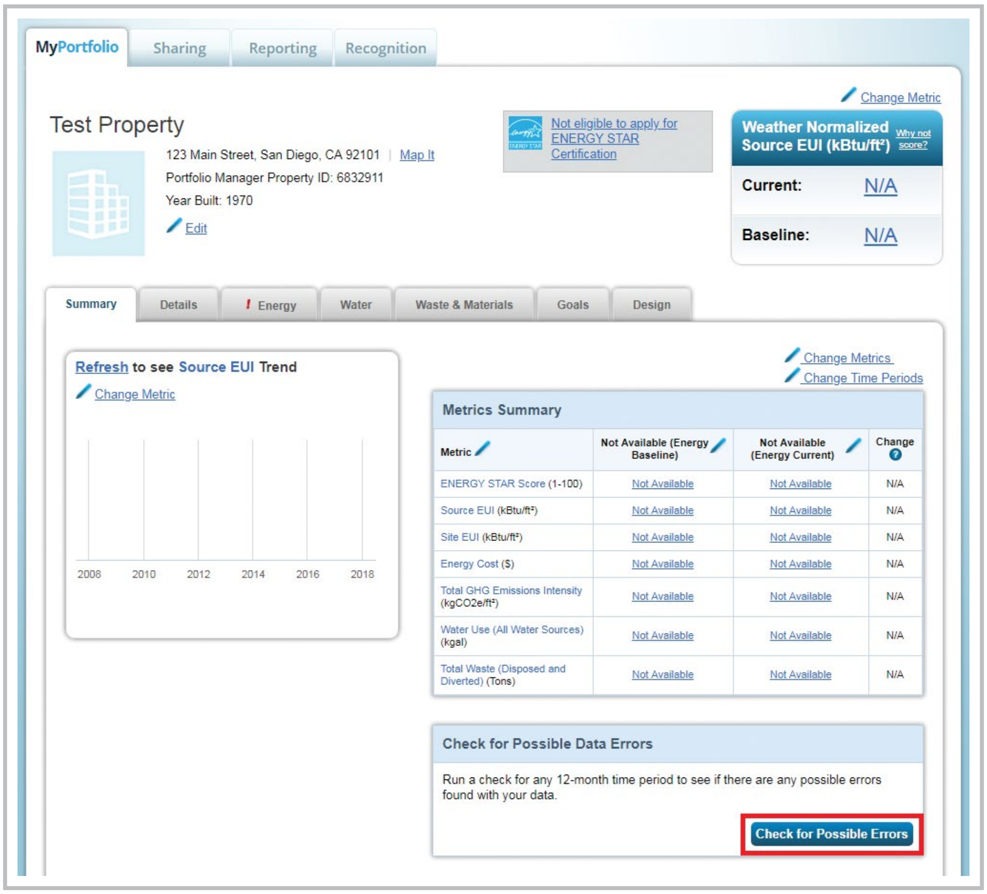
For more information, refer to the ENERGY STAR® **Technical Reference on Green Power**.

4) Reporting for State and Local Compliance

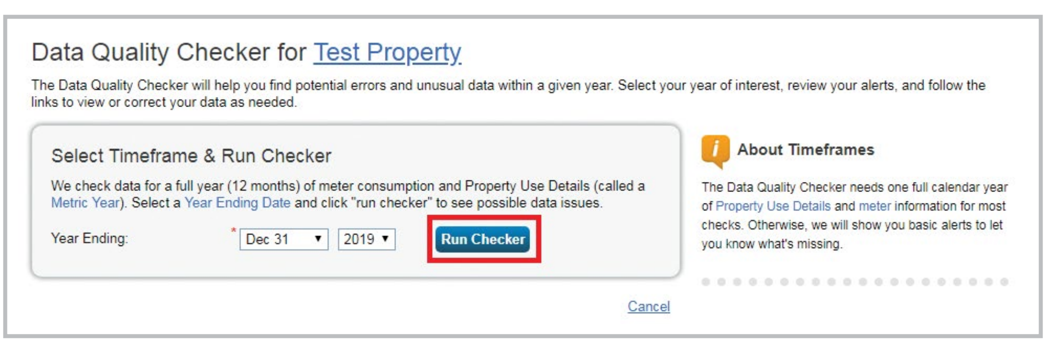
Validating Data

Prior to submitting your building report for state and local compliance, you will need to run Portfolio Manager's Data Quality Checker tool and fix any errors found. To run the tool, follow these steps.

1. Navigate to your property name in Portfolio Manager and click it to go to your property's **SUMMARY** tab.
2. Click **CHECK FOR POSSIBLE ERRORS** to start the data quality checker tool.



3. Select the time frame to run the checker. You will want to choose December 31 for the year of data you are reporting. For example, for the June 1, 2019, deadline, you will be reporting calendar year 2018 data, so you would choose Dec 31, 2018. Then, click **RUN CHECKER**.



4. Review the errors found and fix them. Once fixed, run the data quality checker again to ensure no issues remain. Note that issues with a red stop sign must be fixed, while issues with a yellow triangle indicate a potential data issue, but perhaps not.

Accessing Reporting Link

Reporting for State Compliance

For those needing to report data to the California Energy Commission, visit **energy.ca.gov/benchmarking** to access the current year's reporting links.

If you are requesting an exemption, email your exemption request to **benchmarking@energy.ca.gov** prior to submitting your report.

Reporting for City of San Diego Compliance

At time of publication, the City of San Diego is the only jurisdiction within San Diego County with an approved benchmarking disclosure and transparency program.

To access the City of San Diego's reporting links, visit **sandiego.gov/benchmark**.

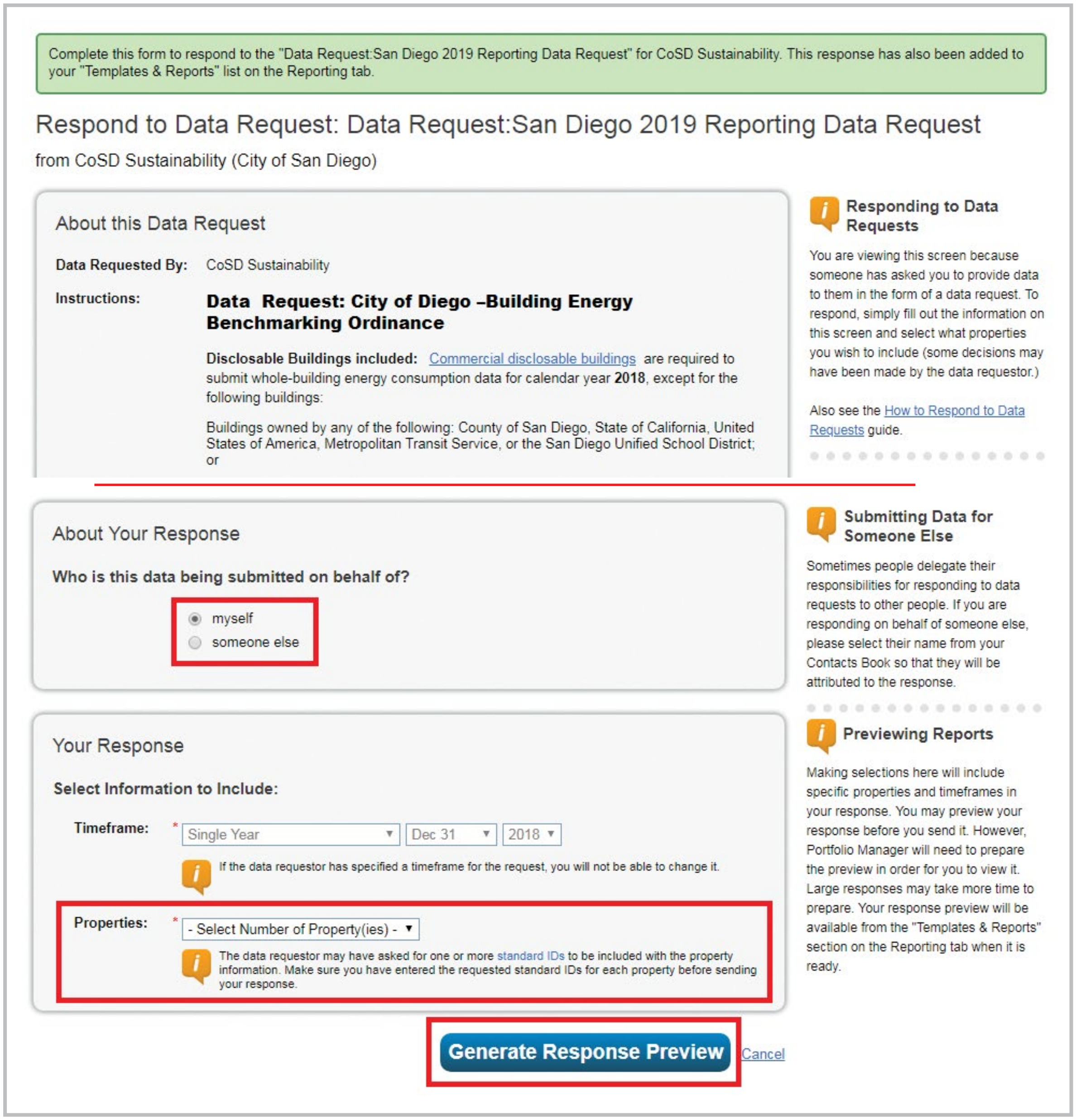
If you are requesting an exemption, email your exemption request to **energybenchmarking@sandiego.gov** prior to submitting your report.

Complying by Generating a Reporting Response Template

While the following sample images feature the City of San Diego's reporting template, whether you are reporting to the City of San Diego or the state, the process is the same once you click the reporting link.

1. See the preceding section to navigate to the correct reporting link for the state or your local jurisdiction. If you have received an approved exemption request, you will choose the second link to report only building characteristic data. Click the appropriate reporting link.
2. Log in to Portfolio Manager.

3. You will now be on a page that starts with "Respond to Data Request." Scroll down to the bottom of the page to complete your submission.



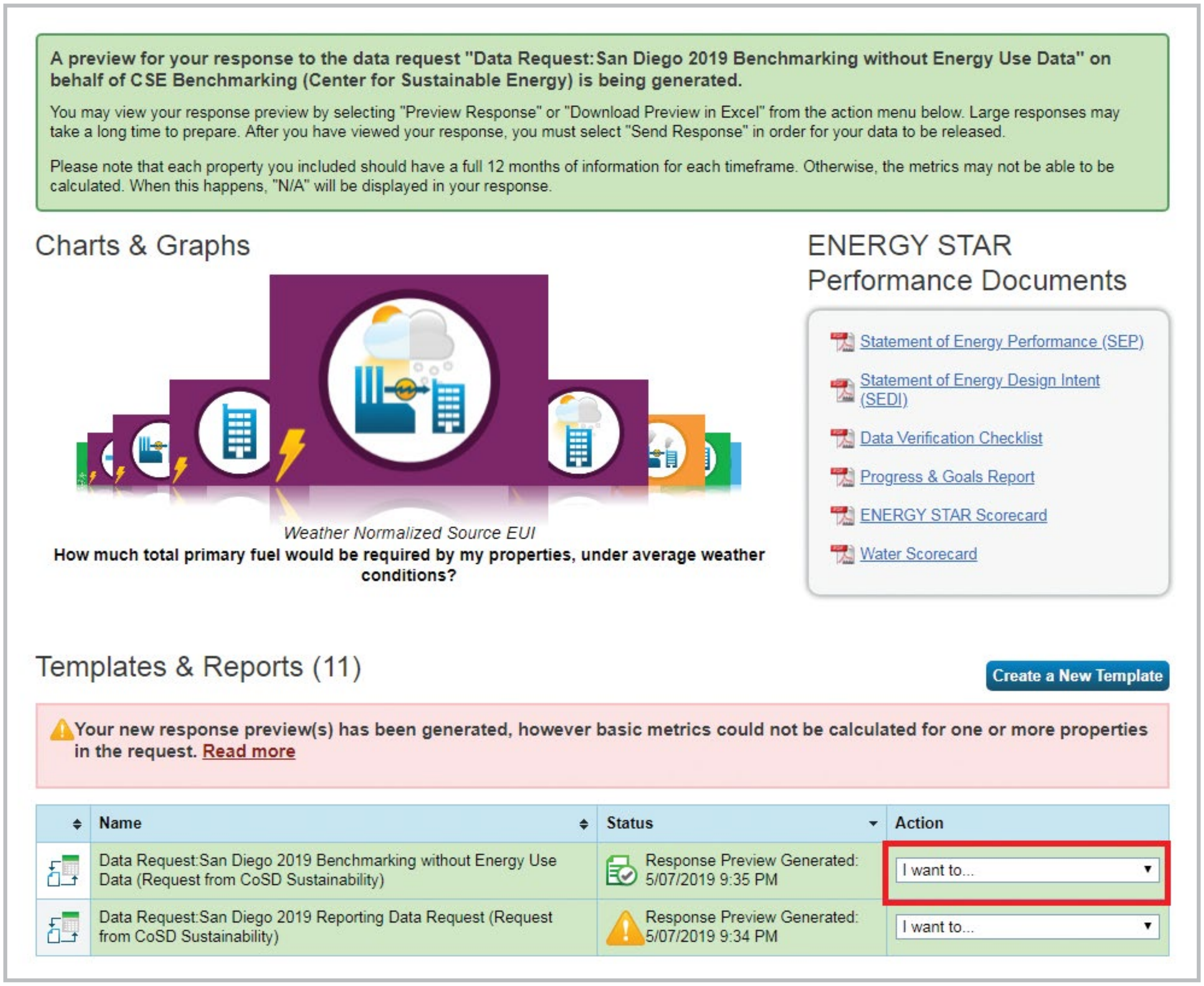
a. Answer on behalf of whom you are submitting the data. If you are not submitting on behalf of yourself, please choose the appropriate contact name in the drop-down box.

b. The time frame cannot be edited since it is a standardized request.

c. Under properties, select one or multiple properties to submit in your request. If you have multiple properties that need to report, you can choose to submit them all at once or one by one.

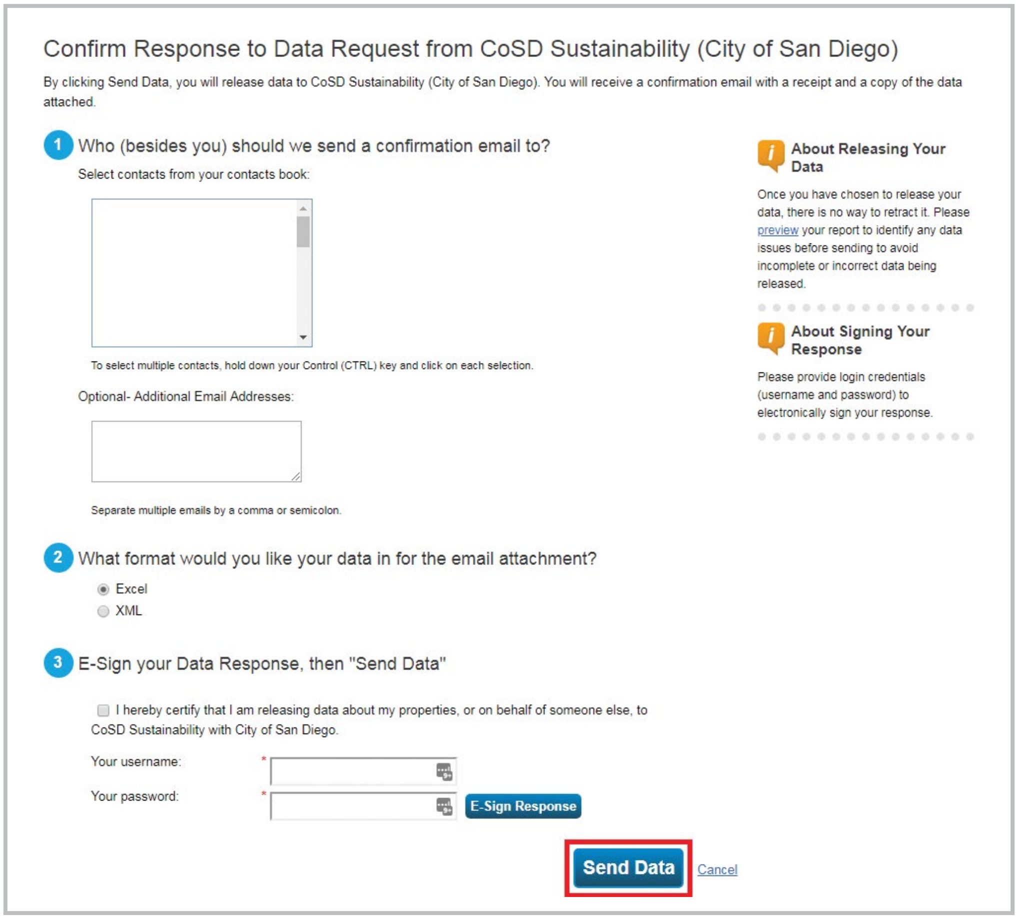
d. Click **GENERATE RESPONSE PREVIEW** to proceed. You will see a green notification message at the top of screen.

4. Scroll down on the page to review the report you just generated a response for, highlighted in green.
   a. If you see a yellow triangle, please rerun the data quality checker and resolve any remaining errors.
   b. If you see a document icon with a check mark, your submission is ready to submit. As shown in the image, under the action column, click the "I want to…" drop-down to reveal a list of options.



      i. Edit properties and time frames – update the properties selected for reporting
      ii. Preview response – review data prior to submission
      iii. Download preview in Excel – download your data to Excel
      iv. Generate an updated response – choose this if you updated your data and need to resubmit
      v. Send response – this will report your data to whomever requested it
      vi. Delete response – delete the response preview from your account

5. When you are ready to submit, select **SEND DATA** from the drop-down.



a. Select contacts or add emails to receive the response confirmation.

b. Choose the desired data format (most will choose Excel).

c. E-sign your release and click **SEND DATA** to complete your submission.

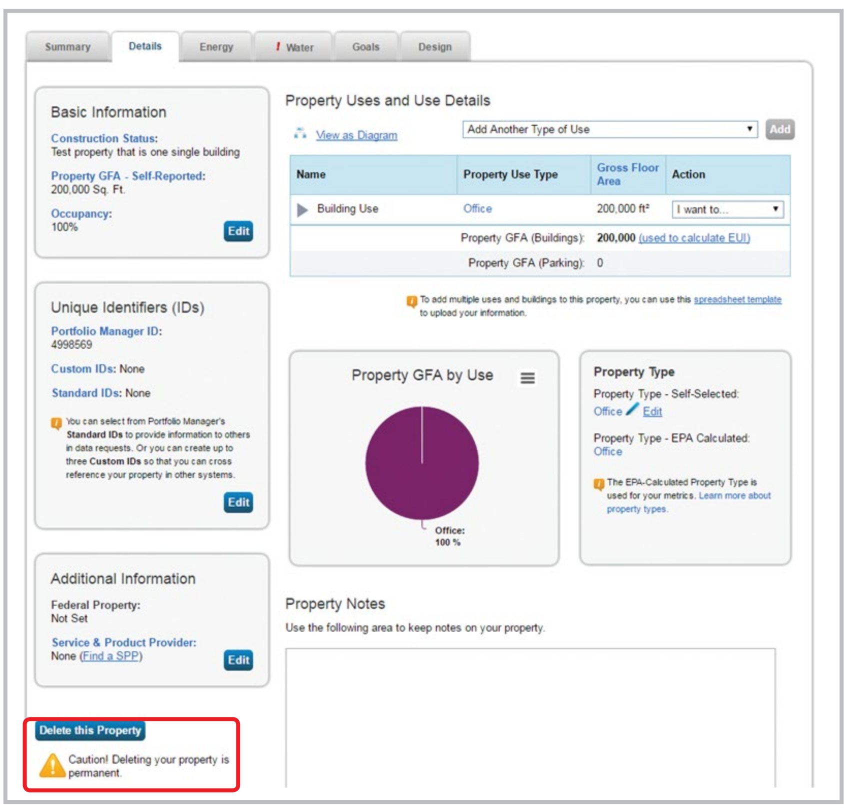
d. You will see a green notification message at the top of the screen once your response is submitted.

ADDITIONAL PORTFOLIO MANAGER GUIDANCE (NOT REQUIRED FOR COMPLIANCE)

Deleting a Property

In some instances, you might wish to delete a property from your account. Please note that deleting a property is PERMANENT and CANNOT BE UNDONE. Follow the instructions below to delete a property.

1. Click the **MYPORTFOLIO** tab.
2. Under the box with the list of properties in your account, click the name of the property you wish to delete.
3. Once you are taken to the **PROPERTY LEVEL** view of the property you wish to delete, click the **DETAILS** tab.
4. Scroll to the bottom of the page, where you will see the button **DELETE THIS PROPERTY** in the bottom left-hand corner of the screen.
   - Note the information bulletin that states deleting your property is permanent and cannot be undone.
5. If you are sure you want to delete your property, click the **DELETE THIS PROPERTY** button.
   - A pop-up will appear confirming your decision.
   - Please remember that **DELETING A PROPERTY IS PERMANENT AND CANNOT BE UNDONE**.
6. If you are sure you want to delete the property, click **CONTINUE**; otherwise, click **CANCEL**.
7. If you click **CONTINUE**, you will go back to the **MYPORTFOLIO** tab and should see a green notification box at the top of the screen saying that you have deleted the property you selected from your portfolio.



Generating Reports

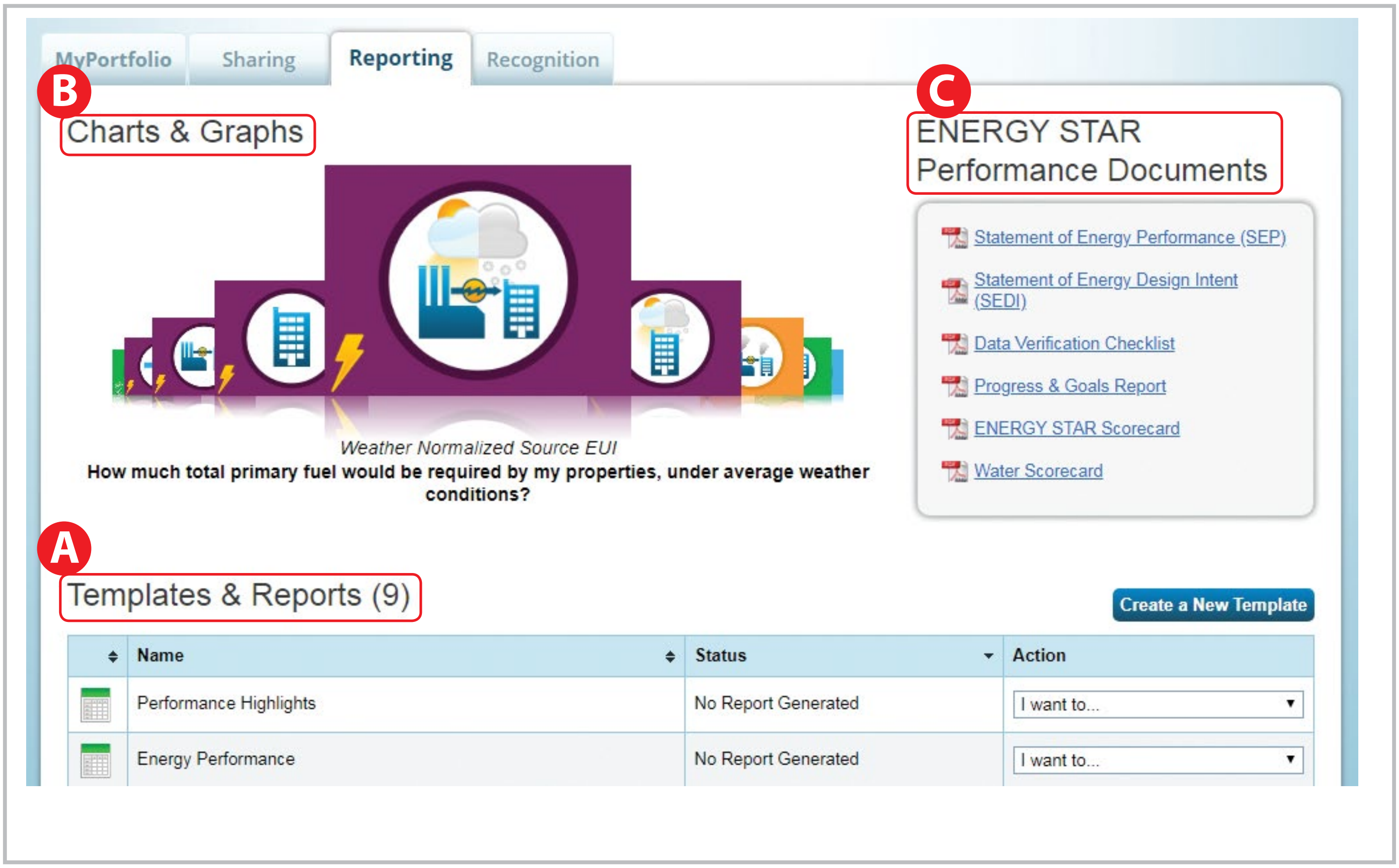
It is easy for you to see trends and to track improvement for your entire portfolio of buildings with a variety of standard graphs and reports in Portfolio Manager. Follow these steps to view reports about your properties and to assess progress. To get started, log in to Portfolio Manager at **portfoliomanager.energystar.gov**. Then, click the **REPORTING** tab to view graphs and reports for a property or portfolio.

There are three types of reports:

A. Standard reports using templates provided in your account.

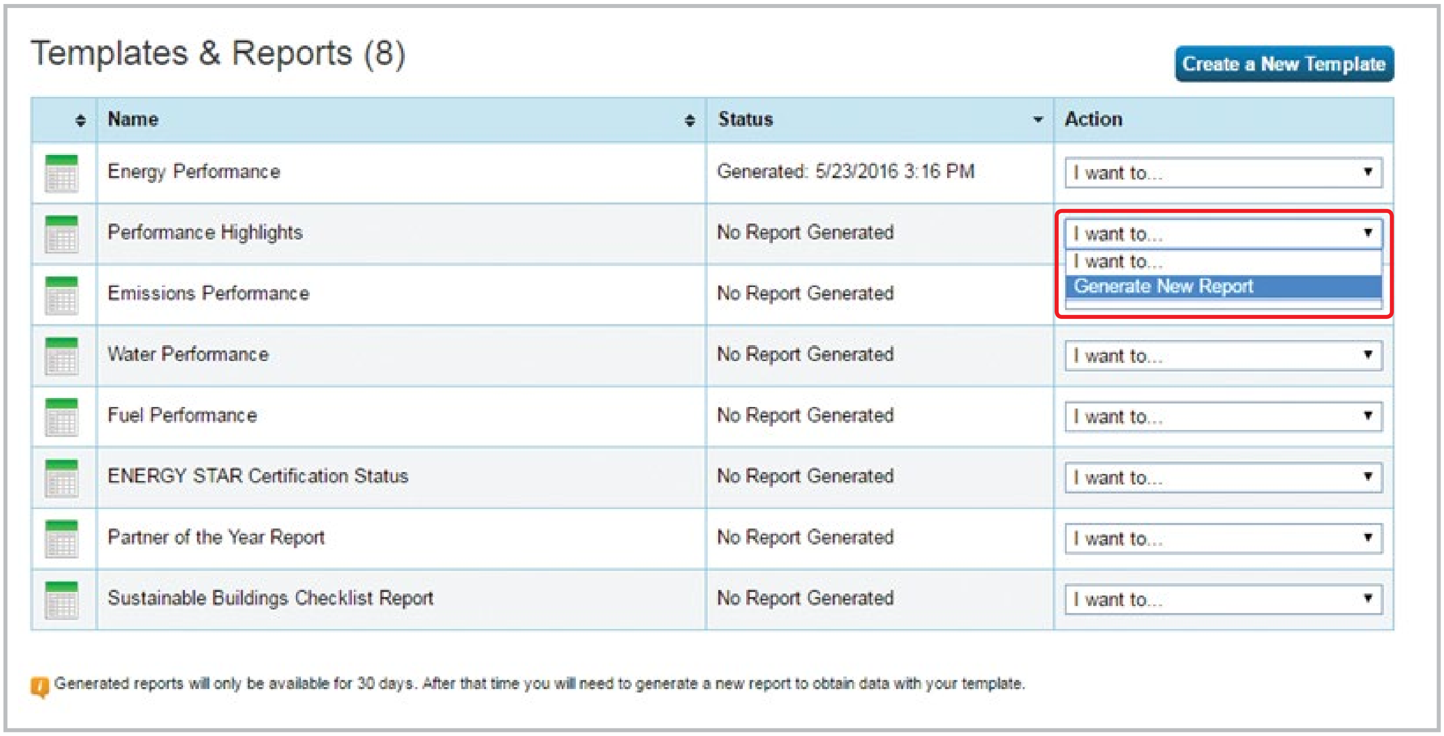
B. Quick charts and graphs for your portfolio (all your properties) that focus on site and source energy use intensity and ENERGY STAR score.

C. Five different ENERGY STAR performance documents.

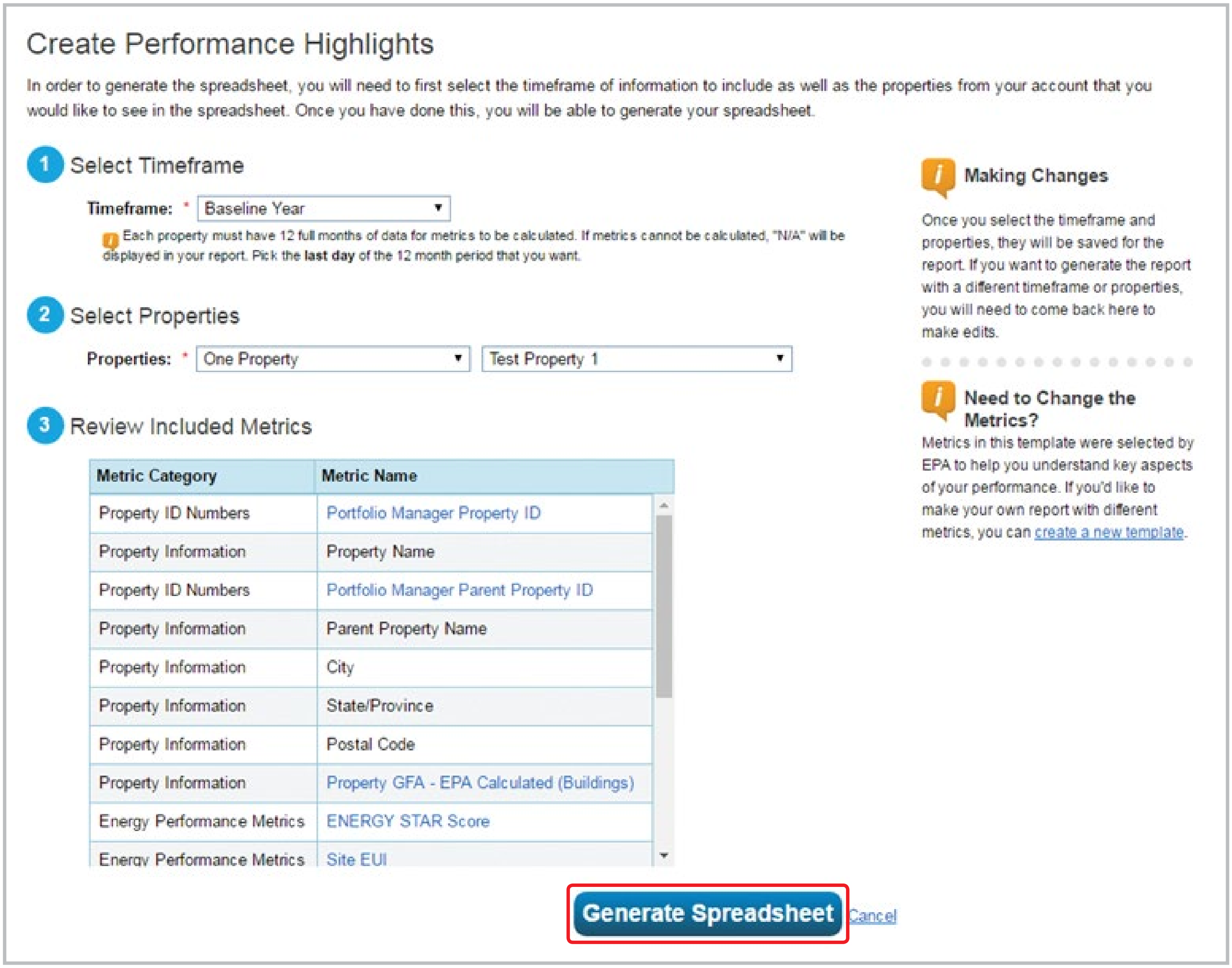


A) Generate Standard Reports Using Templates

1. Go to the action menu for the report and select "Generate a New Report."

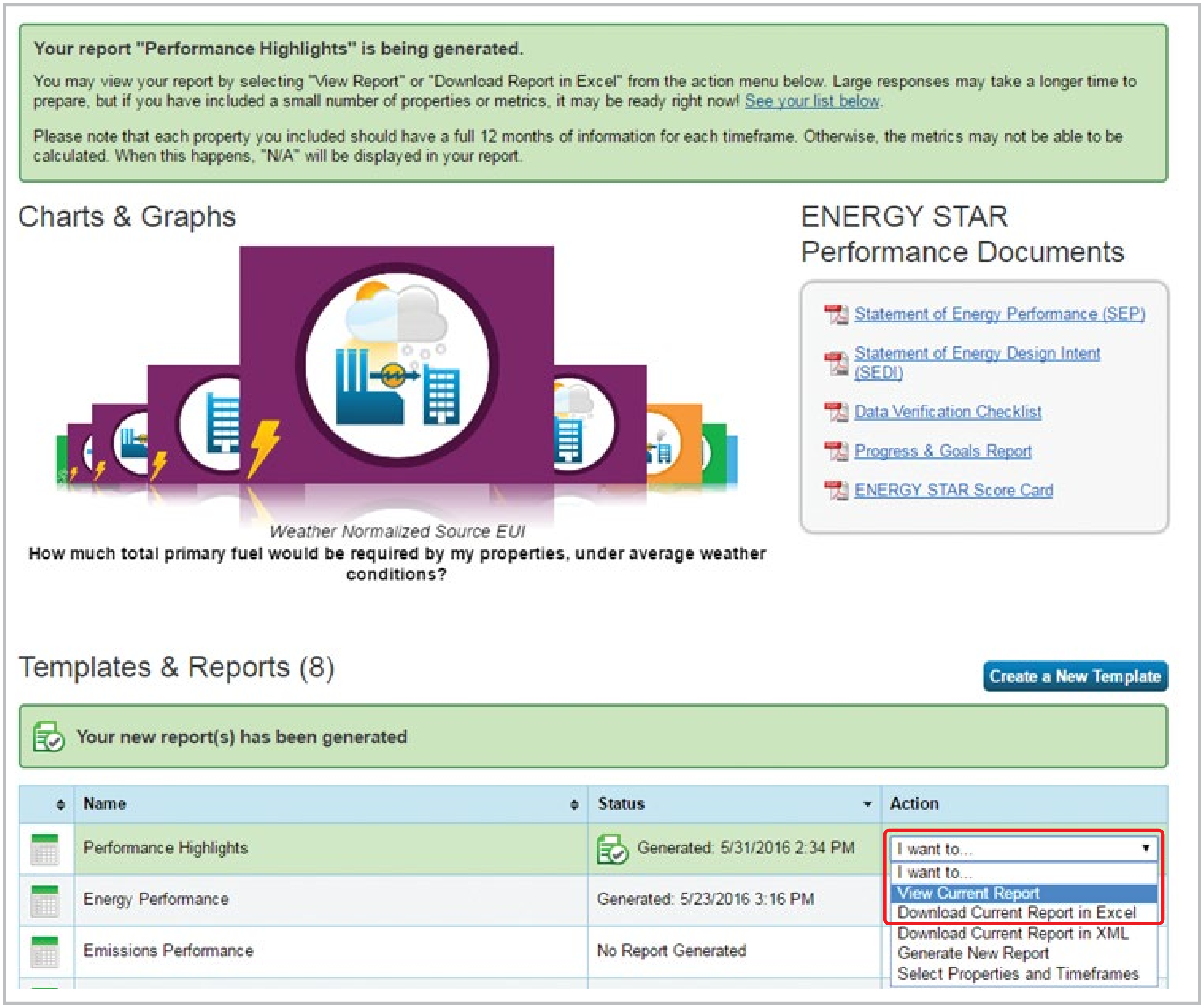


2. Select the time frame for your report.
   - You can choose a single year or you can compare two years.
3. Select the number of properties for the report.
   - Please note that if you don't have a full 12 months of data for the selected time frame, most metrics will not be calculated and will be displayed as "not available" in the report.
4. The list of metrics the EPA has preselected for the standard report is displayed at the bottom of this page. For an explanation of each metric, hover over its name.
   - You cannot change the metrics selected for standard reports.
5. Once you have made your selections, click **GENERATE SPREADSHEET**.
   - You will be taken back to the **REPORTING** tab and should see a notification message in a green box that saying your report is being generated.



6. Once your report is generated, you will see a notification in a green box in the second half of the screen that states, "Your new report(s) has been generated."
   - You will also see a new report listed in the table, highlighted in green.
   - The status column on this page indicates the date and time to report was most recently generated.
7. Click the drop-down box under the "Action" column.
   - From this menu, you can download the report in Excel or XML format.
   - If you want to change the time frame or selected properties, choose "select properties and time frames" and regenerate the report to refresh the report with new data.
   - If you update property use details, you must generate a new report using the action menu to see these changes in the report.

8. Choose "View Current Report" to review the information and metrics from the report, as well as download the report.



9. Click **CLOSE** to return to the **REPORTING** tab.

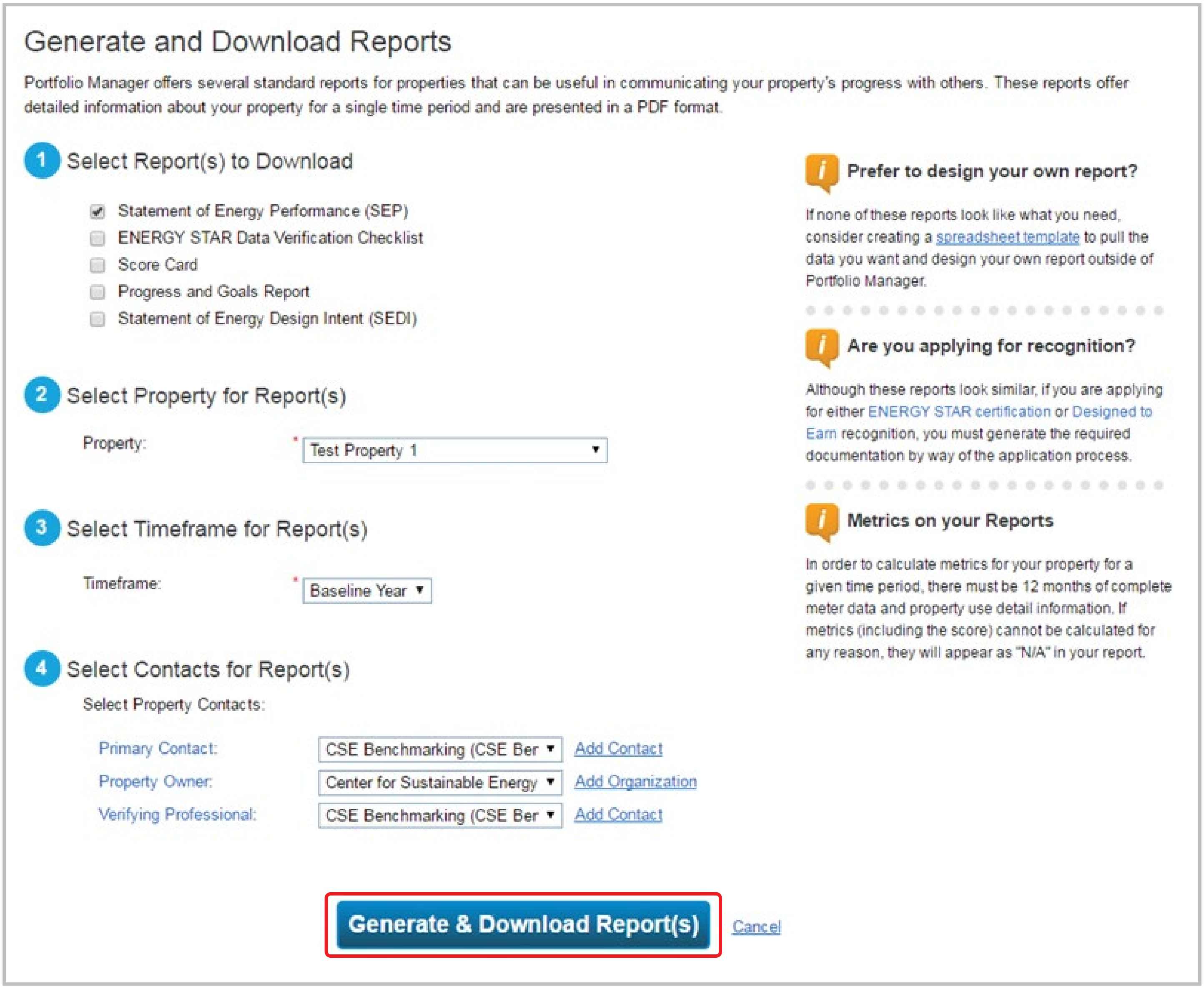
B) Generate Charts and Graphs

1. Click on a Charts and Graphs option on the upper-left corner of the **REPORTING** tab to see colorful graphs of how your portfolio (or group of properties) is performing.
   - This section allows you to see information about ENERGY STAR scores, as well as source and site energy use intensity, at the portfolio level.
   - Each charts and graphs page shows four figures. The top two figures show performance across your entire portfolio. The bottom two figures show baseline versus current performance broken down by group and by property type.
2. Individually print or download charts by clicking the appropriate icon in the upper-right corner of each figure.
3. Expand the table below the charts by clicking on any of the triangles. This table shows the raw data used to create the charts.
4. Navigate between charts by clicking on **NEXT REPORT** or **PREVIOUS REPORT**.
5. Click **CANCEL** in the lower right-hand corner to return to the **REPORTING** tab.


Weather Normalized Source EUI Report (As of 5/31/2016, 11:44:52 AM PDT)
Weather Normalized Source EUI is a measure of what your Source EUI would be under the normal conditions in your climate. Source EUI is a measure of the total energy required to operate your building (including energy losses from generation/transmission/distribution); therefore Weather Normalized Source EUI shows the total energy you would expect to use, if the weather conditions were the average (More...
Portfolio Average Weather Normalized Source EUI
-91.4
Change in Average Weather Normalized Source EUI
143.7
Current Average Weather Normalized Source EUI
235.1
Baseline Average Weather Normalized Source EUI
Properties Included: 3
Your Properties Compared to the National Median So
Print chart
Download PNG image
Download JPEG image
Download PDF document
Download SVG vector image
Above the Median
Weather Normalized Source EUI by Group
Select Groups
300
0
Weather Normalized Source EUI (kBtu/ft²)
All Properties
Baseline Weather Normalized Source EUI
Current Weather Normalized Source EUI
Weather Normalized Source EUI by Property Type
Select Types
400
0
All Properties
Office
Transportation ...
Baseline Weather Normalized Source EUI
Current Weather Normalized Source EUI
< Previous Report
Next Report >
Cancel
Raw Data for these Charts & Graphs
Weather Normalized Source EUI Averages by Group
Weather Normalized Source EUI Averages by Property Type
Weather Normalized Source EUI Averages by State/Province
Complete Reference Table

C) Generate ENERGY STAR Performance Documents

1. To download an ENERGY STAR performance document, click on the name of the report you wish to download.
2. Select one or multiple reports for download.
3. Choose properties and time frames.
    - You can generate a report for the current year, the baseline year or any year in between.
4. If contact names are required for the selected reports, you will be prompted to select names from drop-down menus on this page.
    - If you do not see the contact or organization you want, you can add them using the hyperlinks.
5. Once you entered the necessary information, click **GENERATE AND DOWNLOAD REPORTS**.
6. Save any generated reports to your computer as they are ***not*** saved in Portfolio Manager.
    - You also can regenerate the performance documents later.



Generate and Download Reports

Portfolio Manager offers several standard reports for properties that can be useful in communicating your property's progress with others. These reports offer detailed information about your property for a single time period and are presented in a PDF format.

1 Select Report(s) to Download

- [x] Statement of Energy Performance (SEP)
- [ ] ENERGY STAR Data Verification Checklist
- [ ] Score Card
- [ ] Progress and Goals Report
- [ ] Statement of Energy Design Intent (SEDI)

2 Select Property for Report(s)

Property: * Test Property 1

3 Select Timeframe for Report(s)

Timeframe: * Baseline Year

4 Select Contacts for Report(s)

Select Property Contacts:

Primary Contact:	CSE Benchmarking (CSE Ber	Add Contact
Property Owner:	Center for Sustainable Energy	Add Organization
Verifying Professional:	CSE Benchmarking (CSE Ber	Add Contact

Generate & Download Report(s) Cancel

Prefer to design your own report?

If none of these reports look like what you need, consider creating a spreadsheet template to pull the data you want and design your own report outside of Portfolio Manager.

Are you applying for recognition?

Although these reports look similar, if you are applying for either ENERGY STAR certification or Designed to Earn recognition, you must generate the required documentation by way of the application process.

Metrics on your Reports

In order to calculate metrics for your property for a given time period, there must be 12 months of complete meter data and property use detail information. If metrics (including the score) cannot be calculated for any reason, they will appear as "N/A" in your report.

Applying for ENERGY STAR Certification

Eligibility Requirements

To be eligible for certification, a property must:

1. Be located in the United States, U.S. territories or owned by the U.S. government.
2. Meet the definition of one of the eligible property types.

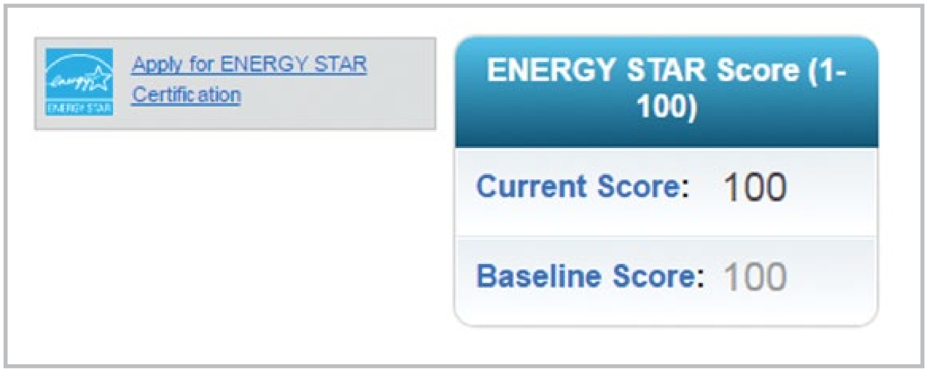
   Bank Branch
   Courthouse
   Data Center
   Distribution Center
   Financial Office
   Hospital
   (General Medical & Surgical)
   Hotel
   K-12 School
   Multifamily Housing
   Non-Refrigerated Warehouse
   Office
   Refrigerated Warehouse
   Retail Store
   Senior Care Community
   Supermarket/Grocery Store
   Wholesale Club/Supercenter
   Worship Facility

3. Receive an ENERGY STAR score of 75 or higher that reflects:
   - the whole property
     (or campus for Hospitals, Hotels, K-12 Schools or Senior Care)
   - all energy use on the entire property for 12 months
   - accurate property use details
     (with vacancy accounted for in Offices and Medical Offices, when appropriate)

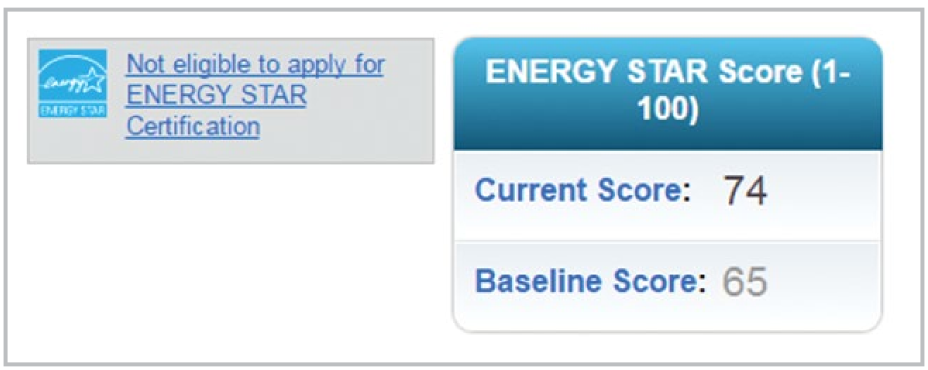
Application Process

1. Benchmark your property in Portfolio Manager and achieve an ENERGY STAR score of 75 or higher.
   - The score is calculated based on the information entered into Portfolio Manager, which includes 12 months of energy data for all fuel types and the operational characteristics in effect during this time.
2. Begin the online application in Portfolio Manager by navigating to the property name on the **MYPORTFOLIO** tab. From the property summary page, on the top, to the left of the ENERGY STAR score, you should see a box with the ENERGY STAR logo.

- If your building is eligible for certification, the lnk will say, “Apply for ENERGY STAR Certification,” and clicking the link will take you to the online application.



- If your property is not eligible for certification, it will say, “Not eligible to apply for ENERGY STAR Certification,” and clicking the link will provide further explanation as to why your property is ineligible.



3. Have a licensed professional (LP) conduct a site visit, verifying the information in your application.
    - For ENERGY STAR purposes, an LP is either a professional engineer or registered architect.
    - The LP can be a third party that you have hired – or they can be part of your organization.
    - While there is no cost associated with applying for ENERGY STAR certification, using a hired licensed professional to verify your information will have associated costs.
4. Complete the online application in Portfolio Manager, upload a scanned copy of the signed application and submit the application electronically to EPA.
5. Respond to questions from EPA, if necessary.
6. Receive notification of the application’s status.
    - It typically takes about three weeks to review and process an application, barring significant issues.
    - Once the application is approved, the applicant should receive a letter of congratulations, certificate and decals in two to three weeks.
        - The year listed on the ENERGY STAR certification is based on the year in which the application was approved.

ADDITIONAL RESOURCES

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

Energy Star Portfolio Manager Resources

A host of resources are provided by the EPA to help you benchmark your property using ENERGY STAR Portfolio Manager. Visit **https://portfoliomanager.energystar.gov/pm/help** to access resources like frequently asked questions and trainings or to submit technical questions or comments regarding Portfolio Manager. If you have a specific benchmarking program or data request question, please email one of the contacts listed.

City of San Diego Benchmarking Resources

Visit **SanDiego.gov/benchmark** to access additional training resources.

- Building Energy Benchmarking Fact Sheet
- Step-by-Step Benchmarking Training Videos
- SDG&E Data Request User Guide
- Frequently Asked Questions
- Upcoming Benchmarking Workshops

Email **energybenchmarking@sandiego.gov** with any specific City of San Diego benchmarking ordinance questions.

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 **www.energy.ca.gov/benchmarking**.

Email **benchmarking@energy.ca.gov** with any specific statewide benchmarking program questions.

Benchmarking Coach One-on-One Technical Support

San Diego Regional Green Business Network members can receive no-cost, one-on-one technical support through its **Benchmarking Coach** program. Not a member? Join at no-cost today at **GreenBizSD.org/join**.

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**.

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@semprautilities.com** to troubleshoot any data request portal or authorization issues.

Center for Sustainable Energy™

One simple mission — DECARBONIZE.

The Center for Sustainable Energy® (CSE) is a nonprofit offering clean energy program administration and technical advisory services. With the experience and streamlined efficiency of a for-profit operation, CSE leads with the passion and heart of a nonprofit. We work nationwide with energy policymakers, regulators, public agencies, businesses and others as an expert implementation partner and trusted resource.

EnergyCenter.org