



Environmental Services

San José Energy and Water Building Performance Ordinance (BPO) Compliance Checklist and Instructions

Please submit your annual benchmarking report to the City of San José by **May 1**. The benchmarking process consists of 6 steps:

- Step 1:** Create a property profile in ENERGY STAR Portfolio Manager®
- Step 2:** Gather and input energy use data
- Step 3:** Gather and input water data
- Step 4:** Identify your Building ID Number(s)
- Step 5:** Confirm your data is complete and accurate
- Step 6:** Send benchmarking report electronically to the City of San José

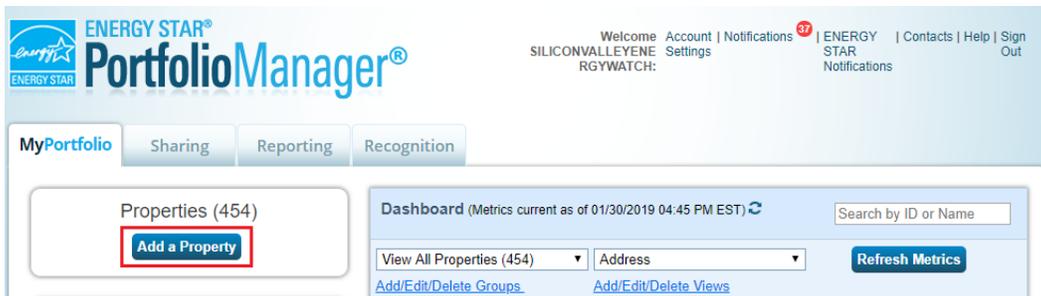
Please allow adequate time for each of these steps. The compliance process may take as little as one sitting, but can often require more time to find property details, enter data, allow for utility data authorizations, etc. If you need benchmark in multiple sessions, you can save your work in ENERGY STAR Portfolio Manager.

As the process can vary from case to case, please reach out if you have any questions specific to your property:

- Visit www.sanjoseca.gov/benchmarking
- Email: benchmarking@sanjoseca.gov
- Phone: (408) 975-2540

Step 1: Create a property profile in ENERGY STAR Portfolio Manager®

- 1) Create an account in ENERGY STAR Portfolio Manager:
 - a) Go to the ENERGY STAR Portfolio Manager login page (www.energystar.gov/portfoliomanager) and click **Register Now**.
 - b) Fill out the required information (username, password, job title, organization, etc.) and click **Create My Account**. Your username cannot be changed once an account has been created.
 - c) You will receive an email from Portfolio Manager shortly after creating your account; click on the URL in that email to activate your account.
 - d) Once you have created and activated your account, you can create a profile for your building by clicking **Add a Property** under the **My Portfolio** tab.



- e) Enter the required property information (property type, number of buildings, construction status). Then click **Get Started**.
 - f) Enter the basic property information (property name, address, gross floor area, etc.) and building use information (weekly operating hours, workers on main shift, etc.). For buildings with multiple uses, click **Add Another Type of Use**.
 - g) To finalize your entries, click **Add Property**.
 - h) Add or edit property details at any time by returning to the property **Details** tab.
- 2) For properties with more than one building, you will need to create a parent property, and then add the child building(s) to your parent property.
 - a) To create a **Parent Property**, click **Add a Property** under the **My Portfolio** tab.
 - b) Enter the required property information. Make sure to select **More than One**, under the **Your Property's Buildings** section, and then include how many buildings are on your property. Then click **Get Started**.

Your Property's Buildings

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

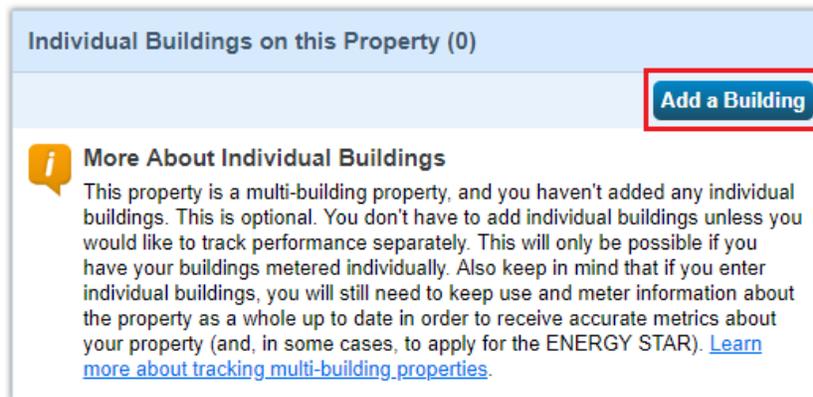
None: My property is part of a building

One: My property is a single building

More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?

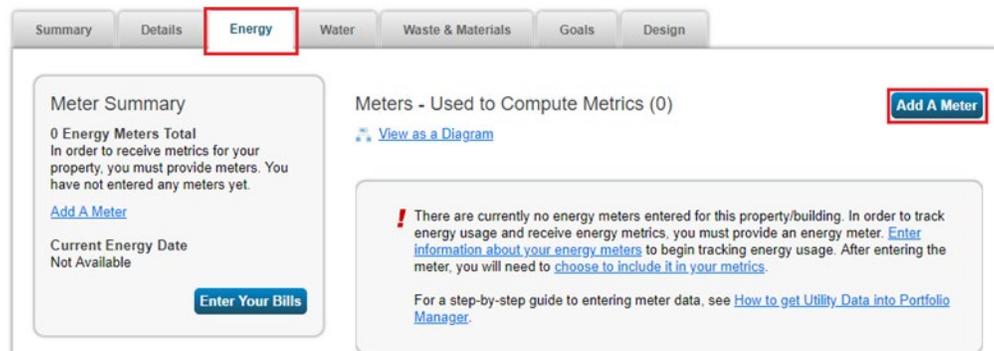
- c) Enter the basic property information and building use information. For buildings with multiple uses, click **Add Another Type of Use**.
- d) To finalize your entries, click **Add Property**.
- e) Next step is to add a **Child Property**. To do this, create a second property by following steps 2a-2d. Repeat this step for all additional properties you would like to tie to the Parent Property.
- f) Once the child property(ies) has been created, return to the **MyPortfolio** tab, and click on the Parent Property. Under Parent Property's Summary tab, scroll down and click **Add a building**.



- g) Under **Add Existing Buildings**, click **Select Buildings**, and select the child property(ies) you'd like to add. Then, click **Apply Selection**.
- h) Finally, click **Add Buildings**.

Step 2: Gather and input energy use data

- 1) Create Energy Meter(s)
- 2) To add a meter, click on the property's **Energy Tab**, and click **Add A Meter**.



- 3) Indicate the type(s) of energy you wish to track and then click **Get Started**. Please note that the BPO will require you to benchmark all types of energy consumed on your property and what is generated on-site (e.g. solar).
- 4) Click on each meter in the table and fill in the required information. When you are finished, click **Create Meters**.
- 5) To ensure accurate analysis, there must be at least **12** full consecutive calendar months of whole building energy use data for all active meters and all fuel types. There are two ways to get this data:

Option 1: Compile energy data directly from utility bills and enter it manually to Portfolio Manager. This option is best for building owners who are also the account holder for all meters in the building, and there are not multiple energy and gas meters.

Once you have gathered 12 months of whole building energy use data, upload that data into ENERGY STAR Portfolio Manager through one of the two following options:

- a. Enter energy use data manually.
 - i. Select **Click to Add an entry**. Enter the billing **Start Date**, **End Date**, and **Usage** for each month.

▼ Electric Grid Meter

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
Click to add an entry								

[Delete Selected Entries](#)
[Add Another Entry](#)
[Learn how to copy/paste](#)

- ii. Repeat for all meters and energy sources and click **Finish Meter Set Up** to save the information.
- b. OR, enter multiple rows of meter information at once by uploading via spreadsheet.
 - i. Click on the **Spreadsheet Template** hyperlink to download a standard template. Enter data from all bills into the template.

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>		

[Delete Selected Entries](#)
[Add Another Entry](#)
[Learn how to copy/paste](#)

Upload data in bulk for this meter:

 You can use the single-meter spreadsheet to either: "Upload" the file below, or copy and paste the data from the spreadsheet into the table above ([instructions in this FAQ](#)). Use this single-meter [spreadsheet template](#).

No file chosen

- ii. Save the file onto your computer.
- iii. Go back to the meter setup page on Portfolio Manager, click **Choose file**, and select the file you just created.
- iv. Click **Upload**. Repeat for all meters and energy sources, then click **Continue** to save.
- v. Select which meters to be included in your metrics. Most meters should be included unless they are sub metered.
- vi. Finally, select whether the meter(s) entered account for total or partial energy consumption for your property, then click **Apply Selections**.

Option 2: If you do not have your monthly data on hand, you can request whole building energy use data directly from PG&E. Start with this option if you are not the account holder for all the meters in the building. Follow PG&E’s detailed instructions at pge.com/benchmarking under the section “How to request energy usage data from the Building Benchmarking Portal.”

- a. If your building has less than three active utility accounts, none of which are residential, OR your building has less than five active utility accounts, where at least one account is residential, OR your building has fewer than a combination of five residential and commercial utility accounts, tenants must authorize the release of meter data.

To authorize the release of meter data, send tenants your **10-digit building ID**, the link to the **Portfolio Manager Web Services Data Authorization Form** and Authorization instructions at www.pge.com/benchmarking , under the section “How to authorize release of meter data.” Note that PG&E will generate your 10-digit building ID through the authorization process.

If the building owner **has not** obtained permission to release meter data from tenants, within 14 days of receiving a data request, PG&E shall send each customer who has not already granted permission a request for permission to share the customer’s energy use data with the building owner. If a tenant has not provided an affirmative response within 30 days of PG&E’s request, building owners will be notified that energy use data will not be provided because tenant authorizations were not obtained.

We recognize that properties are not always able to obtain this data from tenants. In these cases, we recommend that you **estimate** the data so you can still benchmark. Unfortunately, you will not be eligible for an ENERGY STAR certification. You may also submit your benchmarking report without usage data, which will be accepted in these cases without penalty. In the **Property Notes**

section under the **Details** Tab, please include “Unable to obtain tenant meter data.” In addition, please email benchmarking@sanjoseca.gov to inform us you were not able to obtain authorization from tenants.

- b. If your building has 3 or more active utility accounts, none of which are residential, OR your building has 5 or more active utility accounts, where at least one account is residential, OR your building has a combination of 5 or more residential and commercial utility accounts, tenants do NOT need to authorize the release of meter data. Enroll in PG&E’s Web Services to have energy usage automatically uploaded. This option may be better for property owners or managers who have a larger portfolio or multiple tenants.
 - i. Connect with PG&E by selecting **Contacts, Add Contact**, and searching for “**Pacific Gas and Electric**” in the **Name** field, and clicking **Connect**.



- ii. Enter the name and email of the individual authorizing the connection, and then click **Send Connection Request**. It typically takes less than 24 hours for PG&E to accept your request.
- iii. After you have received the notification that PG&E has accepted your connection request, share your property(ies) with PG&E’s Portfolio Manager account.
- iv. Go to the **Sharing** tab, click **Share a Property**.



- vii. Select **Properties to Share**, and choose the buildings you would like to share with PG&E. Next, select PG&E as the **Account** you'd like to share, and then click **Continue**.
- viii. Select **Exchange Data** as the permission level to grant PG&E.
- ix. Enter the name of the Property Owner.
- x. In the ID Type field, enter an **S** if you will be providing the **Service Agreement ID Number**. Enter an **M** if you will be providing the **Meter Number**.
- xi. Scroll down and click **Apply Selections & Authorize Connection**.
- xii. Finally, click **Share Property(ies)**. Your request should be processed within 1-2 business days.
- xiii. Once the property has been shared with PG&E, each customer must submit a "**Portfolio Manager Web Services Data Authorization**" form to PG&E. Links to this form will be included in the confirmation email from PG&E.

Step 3: Gather and input water data

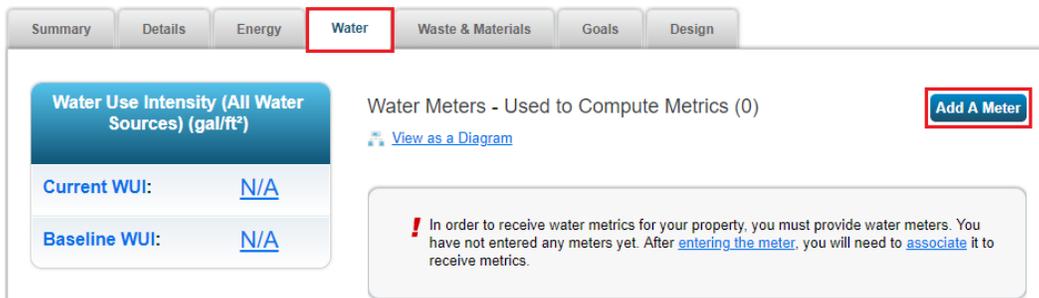
Unlike energy usage data, water usage data must be entered manually. If you do not have your water usage data on hand, you may request it by contacting your water provider directly.

Water Providers

San Jose Water Company	customer.service@sjwater.com 408-279-7900
San Jose Municipal Water	408-535-3500
Great Oaks Water Company	customerservice@greatoakswater.com 408-227-9540

1) Create Water Meter(s)

- a) Click on the property's **Water** tab, and on the next screen, select **Add A Meter**.



- b) Select your property's water source (Municipally Supplied Potable Water, Municipally Supplied Reclaimed Water, Well Water, and/or Other) and click **Get Started**.
- c) Check off each meter in the table and fill in **Units**, **Date Meter became Active**, and if the meter is still **In Use**. When you are finished, click **Create Meters**.

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive
<input checked="" type="checkbox"/>	Potable Indoor Meter	Potable Indoor				<input checked="" type="checkbox"/>	

[✖ Delete Selected Entries](#)
[+ Add Another Entry](#)

2) Enter water use data through two options:

Option 1: Enter water use manually

▼ Potable Indoor Meter

Start Date	End Date	Usage Gallons	Total Cost (\$)	Estimation
Click to add an entry				

[✖ Delete Selected Entries](#)
[+ Add Another Entry](#)
[📄 Learn how to copy/paste](#)

- a) To add consumption data manually, select **Click to Add an entry**. Enter the billing **Start Date**, **End Date**, and **Usage** for each month.
- b) Repeat for all meters and water sources, then click **Continue** to save the information.
- c) Select which meters to be included in your metrics. Most meters should be included unless they are sub metered.
- d) Finally, select whether the meter(s) entered account for total or partial water consumption for your property, then click **Apply Selections**.

Option 2: Enter water use using the Spreadsheet Template

- a) Like energy, to enter multiple rows of meter information at once, click on the **Spreadsheet Template** hyperlink to download a standard template. Enter data from all bills into the template.

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>		

[✖ Delete Selected Entries](#)
[+ Add Another Entry](#)
[📄 Learn how to copy/paste](#)

Upload data in bulk for this meter:

 You can use the single-meter spreadsheet to either: "Upload" the file below, or copy and paste the data from the spreadsheet into the table above ([instructions in this FAQ](#)). Use this single-meter [spreadsheet template](#).

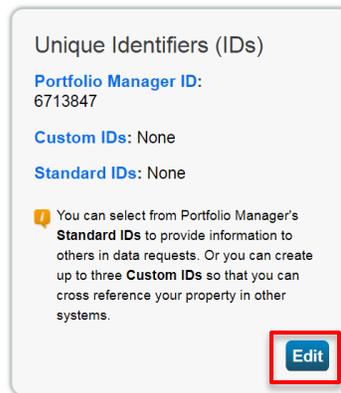
No file chosen

- b) Save the file onto your computer
- c) Go back to the meter setup page on Portfolio Manager, click **Choose file**, and select the file you just created
- d) Click **Upload**. Repeat for all meters and energy sources and click **Continue** to save.

Step 4: Identify your Building ID Number(s)

Each building has been assigned a building ID, which you will use for reporting. This will allow the City to keep track of your building's compliance over time. Find your building address(es) and corresponding building ID at the [Covered Buildings List PDF online](#).

- 1) To add your Unique Building Identification (UBID) to your building profile, go to the **Details** tab for your building and click **Edit** in the **Unique Identifiers** box on the left-hand side.



Unique Identifiers (IDs)

Portfolio Manager ID:
6713847

Custom IDs: None

Standard IDs: None

 You can select from Portfolio Manager's **Standard IDs** to provide information to others in data requests. Or you can create up to three **Custom IDs** so that you can cross reference your property in other systems.

Edit

- 2) In the next **Property Identifiers** page, select San Jose Building ID from the **Standard IDs dropdown**, select Building ID, and enter your ID in the field. Click save.

Step 5: Confirm your data is complete and accurate

Building owners are required to submit accurate and complete benchmark reports to be in compliance. Benchmarks submitted with errors may inaccurately represent your buildings energy and water use and may not be approved.

1) Check for possible data errors

- a) Click on the properties **Summary** tab and select **Check for Possible Errors**.

The screenshot shows the 'Summary' tab selected in the Portfolio Manager interface. The 'Metrics Summary' table is as follows:

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO2e/ft²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

- b) Select the previous calendar year ending in December 31 and click **Run Checker**.
 c) If there is an error, an alert icon will appear in the field that contains the error.
 d) Review the list of alerts (if any) and follow Portfolio Manager's suggestions to address the issue(s).

Data Quality Checker for [Sample Property](#)

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your year of interest, review your alerts, and follow the links to view or correct your data as needed.

Select Timeframe & Run Checker

We check data for a full year (12 months) of meter consumption and Property Use Details (called a **Metric Year**). Select a **Year Ending Date** and click "run checker" to see possible data issues.

Year Ending:

Alert: There is not 12 full months of meter data.

Problem: The following meters do not have 12 full calendar months of meter entries for the year selected (01/01/2017 - 12/31/2017).

- Reclaimed Outdoor Meter (missing bills for 01/01/2017 - 01/01/2018)
- Potable Indoor Meter (missing bills for 01/01/2017 - 01/01/2018)

What to do:

- If you think this is a mistake, click the links above to review the entries for each meter and make corrections if necessary.

About Timeframes

The Data Quality Checker needs one full calendar year of **Property Use Details** and **meter** information for most checks. Otherwise, we will show you basic alerts to let you know what's missing.

About Alerts

- Indicates data is incomplete or missing. Most likely at least some metrics are not able to be calculated as a result. Issue should be resolved as soon as possible.
- Indicates data is atypical for the type of property and its associated use. Data should be checked for errors to ensure metrics are correct for the property.

- e) Check other fields and verify the information entered is correct.
- f) Once you have made all applicable changes, run the data checker again to ensure that all alerts have been addressed.

If there is any additional property information you wish to be made publicly available—for instance, to provide context for extremely high Energy Use Intensity—please enter the information into the **Property Notes** section on the property Details tab.

Step 6: Send Benchmarking Report to the City of San José

An annual Energy Benchmarking Report is required by the City of San José every year.

1) Generate Report

- a) Click the reporting link listed on sanjoseca.gov/benchmarking, which will take you to the Portfolio Manager website, and log into your account as prompted.
- b) In the resulting window, fill in the **About Your Response**, and **Your Response** box.
- c) Once you have filled in the required fields, click **Generate Response Preview**.

About Your Response

Who is this data being submitted on behalf of?

myself
 someone else

Your Response

Select Information to Include:

Timeframe: * for:

 If the data requestor has specified a timeframe for the request, you will not be able to change it.

Properties: *

 The data requestor may have asked for one or more [standard IDs](#) to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response.

[Cancel](#)

- 2) Send report to the City of San José
- a) Click the drop-down menu for your report and select **Send Response**.

What Would You Like To Do?

 I Want to Review/Edit these Properties
You can review individual properties/meters by using the links in the table above or [download it to Excel](#) in order to begin troubleshooting these issues.

 I Thought I Fixed These Problems- I Want to [Generate an Updated Response](#)
If you have made changes to your data since your response was generated (03/13/2019 01:20 PM EDT), you will need to re-generate the report in order for these changes to be reflected.

 I Want to Submit Anyway
If you have verified that any issues listed in the table above are not the result of a mistake, you can continue submitting your response. Note that an incomplete request could be considered invalid or non-compliant by the requestor so it is strongly encouraged that you fix any issue before proceeding.

[Generate Updated Response](#)

[Send Response](#)

(You will confirm your response on the next screen)

- b) On the following page, enter the necessary information, and click **E-Sign Response**.
- c) Once you see the green check mark, click **Send Data**, and then **Continue**.
You will receive a confirmation email from the City of San José once your benchmark has been approved.

If you have questions about the BPO, please contact us; we're here to help.

- Visit www.sanjoseca.gov/benchmarking
- Email: benchmarking@sanjoseca.gov
- Phone: (408) 975-2540

Thank you for completing your San José Energy and Water Building Benchmarking report!