

Builder Services Portal

User Guide



April 2022

Portal User Guide

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Logging In

Go to: <http://www.sdge.com/builder-portal>

Creating an Account

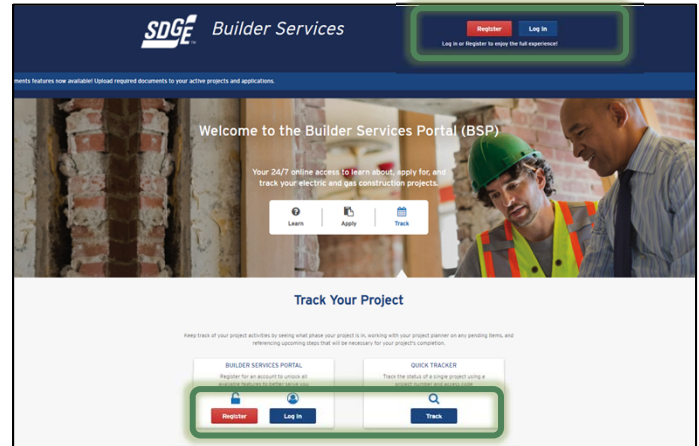
The Portal Landing Page

On the Builder Services home page, register for a new account or login to an existing account.

Using a login account will provide opportunity to:

- Submit new requests to automatically associate them with your account
- Create a dashboard to view progress on your projects.

Track a single project by entering the Project or Job number and Access Code.



***NOTE:** If you do not have your project number or access code, please reach out to your SDG&E Planner or Coordinator.

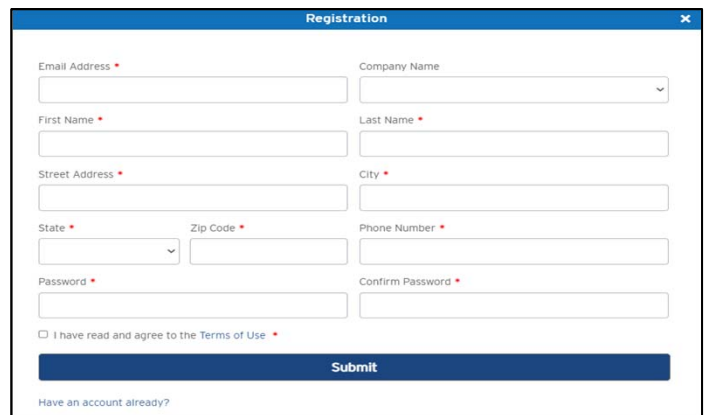
Register

Register for an Account

Click the “Register” button in the top right corner of the landing page and then enter your account information.

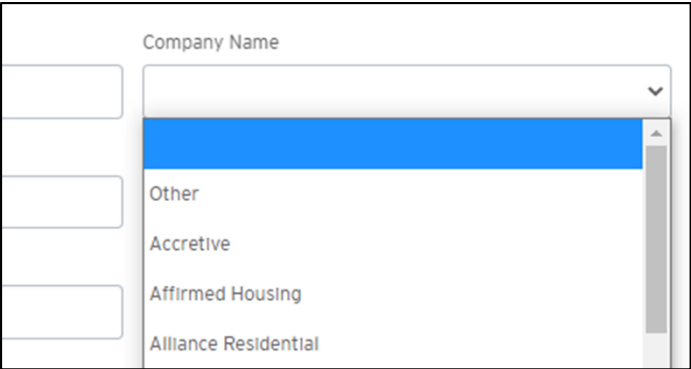


It is important to select an **e-mail address that you would like to use for the duration of your account**. Your e-mail address will become your username and will **not be able to be changed later**. (Should you need to change your e-mail later, you will need to create a new account).



Selecting Your Company

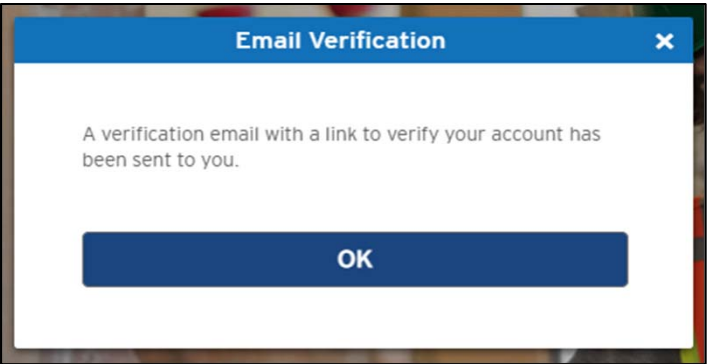
Select your company name from the dropdown list.
If your company is not listed, select Other. Selecting Other will prompt a secondary box for you to type in the name of your company.



A screenshot of a web form titled "Company Name". It features a dropdown menu with a blue highlight on the "Other" option. Below the dropdown, there are three empty text input boxes for providing company details.

Verify Your Account

Once you submit your account information, you will be sent an email verification.

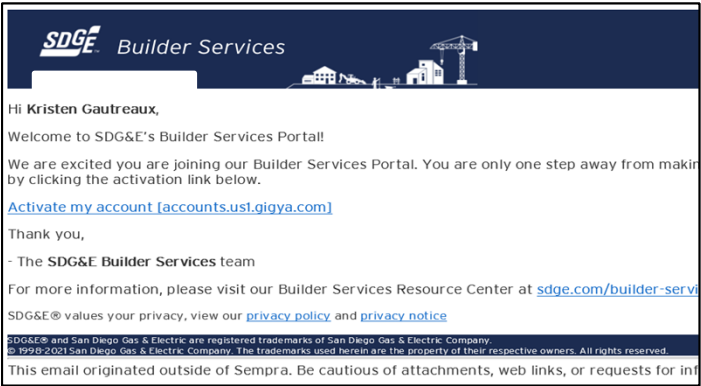


A screenshot of a blue "Email Verification" dialog box. The text inside says: "A verification email with a link to verify your account has been sent to you." At the bottom is a large blue button labeled "OK".

Once you receive the verification e-mail, click the link to activate your account.



You must validate your email to successfully create an account.



A screenshot of an email from SDG&E Builder Services. The header includes the SDG&E logo and the text "Builder Services". The body of the email is addressed to "Hi Kristen Gautreaux," and welcomes her to the Builder Services Portal. It includes a link to "Activate my account [accounts.ust.gigya.com]" and a thank you from the SDG&E Builder Services team. The footer contains legal disclaimers and a note about the email originating outside of Semptra.

Project Dashboard

Adding Projects to the Dashboard

When first accessing your account, the dashboard will be empty.

You will need to enter a Project or Job number and Access Code. You should have received your **project # and access code** from an SDG&E planner or coordinator.



Once the information is entered, click the **Add Project** button.



Search Type keywords, IDs, or a status to search

Projects

Project ID *	Project Name	Address

Applications

Application ID *	Project Name	Address	Submission Date	Status

[New Application](#)

Applications in the Dashboard

To submit a new service request, click **New Application**.

Applications submitted while logged in will automatically be reflected on your dashboard.

Any applications submitted while not logged in will not be visible in your logged in account and cannot be added to your dashboard.



Search Type keywords, IDs, or a status to search

[Add This Page](#)

My Projects

Project ID *	Project Name	Address	Creation Date	Status
300000256461	Hidden Valley Development	9555 GOLD COAST DR 12	09/26/2020	Gathering Info
300000256470	Main Street Panel Upgrade	2700 Zoo Dr	08/19/2020	Complete
300000256470	San Diego Museum	1000 Kettner Boulevard	12/10/2020	In Progress
300000256480	San Diego Sea World	1000 Sea World Dr	03/19/2021	Needs Attention
300000256480	San Diego Sea World	1000 Sea World Dr	03/23/2021	In Progress

Items per Page 5 10 20 50 100 200 500 1000

My Applications

Application ID *	Project Name	Address	Submission Date	Status
300000256461	Hidden Valley Development	9555 GOLD COAST DR 12	09/26/2020	Gathering Info
300000256470	Main Street Panel Upgrade	2700 Zoo Dr	08/19/2020	Complete Project ID 300000256470
300000256470	San Diego Museum	1000 Kettner Boulevard	12/10/2020	In Progress
300000256480	San Diego Sea World	1000 Sea World Dr	03/19/2021	In Progress

Items per Page 5 10 20 50 100 200 500 1000

[New Application](#)

Project Dashboard

Project Information

The Dashboard page will display the following for projects & applications:

- Project ID or Application ID
- Project name
- Address
- Creation or Submission date
- Status



My Projects

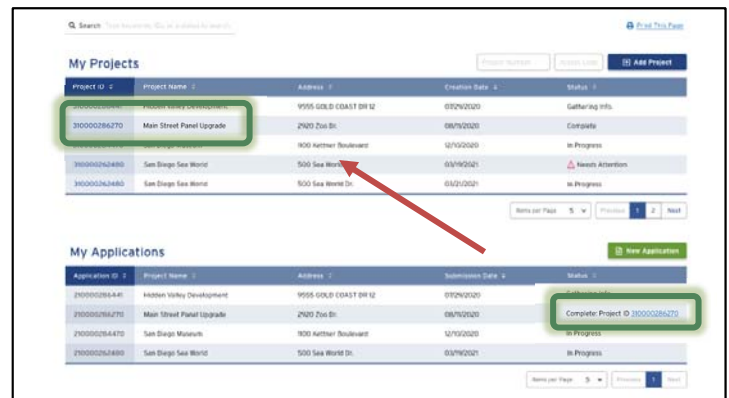
Project ID	Project Name	Address	Creation Date	Status
30000206446	Hidden Valley Development	9555 GOLF COUNTRY DR W	07/29/2020	Gathering Info
30000206470	Main Street Panel Upgrade	2740 Zee Dr	08/19/2020	Complete
30000206470	San Diego Museum	1000 Northmore Boulevard	12/10/2020	In Progress
30000206480	San Diego Sea World	500 Sea World Dr	03/16/2021	Needs Attention
30000206480	San Diego Sea World	500 Sea World Dr	03/16/2021	In Progress

My Applications

Application ID	Project Name	Address	Submission Date	Status
20000206446	Hidden Valley Development	9555 GOLF COUNTRY DR W	07/29/2020	Gathering Info
20000206470	Main Street Panel Upgrade	2740 Zee Dr	08/19/2020	Complete Project ID 30000206470
20000206470	San Diego Museum	1000 Northmore Boulevard	12/10/2020	In Progress
20000206480	San Diego Sea World	500 Sea World Dr	03/16/2021	In Progress

Applications becoming Projects

When applications are processed by SDG&E and become approved projects, the Status column under **Applications** will display the new Project ID 3X--. The project will also be listed under **Projects** with its new Project Number.



My Projects

Project ID	Project Name	Address	Creation Date	Status
30000206470	Main Street Panel Upgrade	2740 Zee Dr	08/19/2020	Complete
30000206480	San Diego Sea World	500 Sea World Dr	03/16/2021	Needs Attention
30000206480	San Diego Sea World	500 Sea World Dr	03/16/2021	In Progress

My Applications

Application ID	Project Name	Address	Submission Date	Status
20000206446	Hidden Valley Development	9555 GOLF COUNTRY DR W	07/29/2020	Gathering Info
20000206470	Main Street Panel Upgrade	2740 Zee Dr	08/19/2020	Complete Project ID 30000206470
20000206470	San Diego Museum	1000 Northmore Boulevard	12/10/2020	In Progress
20000206480	San Diego Sea World	500 Sea World Dr	03/16/2021	In Progress

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Project Summary Page

Project Tracking Information

The Project page will display the following:

- Project start date
- Primary customer & phone number
- Phase the job is in
- Status details

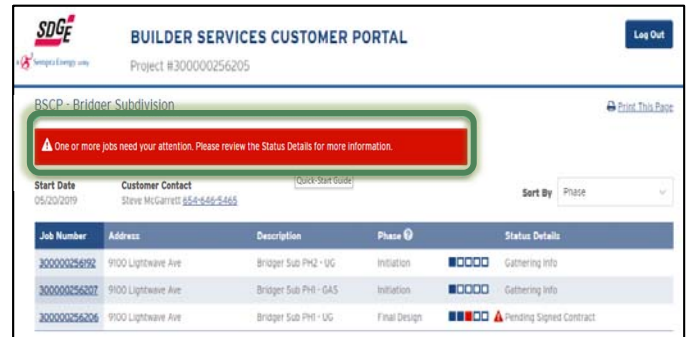


Alert messages will display if pending information is required from the customer.

When the job is energized, the phase column will say **Complete**.

Click the **Phase Question Mark (?)** to see details for each phase.

Review details for each job by clicking on the job number.



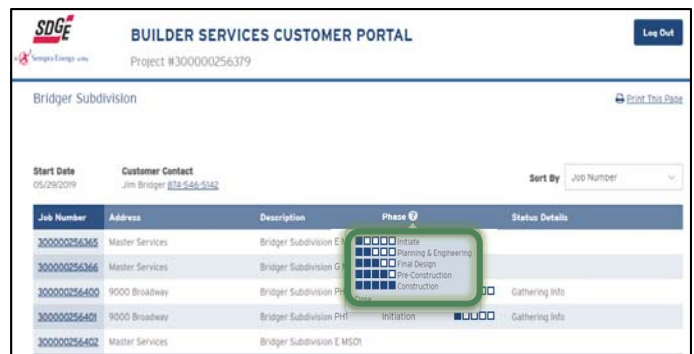
BUILDER SERVICES CUSTOMER PORTAL
Project #300000256205

BSCP - Bridger Subdivision

▲ One or more jobs need your attention. Please review the Status Details for more information.

Start Date: 05/02/2019 Customer Contact: Steve McGarrett 858-546-5165 Sort By: Phase

Job Number	Address	Description	Phase	Status Details
300000256202	9100 Lightware Ave	Bridger Sub PH2 - UG	Initiation	Gathering Info
300000256202	9100 Lightware Ave	Bridger Sub PH1 - GAS	Initiation	Gathering Info
300000256205	9100 Lightware Ave	Bridger Sub PH1 - UG	Final Design	Pending Signed Contract



BUILDER SERVICES CUSTOMER PORTAL
Project #300000256379

Bridger Subdivision

Start Date: 05/29/2019 Customer Contact: Jim Bridger 878-546-5162 Sort By: Job Number

Job Number	Address	Description	Phase	Status Details
300000256365	Master Services	Bridger Subdivision E	Initiate	
300000256366	Master Services	Bridger Subdivision G	Planning & Engineering	
300000256400	9000 Broadway	Bridger Subdivision P	Final Design	
300000256401	9000 Broadway	Bridger Subdivision PH1	Pre-Construction	Gathering Info
300000256402	Master Services	Bridger Subdivision E MS01	Construction	Gathering Info

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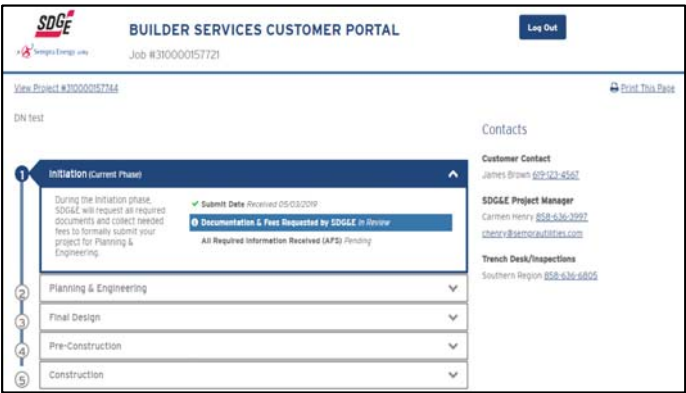


Job Details

Click on the job number to see the job's details.

Information contained on this page:

- Description of the current phase
- Information requested from SDG&E
- Status of each requirement

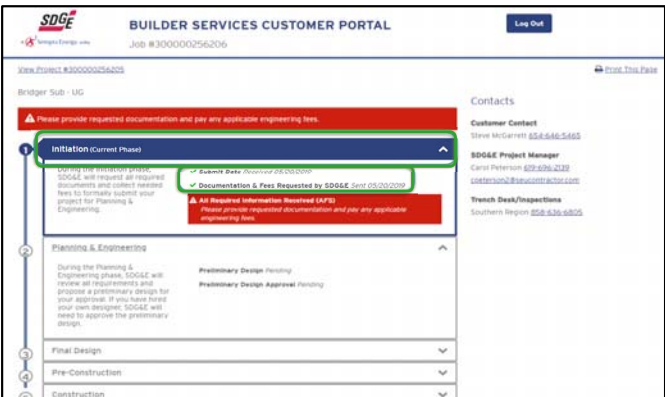


To view details and requirements for each phase, you can expand the arrow for the particular phase.

Green check marks indicate information has been received and completed by the customer and/or SDG&E.



A red alert will display information that is pending from the customer and/or SDG&E.



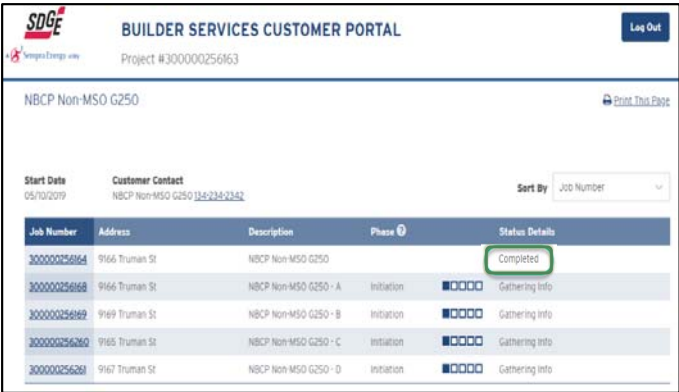
Job Completion

When the job is energized, phase boxes will not display and you'll see the word **Complete**.

Definition of **Complete**:

Distribution work – system energized
Master Service Orders – all meters have been set

Click on job notification number to collapse all phases.



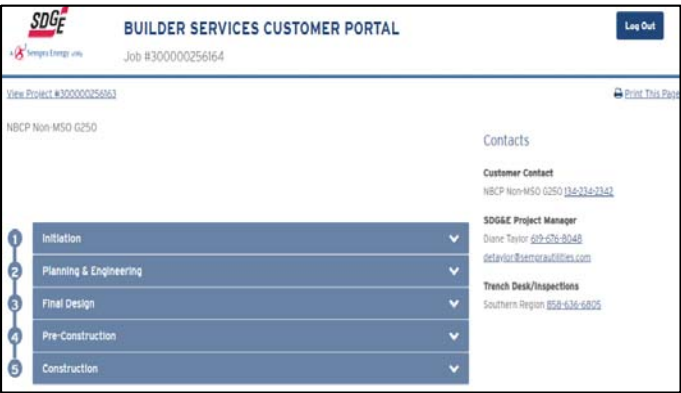
SDG&E Builder Services Portal

Portal User Guide

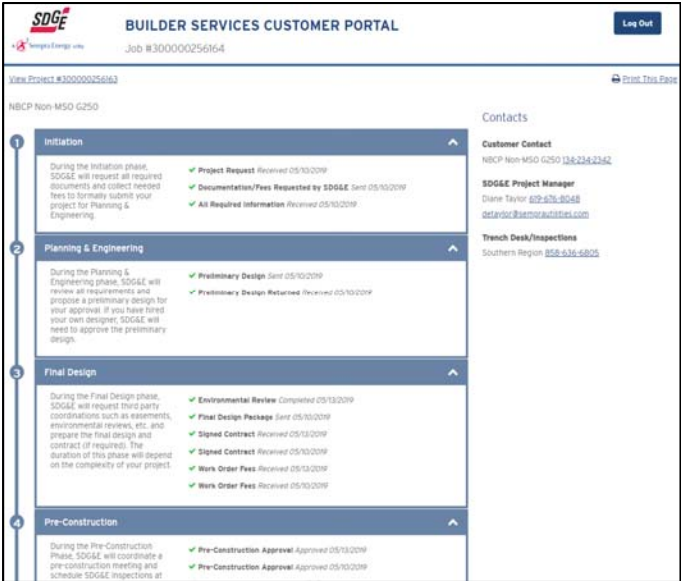


Job Completion

When the job is complete, all phases are collapsed.



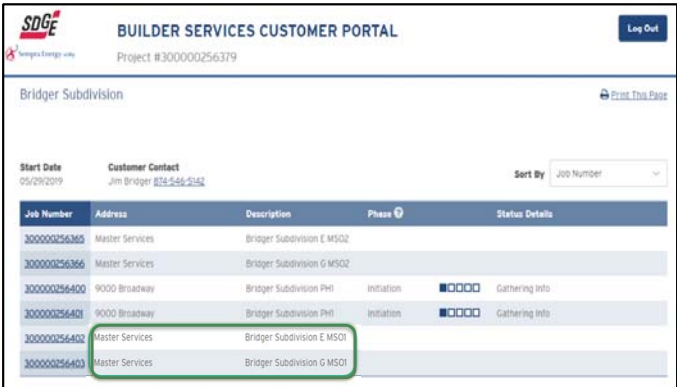
Click on any arrow to view completed requirements for each phase.



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Master Service Orders

Access information about your master service orders via the main page on the dashboard. If your project has both gas and electric, each will have their own job notification number.

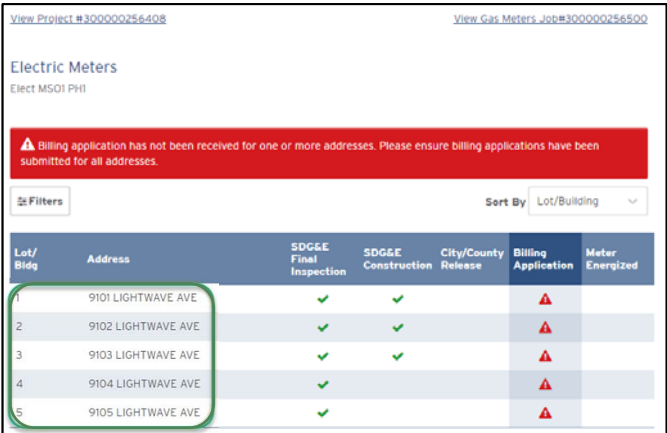


Job Number	Address	Description	Phase	Status Details
300000256365	Master Services	Bridger Subdivision E M502		
300000256366	Master Services	Bridger Subdivision G M502		
300000256400	9000 Broadway	Bridger Subdivision PH1	Initiation	Gathering Info
300000256401	9000 Broadway	Bridger Subdivision PH1	Initiation	Gathering Info
300000256402	Master Services	Bridger Subdivision E M501		
300000256403	Master Services	Bridger Subdivision G M501		

Subdivision Jobs Details

Each address on the order will be listed. You can see which requirements have been met and which are pending.

Address for Subdivisions will display each lot with the address.



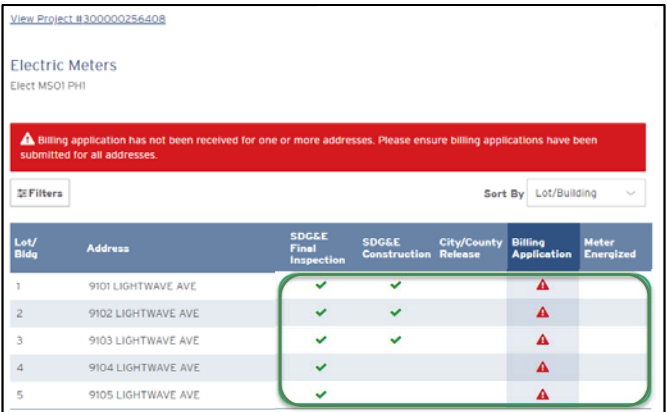
Electric Meters
Elect M501 PH1

Billing application has not been received for one or more addresses. Please ensure billing applications have been submitted for all addresses.

Lot/Bldg	Address	SDG&E Final Inspection	SDG&E Construction	City/County Release	Billing Application	Meter Energized
1	9101 LIGHTWAVE AVE	✓	✓		⚠	
2	9102 LIGHTWAVE AVE	✓	✓		⚠	
3	9103 LIGHTWAVE AVE	✓	✓		⚠	
4	9104 LIGHTWAVE AVE	✓			⚠	
5	9105 LIGHTWAVE AVE	✓			⚠	

Check marks indicate the current status for each lot.

A message will notify the customer if the billing application has not been received.



Electric Meters
Elect M501 PH1

Billing application has not been received for one or more addresses. Please ensure billing applications have been submitted for all addresses.

Lot/Bldg	Address	SDG&E Final Inspection	SDG&E Construction	City/County Release	Billing Application	Meter Energized
1	9101 LIGHTWAVE AVE	✓	✓		⚠	
2	9102 LIGHTWAVE AVE	✓	✓		⚠	
3	9103 LIGHTWAVE AVE	✓	✓		⚠	
4	9104 LIGHTWAVE AVE	✓			⚠	
5	9105 LIGHTWAVE AVE	✓			⚠	

Setting Filters

If preferred, set filters to help with the amount of information displayed. When first accessing this page, make sure to clear all previous filters. Select data to be displayed by using the following filters:

- Billing Application
 - Received
 - Not Received
- Meter Set
 - Show only addresses without meters set
- Lot/Building
 - Lot/building Number
 - Lot/building Range
- Progress
 - SDG&E Inspection
 - SDG&E Construction
 - City/County Release

Filters

Apply

Billing Application

Clear Filter

Received

Not Received

Meter Set

Clear Filter

Show only addresses without meters set

Lot/Building

Clear Filter

Lot/building Number

Lot/building Range

Progress

Clear Filter

SDG&E Inspection

SDG&E Construction

City/County Release

Close

Apply

Select filters above to narrow down the list of meters displayed on the page.

Sort By

Lot/Building

SDG&E Final Inspection	SDG&E Construction	City/County Release	Billing Application	Meter Energized
✓	✓		⚠	
✓	✓		⚠	
✓	✓		⚠	
✓	✓		⚠	
✓	✓		⚠	
✓	✓		⚠	

Filtering Results

Once filters have been applied, only the information requested will display.

View Project #00000026408

View Gas Meters Join 000000264500

Print This Page

Electric Meters

Exact MS01 PH

Customer Contact

Steve Smith 264-432-9483

SDG&E Project Manager

Carol Peterson 659-696-2339

speterson2@sewconractor.com

Trench Desk/Inspections

Southern Region 858-634-8806

Requirements

SDG&E Final Inspection

SDG&E Construction

City/County Release

Meter Energized

Billing application has not been received for one or more addresses. Please ensure billing applications have been submitted for all addresses.

Filters

Sort By

Lot/Building

Lot/Build	Address	SDG&E Final Inspection	SDG&E Construction	City/County Release	Billing Application	Meter Energized
1	9101 LIGHTWAVE AVE	✓	✓		⚠	
2	9102 LIGHTWAVE AVE	✓	✓		⚠	
3	9103 LIGHTWAVE AVE	✓	✓		⚠	
4	9104 LIGHTWAVE AVE	✓			⚠	
5	9105 LIGHTWAVE AVE	✓			⚠	

Development Job Details

Addresses for Developments display the building number with a plus (+) sign. Click the plus (+) sign to display the individual units for each building.

View Project #300000256408

View Gas Meters Job#300000256453

Electric Meters

Elect MSO2 PH1

Billing application has not been received for one or more addresses. Please ensure billing applications have been submitted for all addresses.

Filters

Sort By: Lot/Building

Lot/Bldg	Service Location	SDG&E Final Inspection	SDG&E Construction	City/County Release	Billing Application	Meter Energized
+	9101 LIGHTWAVE AVE	✓	✓		⚠	
+	9102 LIGHTWAVE AVE	✓			⚠	

View Project #300000256408

View Gas Meters Job#300000256453

Electric Meters

Elect MSO2 PH1

Billing application has not been received for one or more addresses. Please ensure billing applications have been submitted for all addresses.

Filters

Sort By: Lot/Building

Lot/Bldg	Service Location	SDG&E Final Inspection	SDG&E Construction	City/County Release	Billing Application	Meter Energized
+	9101 LIGHTWAVE AVE					
Meter Addresses	9101 LIGHTWAVE AVE 101	✓	✓		⚠	
	9101 LIGHTWAVE AVE 102	✓	✓		⚠	
	9101 LIGHTWAVE AVE 103	✓	✓		⚠	
	9101 LIGHTWAVE AVE 104	✓	✓		⚠	
	9101 LIGHTWAVE AVE 105	✓	✓		⚠	
+	9102 LIGHTWAVE AVE	✓			⚠	

Requirements that have been met will have a green checkmark. Those that are pending will have a red triangle, along with a message in red indicating detailed information that is pending.

If a meter has been set, the meter set date will display.

This page also lists the requirements for meter sets.

To set filters, click the Filters button.

Electric Meters

Elect MSO2 PH1

Billing application has not been received for one or more addresses. Please ensure billing applications have been submitted for all addresses.

Filters

Sort By: Lot/Building

Lot/Bldg	Service Location	SDG&E Final Inspection	SDG&E Construction	City/County Release	Billing Application	Meter Energized
+	9101 LIGHTWAVE AVE					
Meter Addresses	9101 LIGHTWAVE AVE 101	✓	✓		⚠	
	9101 LIGHTWAVE AVE 102	✓	✓		⚠	
	9101 LIGHTWAVE AVE 103	✓	✓		⚠	
	9101 LIGHTWAVE AVE 104	✓	✓		⚠	
	9101 LIGHTWAVE AVE 105	✓	✓		⚠	
+	9102 LIGHTWAVE AVE	✓			⚠	

Contacts

Customer Contact

Steve Smith 254-632-2483

SDG&E Project Manager

Carol Peterson 602-606-2733

peterson2@sewconcontractor.com

Trench Desk/Inspections

Southern Region 658-636-6805

Requirements

SDG&E Final Inspection

Electric Meters

SDG&E will provide a Final Inspection once the following requirements are complete:

- SDG&E trench inspection
- Manhole inspection

SDG&E Construction

SDG&E will schedule a construction crew once the SDG&E Final Inspection is complete.

City/County Release

Customer to contact City/County (Authority Having Jurisdiction) to obtain a final inspection of the meter panel.

Meter Energized

Electric Meters

SDG&E will energize the meter once the following requirements are complete:

- SDG&E Final Inspection of Site
- SDG&E Construction complete
- City/County Release
- Billing Application received by SDG&E

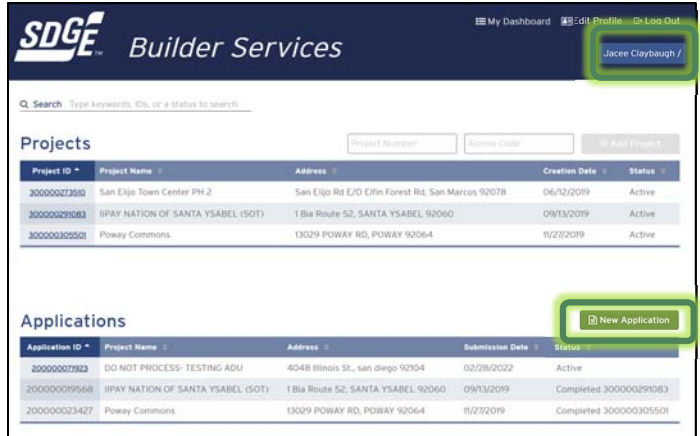
Uploading Documents

Document Upload Requirements

When logged into the Builder Services Portal, you will have the option to upload project documents to new applications being submitted, applications submitted while logged in, and projects in your dashboard



Ensure you are logged in at the time of submitting an application



The screenshot shows the SDGE Builder Services Portal dashboard. At the top right, the user is logged in as 'Jacee Claybaugh /'. Below the search bar, there are two main sections: 'Projects' and 'Applications'. In the 'Applications' section, the 'New Application' button is highlighted with a green box.

Project ID	Project Name	Address	Creation Date	Status
30000027359	San Edge Town Center PH 2	San Edge Rd E/O Lfin Forest Rd, San Marcos 92078	06/12/2019	Active
300000291083	IPAY NATION OF SANTA YSABEL (SOT)	1 Bile Route 52, SANTA YSABEL 92060	09/13/2019	Active
300000305501	Poway Commons	13029 POWAY RD, POWAY 92064	11/2/2019	Active

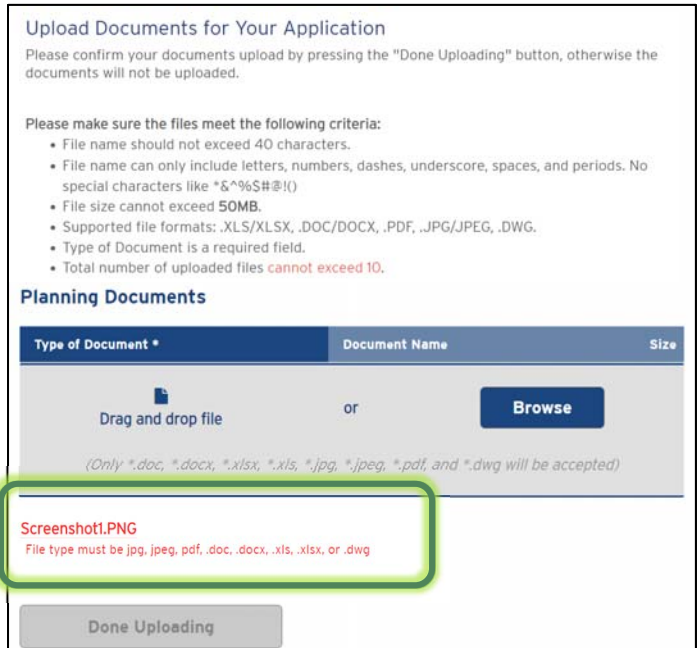
Application ID	Project Name	Address	Submission Date	Status
20000007982	DO NOT PROCESS- TESTING ADU	4048 Wilcox St., san diego 92104	02/28/2022	Active
20000009568	IPAY NATION OF SANTA YSABEL (SOT)	1 Bile Route 52, SANTA YSABEL 92060	09/13/2019	Completed 300000291083
200000023427	Poway Commons	13029 POWAY RD, POWAY 92064	11/2/2019	Completed 300000305501

File Criteria

Files must meet the following criteria to be uploaded:

- File name should not exceed 40 characters.
- File name can only include letters, numbers, dashes, underscore, spaces, and periods. No special characters like *&^%\$#@!()
- File size cannot exceed 100MB.
- Supported file formats: .XLS/XLSX, .DOC/DOCX, .PDF, .JPG/JPEG, .DWG.
- Type of Document is a required field.
- Total number of uploaded files cannot exceed 10.

Unsupported files will prompt an error message below your upload documents window.



The screenshot shows the 'Upload Documents for Your Application' window. It includes a list of file criteria and a 'Planning Documents' section with a table for document uploads. The 'Done Uploading' button is highlighted with a green box.


Upload Documents for Your Application

Please confirm your documents upload by pressing the "Done Uploading" button, otherwise the documents will not be uploaded.

Please make sure the files meet the following criteria:

- File name should not exceed 40 characters.
- File name can only include letters, numbers, dashes, underscore, spaces, and periods. No special characters like *&^%\$#@!()
- File size cannot exceed 50MB.
- Supported file formats: .XLS/XLSX, .DOC/DOCX, .PDF, .JPG/JPEG, .DWG.
- Type of Document is a required field.
- Total number of uploaded files **cannot exceed 10**.

Planning Documents

Type of Document *	Document Name	Size
 Drag and drop file	or	<input type="button" value="Browse"/>

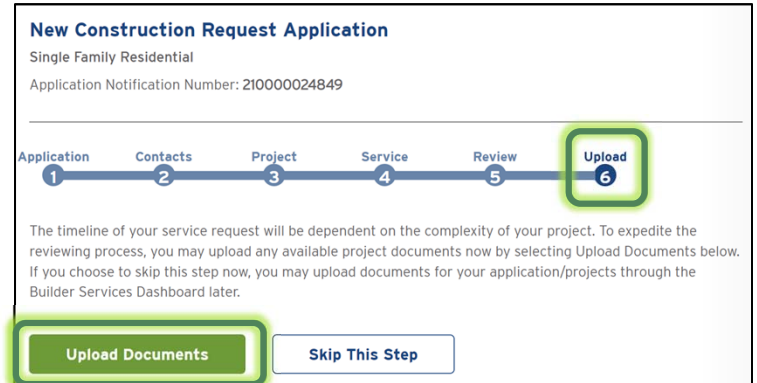
(Only *.doc, *.docx, *.xlsx, *.xls, *.jpg, *.jpeg, *.pdf, and *.dwg will be accepted)

Screenshot1.PNG
File type must be jpg, jpeg, pdf, .doc, .docx, .xls, .xlsx, or .dwg

Uploading Documents with a New Application

Uploading Documents

In step 6 of your application, select “Upload Documents” to navigate to the document upload page for your application.



New Construction Request Application
Single Family Residential
Application Notification Number: 210000024849

Application 1 Contacts 2 Project 3 Service 4 Review 5 **Upload 6**

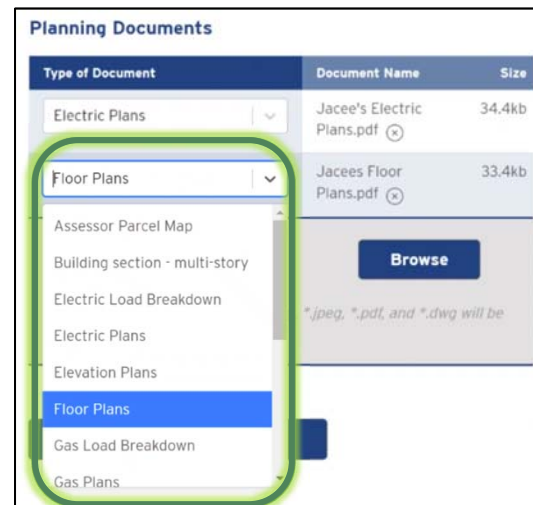
The timeline of your service request will be dependent on the complexity of your project. To expedite the reviewing process, you may upload any available project documents now by selecting Upload Documents below. If you choose to skip this step now, you may upload documents for your application/projects through the Builder Services Dashboard later.

Upload Documents Skip This Step

Document Type

Manually browse for or drag and drop the files to upload.

Select an option from the "Type of Document" drop down menu that best describes each file.



Planning Documents

Type of Document	Document Name	Size
Electric Plans	Jacee's Electric Plans.pdf	34.4kb
Floor Plans	Jacee's Floor Plans.pdf	33.4kb

Browse

*.jpeg, *.pdf, and *.dwg will be

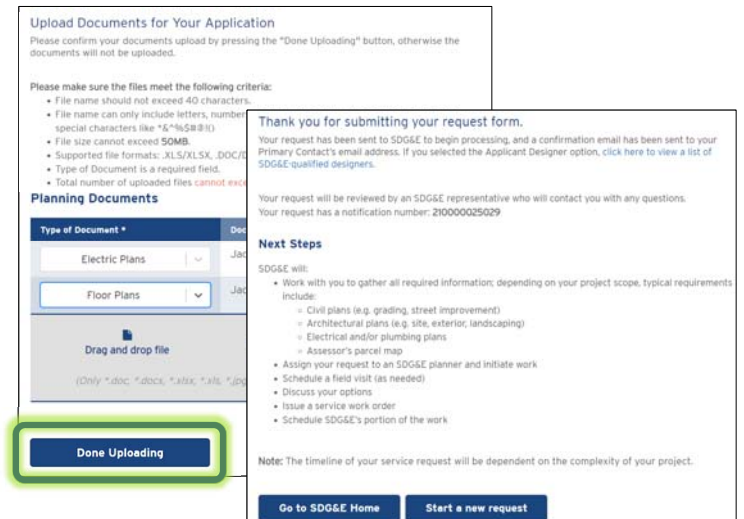
Assessor Parcel Map
Building section - multi-story
Electric Load Breakdown
Electric Plans
Elevation Plans
Floor Plans
Gas Load Breakdown
Gas Plans

Document Upload Confirmation

Select the “Done Uploading” button once all necessary files have been uploaded.

You will be redirected to a new page confirming your application has been submitted.

You will receive an email confirming that your application has been submitted.



Upload Documents for Your Application
Please confirm your documents upload by pressing the "Done Uploading" button, otherwise the documents will not be uploaded.

Please make sure the files meet the following criteria:

- File name should not exceed 40 characters.
- File name can only include letters, number, special characters like *&~%\$#@!()
- File size cannot exceed 50MB.
- Supported file formats: .XLS/.XLSX, .DOC/.DOCX
- Type of Document is a required field.
- Total number of uploaded files cannot exceed 10.

Planning Documents

Type of Document *	Document Name	Size
Electric Plans	Jacee's Electric Plans.pdf	34.4kb
Floor Plans	Jacee's Floor Plans.pdf	33.4kb

Drag and drop file
(Only *.doc, *.docx, *.xlsx, *.xls, *.xlsb, *.xls, *.xls, *.xls)

Done Uploading

Thank you for submitting your request form.
Your request has been sent to SDG&E to begin processing, and a confirmation email has been sent to your Primary Contact's email address. If you selected the Applicant Designer option, click here to view a list of SDG&E-qualified designers.

Your request will be reviewed by an SDG&E representative who will contact you with any questions.
Your request has a notification number: 210000025029

Next Steps

SDG&E will:

- Work with you to gather all required information; depending on your project scope, typical requirements include:
 - Civil plans (e.g. grading, street improvement)
 - Architectural plans (e.g. site, exterior, landscaping)
 - Electrical and/or plumbing plans
 - Assessor's parcel map
- Assign your request to an SDG&E planner and initiate work
- Schedule a field visit (as needed)
- Discuss your options
- Issue a service work order
- Schedule SDG&E's portion of the work

Note: The timeline of your service request will be dependent on the complexity of your project.

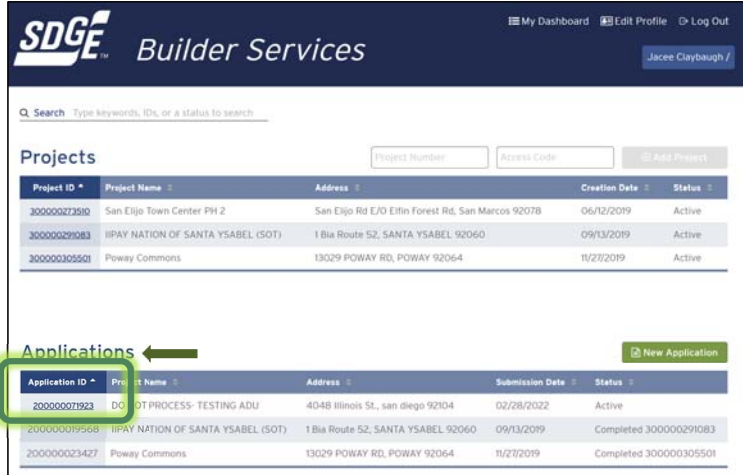
Go to SDG&E Home Start a new request

Uploading Documents to Existing Applications

Navigating to Application Upload Page

Under the “Applications” header of your dashboard, select the “Application ID” for the application you want to upload documents to.

This will navigate you to the document upload page for your application.



Application ID	Project Name	Address	Submission Date	Status
200000071923	DO NOT PROCESS- TESTING ADU	4048 Illinois St., San Diego 92104	02/28/2022	Active
200000079508	IPAY NATION OF SANTA YSABEL (SOT)	1 Bia Route 52, SANTA YSABEL 92060	09/13/2019	Completed 300000291083
200000023427	Poway Commons	13029 POWAY RD, POWAY 92064	11/27/2019	Completed 300000305501

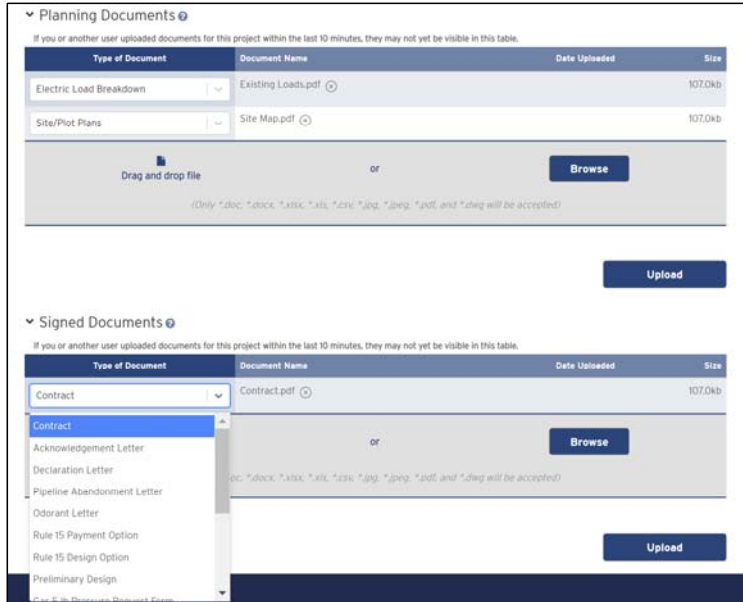
Uploading Documents

Here you can upload planning documents or signed documents.

Manually browse for or drag and drop the files to upload.

Select an option from the "Type of Document" drop down menu that best describes each file.

Click the “Upload” button once all necessary files have been selected.



Type of Document	Document Name	Date Uploaded	Size
Electric Load Breakdown	Existing Loads.pdf		107.0Kb
Site/Plot Plans	Site Map.pdf		107.0Kb

Drag and drop file or [Browse](#)

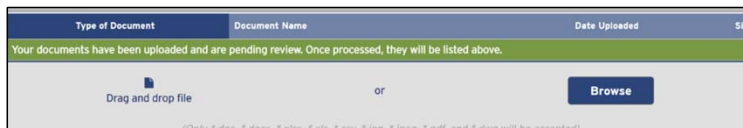
(Only *.doc, *.docx, *.xlsx, *.xls, *.csv, *.jpg, *.jpeg, *.pdf, and *.dwg will be accepted)

[Upload](#)

Upload Confirmation

A green banner will confirm your upload.

You will receive an email confirming your documents have been uploaded.



Type of Document	Document Name	Date Uploaded	Size
Contract	Contract.pdf		107.0Kb

Drag and drop file or [Browse](#)

(Only *.doc, *.docx, *.xlsx, *.xls, *.csv, *.jpg, *.jpeg, *.pdf, and *.dwg will be accepted)

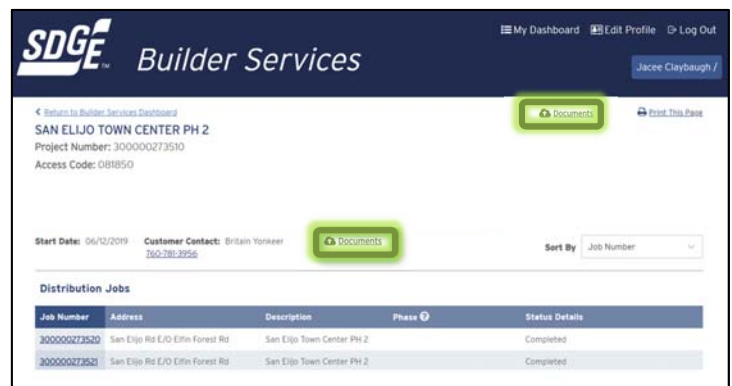
[Upload](#)


Uploading Documents for an Active Project

Navigating to Document Upload Page

Under the “Projects” header of your dashboard, select the “Project ID” for the project you want to upload documents to.

This will navigate you to your Project’s Summary Page.



Select  **Documents** on the Summary Page.

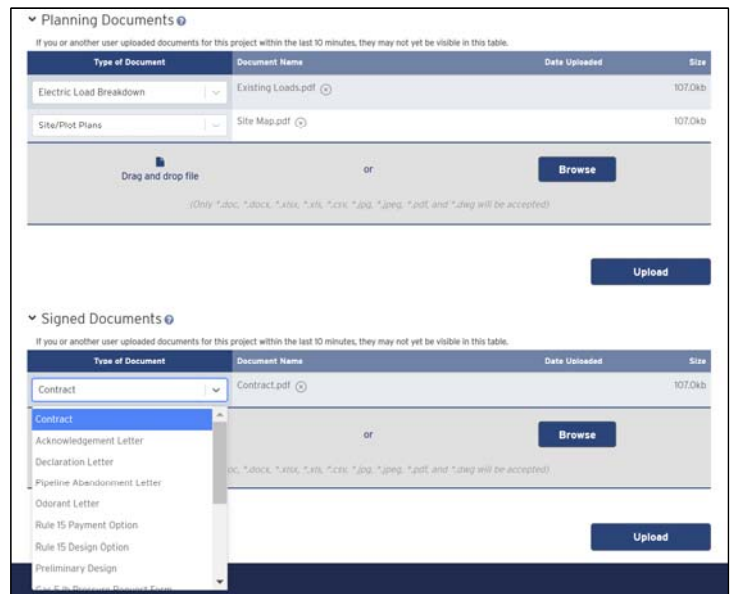
Uploading Documents

Here you can upload planning documents or signed documents.

Manually browse for or drag and drop the files to upload.

Select an option from the "Type of Document" drop down menu that best describes each file.

Click the “Upload” button once all necessary files have been selected.



Upload Confirmation

A green banner will confirm your upload.

You will receive an email confirming your documents have been uploaded.

