



# BENCHMARKING DATA REQUEST PORTAL USER GUIDE

*[benchmarking@semprautilities.com](mailto:benchmarking@semprautilities.com)*

# Contents

EPA Portfolio Manager.....	3
SDG&E Consent to Share - Letter Of Authorization Information.....	3
1. New to Portfolio Manager? Register Now .....	4
1.1 Enter Profile Information .....	5
1.2 Complete Profile Information & Create Account .....	6
2. Already Have a Portfolio Manager Account? Start Here .....	7
3. Connecting to SDGE .....	8
3.1 .....	8
3.2 .....	9
3.3 .....	9
3.4 .....	9
3.5 .....	10
4. Add a Property .....	10
4.1 .....	11
4.2 .....	12
4.3 .....	12
4.4 .....	13
4.5 .....	14
4.6 .....	15
5. Share Properties .....	15
5.1 .....	15
5.2 .....	16
5.3 .....	17
5.4 .....	18
5.5 .....	19
5.6 .....	19
5.7 .....	20
5.8 .....	20
5.9 .....	21
5.10 .....	21
6. Benchmarking Portal Step 1 - Online Benchmarking Request System .....	22
7. Benchmarking Portal Step 2 - Requestor Information.....	22
Example .....	23

- 8. Benchmarking Portal Step 3 - Building Information..... 24
  - 8.1 Retrieving Shared Properties Status Updates ..... 25
  - 8.2 Finalizing Shared Properties Status Updates..... 25
  - 8.3 Select Retrieved Properties ..... 26
  - 8.4 Select/De-select Meters..... 27
- 9. How to Add A Secondary Property to A Primary Property ..... 28
  - 9.1 Enter Street Address, ZIP code & Search ..... 28
  - 9.2 System Performs Search of Address..... 29
  - 9.3 Select Address, Enter Building Name & Add ..... 29
  - 9.4 Click to select the Secondary Property Added under Primary Primary Property ... 30
- 10. How to Associate a Verified Address to an Unverified Property..... 30
  - 10.1 Search for Premise Address..... 31
  - 10.2 Select Address From Search Results List & Add..... 32
  - 10.3 Premise is Associated ..... 33
  - 10.4 Click Next ..... 33
  - 10.5 Click Next ..... 34
- 11. Customer Authorization ..... 34
  - 11.1 Validate Account - Enter Meter Trio Data (if available) ..... 35
  - 11.2 Validate Account - Enter Meter Trio Data (if available) ..... 35
  - 11.3 Review & Submit Request ..... 36
  - 11.4 Request Submitted ..... 36
  - 11.5 Request Information Downloaded ..... 36
  - 11.6 Request Information Download - Maintain for your records ..... 37
- 12. Status Check..... 37
  - 12.1 Click Property Name to Enter Meter Trio Data..... 38
  - 12.2 Click to enter Meter Trio Data..... 38
  - 12.3 Enter Meter Trio Data ..... 39
  - 12.4 Update Deliver Method (as needed) & Submit Changes..... 39

## EPA Portfolio Manager

EPA's online energy management and tracking tool enables you to measure and track the energy and water performance of any building over time. The steps below display the high-level process to begin a Benchmarking Request. All requests begin Portfolio Manager Account Registration (if not yet completed).

## SDG&E Consent to Share - Letter Of Authorization Information


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

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

The screenshot shows the SDG&E website interface. At the top left is the SDG&E logo with the tagline "Semptra Energy". At the top right is the "Consent to Share" logo with a link to "Click to read about popups and cookies". Below the logo is a blue navigation bar with "Home" and a dropdown arrow. The main heading is "What would you like to do today?". There are three main sections: 1. "Login to Consent to Share" with a login icon, email and password input fields, a "Login" button, and links for "Forgot your password?", "Not registered? Register here.", "Why should I register?", and "Terms and Conditions". 2. "Create a New Letter of Authorization as a Guest User" with a user icon, a "Create" button, and links for "What is a Letter of Authorization?" and "How do I submit a paper Letter of Authorization?". 3. "View Status of My Letter of Authorization" with a document icon, an input field for "Enter 10 digit LOA ID", and a "View Status" button with an information icon.

# 1. New to Portfolio Manager? Register Now

Click [here](#) to create an account.



The most-used energy measurement and tracking tool for commercial buildings.


### Use Portfolio Manager

You've heard it before: you can't manage what you don't measure. That's why EPA created ENERGY STAR Portfolio Manager®, an online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions. Use it to benchmark the performance of one building or a whole portfolio of buildings, all in a secure online environment.

### Not sure if Portfolio Manager is for you? It is!


You can use Portfolio Manager to manage the energy and water use of any building. Seriously. Any building. K-12 school? Check. Office building? Check. Stadium? Check. We could keep going. All you need are your energy bills and some basic information about your building to get started.

Are you designing a new commercial building? You can also use Portfolio Manager to set your energy use target and see how your estimated design energy stacks up against similar existing buildings nationwide.




### Join the rest of the industry.

When you add your buildings, you'll be joining 40 percent of U.S. commercial building space that's already benchmarked in Portfolio Manager — making it the industry-




### "Ask The Expert" webinar


Every Wednesday at 12pm noon ET



### New! Licensed Professional Finder

Enter your zip code to find Licensed Professionals that have verified properties near you for ENERGY STAR certification.





EPA's online energy management and tracking tool enables you to measure and track the energy and water performance of any building over time. Register now

Log in

username

password

[Forgot password?](#) [Forgot username?](#)

## 1.1 Enter Profile Information

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as \*, #, %, etc.).

Confirm Password: \*

### About Yourself

First Name: \*

Last Name: \*

Job Title: \*

Email: \*

Confirm Email: \*

Note: We never share your email address with third parties.

Phone: \*

Country: \*

Language:

Reporting Units:  Conventional EPA Units (e.g., kBtu/ft<sup>2</sup>)  Metric Units (e.g., GJ/m<sup>2</sup>)

Street Address: \*

City/Municipality: \*

"noreply@energystar.gov" to your address book to ensure delivery.

.....

### Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

.....

## 1.2 Complete Profile Information & Create Account

City/Municipality: \*   
State/Province: \* --- Select --- ▾  
Postal Code: \*

### About Your Organization

Organization Name: \*

Primary Business or Service of Your Organization: \*


Is your organization an ENERGY STAR Partner?  Yes  No

### Searchability in Portfolio Manager

Can other people search for you and send you a [connection request](#)?  Yes  No


### Confirm Your Identity

Please confirm that you are a human

I'm not a robot  reCAPTCHA  
Privacy - Terms

**i Primary Business or Service**  
If you have more than one "primary business," just pick the best option. Portfolio Manager will determine your category for a score based on the information, like square footage, that you enter for each of your property uses.

**i Connecting with Others in Portfolio Manager**  
You can [connect with other people](#) in Portfolio Manager to easily share information. Your account must be searchable in order for others to send you a connection request.

 **Create My Account** [Cancel](#)

## 2. Already Have a Portfolio Manager Account? Start Here

up

ENERGY STAR®  
**PortfolioManager®**

EPA's online energy management and tracking tool enables you to measure and track the energy and water performance of any building over time.

[Register now](#)

Log in

username

password

[Forgot password?](#)

[Forgot username?](#)

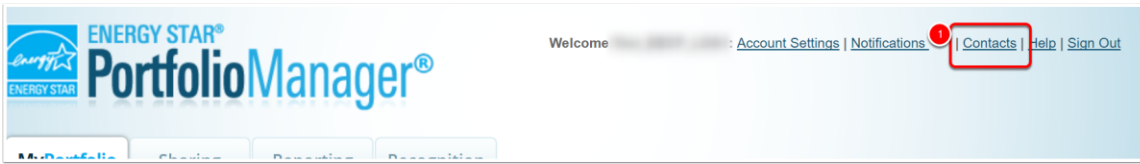
PORTFOLIO MANAGER  
DATA COLLECTION

Building  
y-  
100®,  
illeges



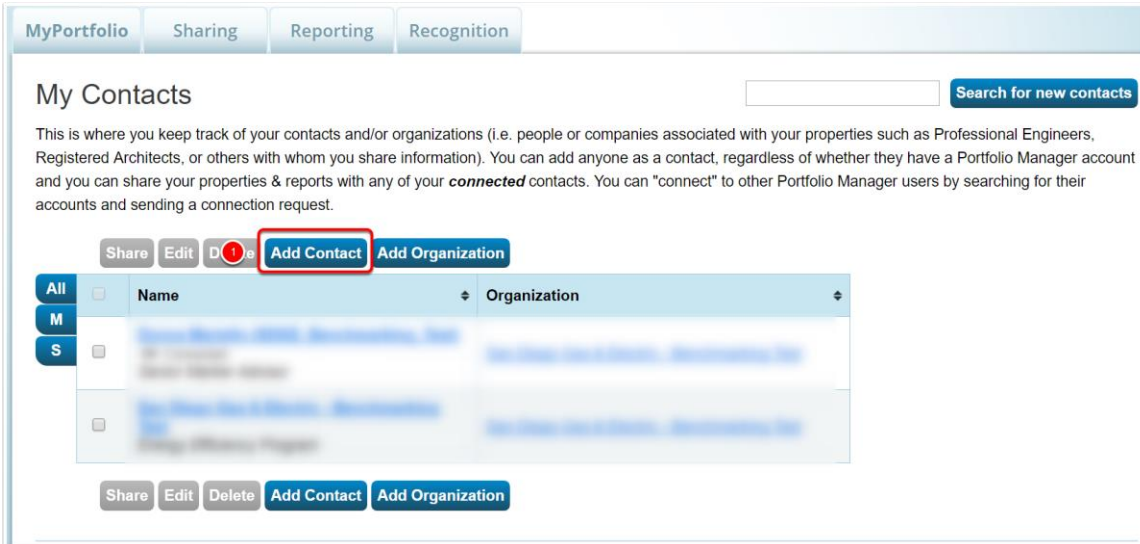
### 3. Connecting to SDGE

1. Click **Contacts** - this step will allow user to enter SDGE as data provider



#### 3.1

1. Click **Add Contact**



### 3.2

1. Enter **SDGE Benchmarking** in Name field (*Note: do not add & or other characters*)
2. Click **Search**

### Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the cc Manager account, then you can create an entry within your personal contacts.

#### Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:  1

Organization:

Username:

Email:

2  [Cancel](#)

### 3.3

1. Click **Connect**

MyPortfolio | Sharing | Reporting | Recognition

### Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

#### Your Search Criteria

Name:

Organization:

SDGE Benchmarking  
SDGE Benchmarking Web Service with SDGE

1

Page 1 of 1 | 50 | 1 - 1 of 1

### 3.4

1. Review Terms & Conditions
2. Click ***I Agree to my providers (SDGE Benchmarking) Terms of Use***

### 3. Click **Send Connection Request**

Send a Connection Request to [SDGE Benchmarking](#) to Begin Exchanging Data

[SDGE Benchmarking](#) requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [SDGE Benchmarking](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use:

**AUTHORIZATION FOR UTILITY TO RELEASE CUSTOMER USAGE DATA TO ENERGY STAR®**

**PORTFOLIO MANAGER INTERNET APPLICATION**

**AND**

**NON-DISCLOSURE AGREEMENT**

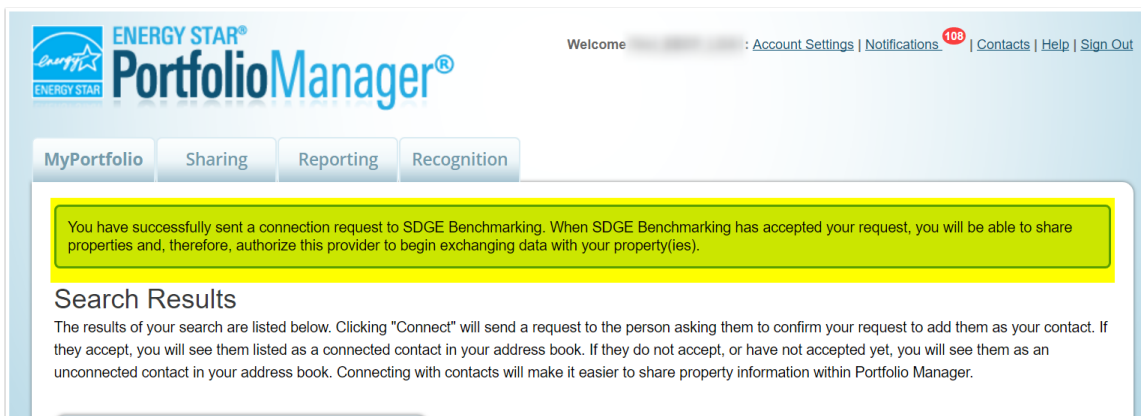
This AUTHORIZATION FOR UTILITY TO RELEASE CUSTOMER USAGE DATA TO ENERGY STAR® PORTFOLIO MANAGER INTERNET APPLICATION AND NON-DISCLOSURE AGREEMENT ("Agreement") is an agreement between the owner or operator ("Owner/Operator") of the building(s) identified by Owner/Operator (each, a "Building") in the Environmental Protection Agency's ("EPA") Energy Star® Portfolio Manager application ("Portfolio Manager") and San Diego Gas & Electric Company ("Utility"), and governs the release of Utility data to the EPA and to Owner/Operator. As used herein, Utility and Owner/Operator may each

Agreement:  I agree to my provider's ([SDGE Benchmarking](#)) Terms of Use.

**Send Connection Request** [Cancel](#)

## 3.5

### Connection Request Sent



The screenshot shows the Energy Star Portfolio Manager interface. At the top, there is a navigation bar with the Energy Star logo and the text "Portfolio Manager". Below the navigation bar, there are tabs for "MyPortfolio", "Sharing", "Reporting", and "Recognition". A yellow highlighted box contains the following text: "You have successfully sent a connection request to SDGE Benchmarking. When SDGE Benchmarking has accepted your request, you will be able to share properties and, therefore, authorize this provider to begin exchanging data with your property(ies)." Below this message, there is a section titled "Search Results" with a paragraph of text explaining the search results and the "Connect" button.

## 4. Add a Property

### 1. Click **Add a Property**

## 4.1

### 1. Populate property information

**Note:** Campus Guidance - There are 5 property types that constitute a campus: K-12 School, Multifamily Housing, Hospital, Hotel, and Senior Care Community. For other property types, each individual building must be benchmarked and certified individually.

## 4.2

### 1. Set up a Property by entering Basic Property Information

The screenshot shows the 'Set Up a Property: Basic Property Information' form in the Energy Star Portfolio Manager interface. The form is titled 'Set Up a Property: Basic Property Information' and includes a sub-header 'About Your Property'. The form fields are: Name (text input), Country (dropdown menu), Street Address (two stacked text inputs), City/Municipality (text input), State/Province (dropdown menu), Postal Code (text input), Year Built (text input), Gross Floor Area (text input with a unit dropdown 'Sq. Ft.' and a checkbox for 'Temporary Value'), Irrigated Area (text input with a unit dropdown 'Sq. Ft.'), and Occupancy (dropdown menu followed by a percentage sign). A tip box on the right states: '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.' A red box highlights the main form area.

## 4.3

### 1. Complete property profile

### 2. Click **Continue**

The screenshot shows the 'Do any of these apply?' form in the Energy Star Portfolio Manager interface. The form asks 'Do any of these apply?' and lists five options with checkboxes: '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', 'My property has one or more restaurants/cafeterias', and 'My property has a trading floor'. A red box highlights the form area. A tip box on the right states: 'Answering these simple questions will help us guide you in entering your property correctly.' At the bottom, there are 'Back', 'Continue', and 'Cancel' buttons. A red box highlights the 'Continue' button, and a red circle with the number '1' is next to the first checkbox, and a red circle with the number '2' is next to the 'Continue' button.

## 4.4

**Note: Adding Another Type of Use (see below) - Portfolio Manager uses the term "Type of Use" to characterize the various spaces within a building. Your building may have one or more property use types. For example, an office building might have occupied office space, a computer data center, and parking. Each of these should be entered as a separate "Type of Use" and will require different information. If more than 10% of a building's gross floor area is vacant, the vacant square footage should be described as a distinct space type. Links to more information on how these space types are defined can be found in the Portfolio Manager Online Help section.**

ENERGY STAR®  
ENERGY STAR  
**PortfolioManager®**

Welcome To [User Name] | [Account Settings](#) | [Notifications](#) <sup>117</sup> | [Contacts](#) | [Help](#) | [Sign Out](#)

### Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

[Basic Information](#)

Name:	Test	Country:	US
Property Type:	<a href="#">Financial Office</a>	Address:	123 Test Street San Diego, CA 92123 <a href="#">Map It</a>
Year Built:	1950		
Property consists of:	0 building		

[Edit](#)

[Add Another Type of Use](#) [Add](#)

## 4.5

1. Add additional property use information (optional)
2. Click **Add Property**

**Name:** Test **Country:** US

**Property Type:** [Financial Office](#) **Address:** 123 Test Street [Map It](#)  
San Diego, CA 92123

**Year Built:** 1950

**Property consists of:** 0 building

[Edit](#)

Add Another Type of Use [Add](#)

**Financial Office Use** [Edit Name](#)

Financial Office refers to buildings used for financial services such as bank headquarters and securities and brokerage firms.

Gross Floor Area should include all space within the building(s) including offices, trading floors, conference rooms and auditoriums, vaults, kitchens used by staff, lobbies, atriums, fitness areas for staff, storage areas, stairways, and elevator shafts.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	10000 <input type="text"/> Sq. Ft. <input type="text"/>	1/1/1950 <input type="text"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1950 <input type="text"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1950 <input type="text"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1950 <input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1950 <input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1950 <input type="text"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

Add Another Type of Use [Add](#)

[Back](#) [Add Property](#) [Cancel](#)

## 4.6

The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top, there is a navigation bar with the logo and the text "Welcome [user name] | Account Settings | Notifications 117 | Contacts | Help | Sign Out". Below the navigation bar, there are tabs for "MyPortfolio", "Sharing", "Reporting", and "Recognition". A green message box states: "Congratulations! You have successfully created your property. Next, you can: • Add energy use information, so that you can see your energy performance metrics." Below this, there is a section for a property named "Test" with the address "123 Test Street, San Diego, CA 92123 | Map It", "Portfolio Manager Property ID: 6159912", and "Year Built: 1950". There is an "Edit" link. To the right, there is a box indicating "Not eligible to apply for ENERGY STAR Certification" and a "Weather-Normalized Source EUI (kBtu/ft²)" section with "Current EUI: N/A" and "Baseline EUI: N/A". At the bottom, there are tabs for "Summary", "Details", "Energy", "Water", "Waste & Materials", "Goals", and "Design".

## 5. Share Properties

1. Click **Sharing** tab

The screenshot shows the ENERGY STAR Portfolio Manager interface with the "Sharing" tab highlighted in a red box. The navigation bar at the top includes the logo and "Welcome [user name] | Account Settings | Notifications 108 | Contacts | Help | Sign Out". The tabs below the navigation bar are "MyPortfolio", "Sharing", "Reporting", and "Recognition".

### 5.1

1. Click **Share (or Edit Access to) a Property**

The screenshot shows the ENERGY STAR Portfolio Manager interface with the "Sharing" tab selected. The navigation bar at the top includes the logo and "Welcome [user name] | Account Settings | Notifications 108 | Contacts | Help | Sign Out". The tabs below the navigation bar are "MyPortfolio", "Sharing", "Reporting", and "Recognition". The "Sharing" tab is active, showing a section for "My Shared Properties (34)" with three buttons: "Share (or Edit Access to) a Property" (highlighted with a red box), "Set Up Web Services/Data Exchange", and "Download Sharing Report". To the right, there is a "Sharing Notifications (104) View All" section with a list of notifications and "Clear" buttons.



## 5.2

1. Select Number of Properties (multiple example below)
2. Click **Select Properties**

Welcome T... : Account Settings | Notifications <sup>119</sup> | Contacts | Help | Sign Out

MyPortfolio | **Sharing** | Reporting | Recognition

### Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.

**1** **Select Properties**

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

Multiple Properties **1** **Select Properties** **2** [Selected Properties: 0](#)

**2** **Select People (Accounts)**

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

SDGE Benchmarking (SDGE)

**Sharing with Accounts**

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

**Exchanging Data**

To get started, first [connect with an organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left. **Note: you can now share in bulk for [exchanging data](#).**

**Who gets to Share Forward?**

**NEW** Full Access - Automatically includes "Share Forward" rights

## 5.3

1. Select Properties

2. Click **Apply Selections**

ENERGY STAR® Portfolio Manager®

Welcome to Portfolio Manager | Account Settings | Notifications <sup>99</sup> | Contacts | Help | Sign Out

MyPortfolio | **Sharing** | Reporting | Recognition

### Select Properties

Search:

<input type="checkbox"/>			Single F
<input type="checkbox"/>			Single F
<input type="checkbox"/>			Single F
<input type="checkbox"/>			Single F
<input type="checkbox"/>			Single F
<input type="checkbox"/>			Single F
<input type="checkbox"/>			Social/M
<input checked="" type="checkbox"/>	Test1		Financia
<input checked="" type="checkbox"/>	Test2		Bank Br
<input checked="" type="checkbox"/>	Test3		Bank Br

Filter Properties (41)

**Filter by Property Type**

- Bank Branch (3)
- Bowling Alley (1)
- College/University (1)

**Filter by Construction Status**

- Existing (3)
- Test (38)

**Filter by State/Province**

- California (41)

**Filter by Shared from**

- None - My Properties (PDA) (41)

First Previous Page 1 of 1 Next Last 100

Selected Properties: 3 ([View Selection](#))

**Apply Selection** Cancel

connected contacts appear in this list. Custom - you decide, along with the individual permissions for property, meter, goals and recognition

## 5.4

1. Select **SDGE Benchmarking (SDGE)** from Contacts list
2. Click **Personalize Sharing & Exchange Data**
3. Click **Share Property(ies)**

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

Please select properties to share. (If no properties are in the list, this means you do not have permission to share any of the properties in your portfolio.)

Multiple Properties Select Properties Selected Properties: 3

### Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

SDGE Benchmarking (SDGE) 1

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your [connected contacts](#) appear in this list.

### Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

\*  **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests)

**Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

Continue [Cancel](#)

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, you need to go to the "Add Contact" or "Add Organization" page for them within Portfolio Manager (they need a Portfolio Manager account). Once you find a "Connection" request. After they accept your request, they will show up on the list to the left.

### Exchanging Data

To get started, first [connect with an organization](#) and [exchange data](#). Once you are connected, you will appear on the selection list on the left. You can now share in bulk for [exchanging data](#).

### Who gets to Share Forward

**Full Access** - Automatically includes "Share" rights

**Read Only** - Automatically does NOT include "Share" rights

**Custom** - You decide, along with the individual permissions for property, meter, goals and permissions.

**Exchange Data** - You decide, along with the individual permissions for property, meter, goals and permissions.


## 5.5

### 1. Click **Exchange Data**

MyPortfolio
Sharing
Reporting
Recognition

### Share Your Property(ies)

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



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

**NEW Who gets to Share Forward?**

**Full Access** - Automatically includes "Share Forward" rights

**Read Only** - Automatically does NOT include "Share Forward" rights

**Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

**Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Sort by: Property Name ▾

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ <a href="#">Test1</a> (6161186)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<a href="#">SDGE Benchmarking</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ <a href="#">Test2</a> (6161188)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<a href="#">SDGE Benchmarking</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
▼ <a href="#">Test3</a> (6161189)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<a href="#">SDGE Benchmarking</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Share Property(ies)
Cancel

## 5.6

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

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

## 5.7

Select Access Permissions to [Test1](#) for [SDGE Benchmarking](#).

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

**Additional Options:**

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

## 5.8

**Exchange Data** - you decide, along with the individual permissions for property, meter, goals and recognition permissions.

Sort by:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ <a href="#">Test1</a> (6161186)					
<a href="#">SDGE Benchmarking</a>	<input type="radio"/>				<input checked="" type="radio"/> <a href="#">Edit</a>
▼ <a href="#">Test2</a> (6161188)					
<a href="#">SDGE Benchmarking</a>	<input type="radio"/>				<input checked="" type="radio"/> <a href="#">Edit</a>
▼ <a href="#">Test3</a> (6161189)					
<a href="#">SDGE Benchmarking</a>	<input type="radio"/>				<input checked="" type="radio"/> <a href="#">Edit</a>

## 5.9

The screenshot shows the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo and the text "ENERGY STAR® PortfolioManager®". At the top right, it says "Welcome Test\_EECP\_LOA3: [Account Settings](#) | [Notifications](#) <sup>102</sup> | [Contacts](#) | [Help](#) | [Sign Out](#)". Below the header are tabs for "MyPortfolio", "Sharing", "Reporting", and "Recognition". A yellow notification box contains the text: "You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required. If you edited web services Custom ID fields, [read this](#)." Below this are two main sections. On the left, "My Shared Properties (38)" includes buttons for "Share (or Edit Access to) a Property", "Set Up Web Services/ Data Exchange", and "Download Sharing Report". On the right, "Sharing Notifications (99) [View All](#)" shows a list of notifications. The first notification is "Test1 - Sharing request sent to [SDGE Benchmarking](#)" with "Cancel" and "Clear" buttons. The second is "Test3 - Sharing request sent to [SDGE Benchmarking](#)" with "Cancel" and "Clear" buttons.

## 5.10

The screenshot shows the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo and the text "ENERGY STAR® PortfolioManager®". At the top right, it says "Welcome [redacted] [Account Settings](#) | [Notifications](#) <sup>106</sup> | [Contacts](#) | [Help](#) | [Sign Out](#)". Below the header are tabs for "MyPortfolio", "Sharing", "Reporting", and "Recognition". A notification box contains the text: "You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required. If you edited web services Custom ID fields, [read this](#)." Below this are two main sections. On the left, "My Shared Properties (35)" includes a button for "Share (or Edit Access to) a Property". On the right, "Sharing Notifications (105) [View All](#)" shows a list of notifications. The first notification is "Test - Share accepted by [SDGE Benchmarking](#) because Your request has been verified and accepted." with a "Clear" button.

## 6. Benchmarking Portal Step 1 - Online Benchmarking Request System

**Internet browser settings best viewed at 150%.**

1. Indicate who is completing request
2. Click **Next**

The screenshot shows the 'Step 1: Getting Started' page of the SDG&E Benchmarking Data Request Portal. The page title is 'Welcome to SDG&E's Benchmarking Data Request Portal'. Below the title, it says 'Please follow the steps to complete and submit your request. You will need the following information to continue:'. A bullet point indicates the need for an 'ENERGY STAR Portfolio Manager Username (Need help? Click [here](#) view the User Guide)'. Below this, it says 'Let's get started...'. A red circle with the number '1' highlights the instruction 'Indicate who is completing this application:'. Below this instruction are four radio button options: 'I am the building owner', 'I am the building owner's agent', 'I am the SDG&E account holder', and 'Other (please enter name & title below)'. A red circle with the number '1' is also placed to the right of these options. At the bottom right, there is a 'Next >>' button.

## 7. Benchmarking Portal Step 2 - Requestor Information

1. Enter **Requestor details**
2. Enter **Mailing information** (if different from business address)
3. Enter **Requestor Organization Name** (optional)

See next screen for example:

The screenshot shows the 'Step 2: Requestor Information' page. The page title is 'Requestor Information'. Below the title, it says 'Note: Addresses of buildings included in your Benchmarking Request will be shown when you retrieve the shared properties from Portfolio Manager on the Building Information Step.' Below this, there are two main sections: 'Requestor Details' and 'Requestor Business Address'. The 'Requestor Details' section has a red circle with the number '1' and contains fields for First Name, Last Name, Primary Phone, Alt Phone, Fax, and Email. The 'Requestor Business Address' section has a red circle with the number '1' and contains fields for Street, Unit, ZIP / Postal Code, City, and State. A red box highlights the 'Requestor Business Address' section, and a red callout box says 'Type Requestor Address and select correct one from list'. Below the 'Requestor Business Address' section, there is a question 'Is the mailing address the same as the Requestor Business Address?' with a red circle with the number '2' and radio buttons for 'Yes' and 'No'. Below this, there is an 'Additional Requestor Information' section with a red circle with the number '3' and a field for 'Organization'. At the bottom right, there are '<< Back' and 'Next >>' buttons.

## Example

Note: Typing ahead will display address options - select correct options and valid address will populate remaining fields. **(see below).**

### 1. Click **Next**

**Step 1:**  
Getting Started

**Step 2:**  
Requestor Information

**Step 3:**  
Building Information

Step 4:  
Customer Authorization

Step 5:  
Review and Submit

Step 6:  
Confirmation

#### Requestor Information

*Note: Addresses of buildings included in your Benchmarking Request will be shown when you retrieve the shared properties from Portfolio Manager on the Building Information Step.*

**Requestor Details**

First Name:

Last Name:

Primary Phone:

All Phone:

Fax:

Email:

**Requestor Business Address**

Street:  ✓

Unit:

ZIP / Postal Code:

City:

State:

**Mailing Address**

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

**Additional Requestor Information**

Organization:

Valid address denoted by green check

1

<< Back Next >>



## 8. Benchmarking Portal Step 3 - Building Information

1. Enter **Portfolio Manager Username**
2. Select **Type**
3. Select **Frequency**
4. Select **Delivery Method** - Portfolio Manager or Download
5. Click to agree with **Terms and Conditions** (properties will not be retrieved unless terms are agreed to)
6. Click checkbox to agree with **Terms & Conditions** (this will enable you to retrieve shared properties from Portfolio Manager)
7. Click **Retrieve Shared Properties** (**Note: Property retrieval times vary according to number of properties in Portfolio Manager**)
8. Click **Next**

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

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

*Note: Property retrieval times may vary depending on number of shared properties in Portfolio Manager.*

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

Portfolio Manager Information

Portfolio Manager Username:  (1)

Request Type/Frequency: Aggregated (2) | Recurring (3)

Delivery Method: Download (4)

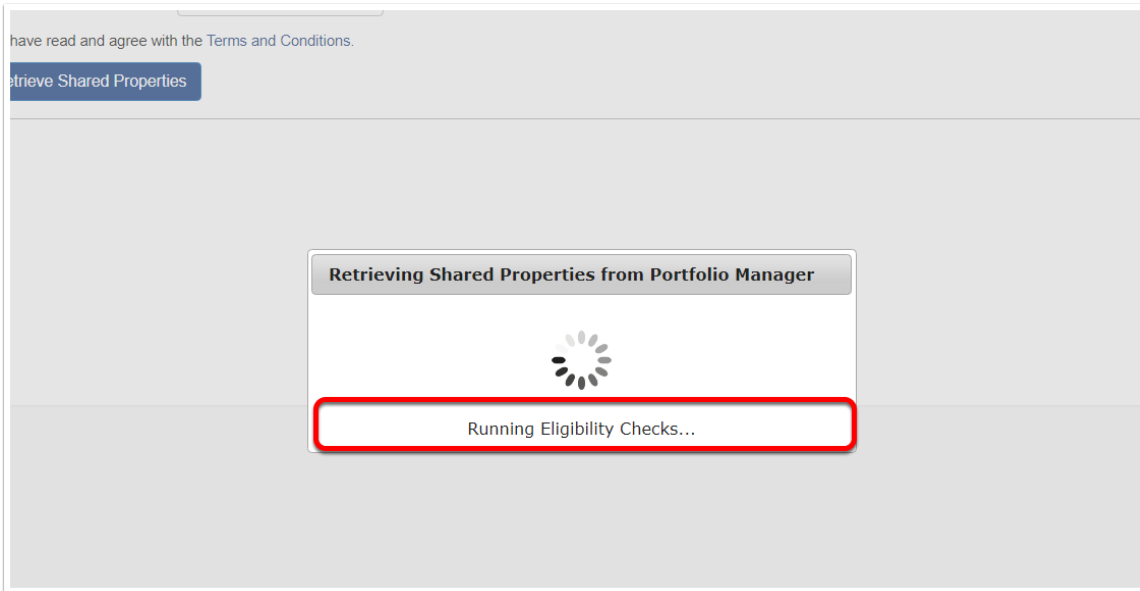
(5) I have read and agree with the Terms and Conditions (6)

Retrieve Shared Properties (7)

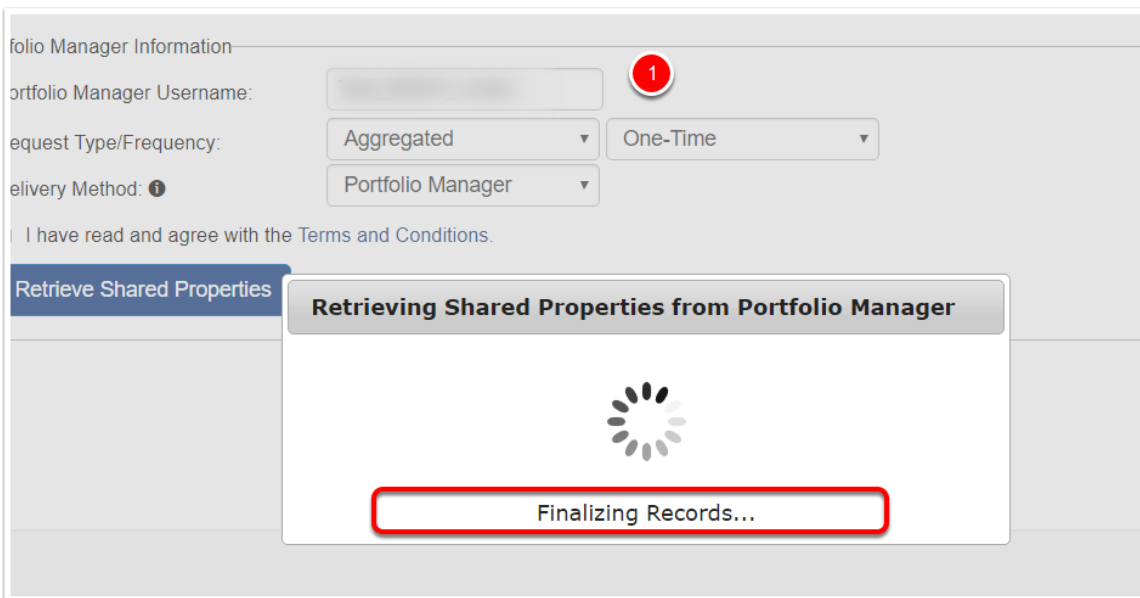
Click on Terms and Conditions to review

<< Back (8) | Next >>

## 8.1 Retrieving Shared Properties Status Updates



## 8.2 Finalizing Shared Properties Status Updates



### 8.3 Select Retrieved Properties

**Note: All properties associated with Portfolio Manager User Name will be auto-selected (with the exception of those that have an unverified address and/or are not a covered building).**

1. Click **Property Name** to View Associated Meters/Accounts

Portfolio Manager Information

Portfolio Manager Username:

Request Type/Frequency: Aggregated Recurring

Delivery Method: Portfolio Manager

I have read and agree with the Terms and Conditions.

[Retrieve Shared Properties](#)

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

Property Name	Portfolio Manager Property ID	Address	Request Type	Verified Address?	Meters
<input checked="" type="checkbox"/> LOA_Comm_Scenario14 +	60276	ia St Ste 100 San Diego, CA 92101-1766 US	Aggregated	Yes	1/1
<input checked="" type="checkbox"/> LOA_Comm_Scenario15 +	60663	iversity Ave San Diego, CA 92105-8025 US	Aggregated	Yes	6/6
<input type="checkbox"/> LOA_Res_Scenario4 +	60253	ia St Apt 1 San Diego, CA 92101-1762 US	Aggregated	Yes	0/2
<input type="checkbox"/> LOA_Res_Scenario5 +	60254	ms Ave # 164 San Diego, CA 92116-1604 US	Aggregated	No	0/0
<input checked="" type="checkbox"/> LOA_Res_Scenario8 +	60254	ms Ave Ste A San Diego, CA 92116-2405 US	Aggregated	Yes	1/1
<input type="checkbox"/> LOA_Res_Scenario9 +	60254	h St Apt 1 San Diego, CA 92102-2355 US	Aggregated	Yes	0/2
<input type="checkbox"/> LOA_res_Scenario7 +	60254	h St Apt B San Diego, CA 92104-5535 US	Aggregated	Yes	0/1

All Shared Properties Retrieved

## 8.4 Select/De-select Meters

1. Use arrows to scroll through and review properties.

**Note: Go To Property List** will close this window and return to full list of properties.

Property Details

Go to Property List

LOA\_Comm\_Scenario14 ◀ ▶ LOA\_Res\_Scenario4

LOA\_Comm\_Scenario15

Request Type Aggregated Recurring  
Benchmarking Period 1/1/2017 - 5/31/2018

Ave San Diego, CA 92105-8025 US  
Portfolio Manager Property ID: 60  
Building Type: Other Services

<input checked="" type="checkbox"/>	Meter Number	Energy Type	Service Account	Additional Meter ①	Postal Addresses Served ①
<input checked="" type="checkbox"/>	095	Gas	*****5323	No	1
<input checked="" type="checkbox"/>	096	Gas	*****6770	No	1
<input checked="" type="checkbox"/>	096	Gas	*****4506	No	1
<input checked="" type="checkbox"/>	096	Gas	*****3160	No	1
<input type="checkbox"/>	132			No	1
<input checked="" type="checkbox"/>	657	Electric	*****4506	No	1
<input type="checkbox"/>	669			No	1
<input type="checkbox"/>	669			No	1
<input type="checkbox"/>	669			No	1
<input checked="" type="checkbox"/>	622	Gas	*****5024	Yes	1

## 9. How to Add Secondary Property to A Primary Property

1. Click the Add icon to begin

**Note: All properties associated with Portfolio Manager User Name will be auto-selected (with the exception of those that have an unverified address and/or are not a covered building).**

I have read and agree with the Terms and Conditions.

[Retrieve Shared Properties](#)

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

Property Name ⓘ	Portfolio Manager Property ID	Address ⓘ	Request Type	Verified Address?	Meters ⓘ
<input checked="" type="checkbox"/> LOA_Comm_Scenario14 + ⓘ	60271	India St Ste 100 San Diego, CA 92101-1766 US	Aggregated	Yes	1/1
<input checked="" type="checkbox"/> LOA_Comm_Scenario15 +	6066	University Ave San Diego, CA 92105-8025 US	Aggregated	Yes	6/6
<input type="checkbox"/> LOA_Res_Scenario4 + <span>Not a covered building ⓘ</span>	6025	India St Apt 1 San Diego, CA 92101-1762 US	Aggregated	Yes	0/2
<input type="checkbox"/> LOA_Res_Scenario5 +	6025	Adams Ave # 164 San Diego, CA 92116-1504 US	Aggregated	No	0/0
<input checked="" type="checkbox"/> LOA_Res_Scenario8 +	6025	Adams Ave Ste A San Diego, CA 92116-2405 US	Aggregated	Yes	1/1
<input type="checkbox"/> LOA_Res_Scenario9 + <span>Not a covered building ⓘ</span>	6025	30th St Apt 1 San Diego, CA 92102-2355 US	Aggregated	Yes	0/2
<input type="checkbox"/> LOA_res_Scenario7 + <span>Not a covered building ⓘ</span>	6025	30th St Apt B San Diego, CA 92104-5535 US	Aggregated	Yes	0/1

All Shared Properties Retrieved

[<< Back](#) [Next >>](#)

### 9.1 Enter Street Address, ZIP code & Search

6294664 04 Shelter Island Dr San Diego, CA 92109 US

#### Add Property

**Search**

**Street Address**  
8330 Century Park Court

**Unit**

**City**

**State**

**Zip** ⓘ  
92123

[Search](#) [Clear](#)

[Add](#) [Cancel](#)

## 9.2 System Performs Search of Address

**Add Property**

**Search**

**Street Address**  
8330 Century Park Ct

**City**  
San Diego

**Unit**  
[ ]

**Zip**  
92123

Searching Utility Addresses...

Add Cancel

## 9.3 Select Address, Enter Building Name & Add

**Add Property**

**Search**

**Street Address**  
8330 Century Park Ct

**City**  
San Diego

**State**  
ca

**Zip**  
92123

Unit [ ]

Search Clear

**Search Results**

<input type="checkbox"/>	Address	Property Name
<input checked="" type="checkbox"/>	8330 CENTURY PARK CT SAN DIEGO, CA 92123-1530	Building 2

Add Cancel

## 9.4 Click to select the Secondary Property Added under Primary Primary Property

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

Property Name	Portfolio Manager Property ID	Address	Request Type	Verified Address?	Meters
<input checked="" type="checkbox"/> LOA_Comm_Scenario14		100 La Jolla Village Dr San Diego, CA 92161-1766 US	Aggregated	Yes	1/1
<input type="checkbox"/> Building 2		100 CENTURY PARK CT SAN DIEGO, CA 92123-1530 US		Yes	0/3
<input checked="" type="checkbox"/> LOA_Comm_Scenario15		100 University Ave San Diego, CA 92105-8025 US	Aggregated	Yes	6/6
<input type="checkbox"/> LOA_Res_Scenario4		100 La Jolla St Apt 1 San Diego, CA 92101-1762 US	Aggregated	Yes	0/2
<input type="checkbox"/> LOA_Res_Scenario5		100 Adams Ave # 164 San Diego, CA 92116-1504 US	Aggregated	No	0/0
<input checked="" type="checkbox"/> LOA_Res_Scenario8		100 Adams Ave Ste A San Diego, CA 92116-2405 US	Aggregated	Yes	1/1
<input type="checkbox"/> LOA_Res_Scenario9		100 10th St Apt 1 San Diego, CA 92102-2355 US	Aggregated	Yes	0/2
<input type="checkbox"/> LOA_res_Scenario7		100 10th St Apt B San Diego, CA 92104-5535 US	Aggregated	Yes	0/1

## 10. How to Associate a Verified Address to an Unverified Property

### 1. Click the **Address**

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

Property Name	Portfolio Manager Property ID	Address	Request Type	Verified Address?	Meters
<input checked="" type="checkbox"/> LOA_Comm_Scenario14		100 La Jolla Village Dr San Diego, CA 92161-1766 US	Aggregated	Yes	1/1
<input type="checkbox"/> Building 2		100 CENTURY PARK CT SAN DIEGO, CA 92123-1530 US		Yes	0/3
<input checked="" type="checkbox"/> LOA_Comm_Scenario15		100 University Ave San Diego, CA 92105-8025 US	Aggregated	Yes	6/6
<input type="checkbox"/> LOA_Res_Scenario4		100 La Jolla St Apt 1 San Diego, CA 92101-1762 US	Aggregated	Yes	0/2
<input type="checkbox"/> LOA_Res_Scenario5		100 Adams Ave # 164 San Diego, CA 92116-1504 US	Aggregated	No	0/0
<input checked="" type="checkbox"/> LOA_Res_Scenario8		100 Adams Ave Ste A San Diego, CA 92116-2405 US	Aggregated	Yes	1/1
<input type="checkbox"/> LOA_Res_Scenario9		100 10th St Apt 1 San Diego, CA 92102-2355 US	Aggregated	Yes	0/2
<input type="checkbox"/> LOA_res_Scenario7		100 10th St Apt B San Diego, CA 92104-5535 US	Aggregated	Yes	0/1

## 10.1 Search for Premise Address

Enter Street Address, ZIP Code & Search

The image shows a software interface with a dialog box titled "Associate Premise". The dialog is overlaid on a background window titled "Associated Premises". The "Associate Premise" dialog has a "Search" section with the following fields:

- Street Address:** A text input field containing "3 adams".
- Unit:** An empty text input field.
- City:** An empty text input field.
- State:** An empty text input field.
- Zip:** A text input field containing "92116".

Below the search fields are two buttons: "Search" and "Clear". At the bottom right of the dialog are two buttons: "Associate" and "Cancel". Red boxes highlight the "Search" section, the "Zip" field, and the "Search" button.



## 10.2 Select Address From Search Results List & Add

agree with the Terms and Conditions.

### Associate Premise

#### Search

Street Address	Unit	
<input type="text" value="adams"/>	<input type="text"/>	
City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text" value="92116"/>

#### Search Results

<input type="checkbox"/>	Address
<input type="checkbox"/>	ADAMS AVE SAN DIEGO, CA 92116-1504
<input type="checkbox"/>	ADAMS AVE, Unit: 1 SAN DIEGO, CA 92116-1504
<input type="checkbox"/>	ADAMS AVE, Unit: 2 SAN DIEGO, CA 92116-1504
<input type="checkbox"/>	ADAMS AVE, Unit: 3 SAN DIEGO, CA 92116-1504
<input type="checkbox"/>	ADAMS AVE, Unit: 4 SAN DIEGO, CA 92116-1504
<input type="checkbox"/>	ADAMS AVE, Unit: 5 SAN DIEGO, CA 92116-1504
<input checked="" type="checkbox"/>	ADAMS AVE, Unit: 6 SAN DIEGO, CA 92116-1504
<input type="checkbox"/>	ADAMS AVE, Unit: HM SAN DIEGO, CA 92116-1504
<input type="checkbox"/>	ADAMS AVE, Unit: TP SAN DIEGO, CA 92116-1502

### 10.3 Premise is Associated

Property Name <sup>i</sup> Portfolio Manager Property ID Address <sup>i</sup> Reque

**Associated Premises**

LOA\_Res\_Scenario5

Adams Ave # 164 San Diego, CA 92116-1504 US

Portfolio Manager Property ID: [REDACTED]

Address	Meters
<input type="checkbox"/> [REDACTED] ADAMS AVE, Unit: 6 SAN DIEGO, CA 92116-1504	2

Add Association Remove **Close**

All Shared Properties Retrieved

### 10.4 Click Next

**Note: Addresses Associated to the Primary Property from Portfolio Manager in a previous request can be viewed and added here as needed.**





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

Property Name <sup>i</sup>	Portfolio Manager Property ID	Address <sup>i</sup>	Request Type	Verified Address?	Meters <sup>i</sup>
<input type="checkbox"/> ABC College <sup>+</sup>	63846	Walter Island Dr San Diego, CA 92999 US	Aggregated	No	0/0
<input checked="" type="checkbox"/> LOA_Comm_Scenario14 <sup>+</sup>	60276	India St Ste 100 San Diego, CA 92101-1766 US	Aggregated	Yes	1/1
<input checked="" type="checkbox"/> LOA_Comm_Scenario15 <sup>+</sup>	60663	University Ave San Diego, CA 92105-8025 US	Aggregated	Yes	6/6
<input type="checkbox"/> LOA_Res_Scenario4 <sup>+</sup>	[REDACTED] <sup>i</sup>	India St Apt 1 San Diego, CA 92101-1762 US	Aggregated	Yes	0/2
<input checked="" type="checkbox"/> LOA_Res_Scenario5 <sup>+</sup>	[REDACTED] <sup>i</sup>	Adams Ave # 164 San Diego, CA 92116-1504 US	Aggregated	Yes	2/2
<input checked="" type="checkbox"/> LOA_Res_Scenario8 <sup>+</sup>	60254	Adams Ave Ste A San Diego, CA 92116-2405 US	Aggregated	Yes	1/1
<input type="checkbox"/> LOA_Res_Scenario9 <sup>+</sup>	[REDACTED] <sup>i</sup>	30th St Apt 1 San Diego, CA 92102-2355 US	Aggregated	Yes	0/2
<input type="checkbox"/> LOA_res_Scenario7 <sup>+</sup>	[REDACTED] <sup>i</sup>	30th St Apt B San Diego, CA 92104-5535 US	Aggregated	Yes	0/1
<input checked="" type="checkbox"/> Skyline Apartments <sup>+</sup>	63853	Paradise Valley Rd Spring Valley, CA 91977-5700 US	Aggregated	Yes	19/19

All Shared Properties Retrieved

<< Back **Next >>**

## 10.5 Click Next

3580 Adams Ave Ste A San Diego, CA 92116-2405 US	Aggregated	Yes	1/1	
1120 30th St Apt 1 San Diego, CA 92102-2355 US	Aggregated	Yes	0/2	
2034 30th St Apt B San Diego, CA 92104-5535 US	Aggregated	Yes	0/1	
8517 Paradise Valley Rd Spring Valley, CA 91977-5700 US	Aggregated	Yes	19/19	

Properties Retrieved

<< Back
Next >>

## 11. Customer Authorization

If account number, meter number and amount last billed information is available, Click **Property Name** to Enter Meter Trio Data

*Letters of Authorization are signed by the account holder and allows SDG&E to share usage data with authorized Third Parties.*

To obtain aggregated usage data for your Benchmarking Request, a *Letter of Authorization* will be required for the following meters/service accounts listed below.

If you have access to the account number, meter number and last billed amount, you may be able to validate each account below and will not be required to submit a *Letter of Authorization*.

If a *Letter of Authorization* is required and you do not have access to utility information, a request will be generated and sent automatically when Benchmarking Request is submitted.

If no meters are listed below, no authorizations are required and you may proceed to Step 5.

Property Name	Portfolio Manager Property ID	Address	Request Type	# of Accounts Requiring Auths
LOA_Comm_Scenario14		India St Ste 100 San Diego, CA 92101-1766 US	Aggregated	4
LOA_Comm_Scenario15		University Ave San Diego, CA 92105-8025 US	Aggregated	1
LOA_Res_Scenario8		Adams Ave Ste A San Diego, CA 92116-2405 US	Aggregated	1

<< Back
Next >>

## 11.1 Validate Account - Enter Meter Trio Data (if available)

If a Letter of Authorization is required and you do not have access to utility information, a request will be generated and sent automatically when Ben

**Property Details**

Go to Property List ▶ LOA\_Comm\_Scenario15

**LOA\_Comm\_Scenario14** **Request Type:** Aggregated Recurring  
**Benchmarking Period:** 1/1/2017 - 5/31/2018

2159 India St Ste 100 San Diego, CA 92101-1766 US  
**Portfolio Manager Property ID:** 6027605  
**Building Type:** College University

Service Account	Energy Received - From	Energy Received - To	Energy Type	
*****7766	6/19/2017	5/31/2018	Electric	<input checked="" type="checkbox"/>
*****3249	6/19/2017	5/31/2018	Electric	<input checked="" type="checkbox"/>
*****3440	1/1/2017	5/31/2018	Electric	<input checked="" type="checkbox"/>
*****8773	6/19/2017	5/31/2018	Electric	<input checked="" type="checkbox"/>

## 11.2 Validate Account - Enter Meter Trio Data (if available)

Scenario14 ▶

San Diego, CA 92101-1766  
**Property ID:** 6027605  
 University

**Validate Account** ✕

1. Account Number  !

2. Meter Number  !

3. Last Amount Billed  \$ !

Energy Received - To	Energy Type
/31/2018	Electric
/31/2018	Electric
/31/2018	Electric
6/19/2017	5/31/2018

## 11.3 Review & Submit Request

**Step 4:**  
Customer Authorization

**Step 5:**  
Review and Submit

**Step 6:**  
Confirmation

**Requestor Business Address**  
8335 Century Park Ct  
San Diego, CA 92123-1569

**Additional Information**  
**Delivery Method:** Portfolio Manager

**Building Information**

Property Name	Portfolio Manager Property ID	Address	Request Type	Verified Address?	Meters
LOA_Comm_Scenario14	6027	India St Ste 100 San Diego, CA 92101-1766 US	Aggregated	Yes	1/1
LOA_Comm_Scenario15	6066	University Ave San Diego, CA 92105-8025 US	Aggregated	Yes	6/6
LOA_Res_Scenario8	6025	Adams Ave Ste A San Diego, CA 92116-2405 US	Aggregated	Yes	1/1

<< Back Submit

## 11.4 Request Submitted

Your request number is: **10833717**.

Here's what you can expect:

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


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

## 11.5 Request Information Downloaded

Do you want to open or save **Application-10833717-201806171243.pdf** (113 KB) from [sdge-eecp-ua.directtechnology.com](http://sdge-eecp-ua.directtechnology.com)?

Open Save Cancel

## 11.6 Request Information Download - Maintain for your records



A Sempra Energy utility™

### AB802 Benchmarking

---

Enrollment Number: 10833717      Application Date: 6/17/2018

#### Requestor Information

---

Requestor Business Address: 8335 Century Park Ct San Diego CA 92123-1569      Mailing Address: 8335 Century Park Ct San Diego CA 92123-1569

Delivery Method: Portfolio Manager

#### Requestor Details

First Name: First      Last Name: Last  
 Primary Phone: (999) 999-9999      Fax: \_\_\_\_\_  
 Alternate Phone: \_\_\_\_\_      Email: \_\_\_\_\_

#### Additional Information

---

Organization : \_\_\_\_\_

#### Building Information

---

LOA_Res_Scenario8	Request Type	Benchmarking Period
<u>_____ Ave, Unit: Ste A San Diego, CA 92116-2405</u>	Aggregated   Recurring	01/01/2017 - 05/31/2018
Portfolio Manager Property ID: _____		
Building Type: Multifamily Housing		

Meter Number	Energy Type	Service Account	Postal Addresses Serviced?
_____	Electric	*****4936	1

Service Account	Energy Received From	Energy Received To	Energy Type
*****4936	1/1/2017	5/31/2018	Electric

LOA_Comm_Scenario14	Request Type	Benchmarking Period
<u>_____ St, Unit: Ste 100 San Diego, CA 92101-1766</u>	Aggregated   Recurring	01/01/2017 - 05/31/2018
<u>_____ ST, Unit: 100A SAN DIEGO, CA 92101-1766</u>	Aggregated   Recurring	01/01/2017 - 05/31/2018
Portfolio Manager Property ID: _____		
Building Type: College University		

Meter Number	Energy Type	Service Account	Postal Addresses Serviced?
064_____	Electric	*****3249	1
622_____	Electric	*****7766	1
648_____	Electric	*****8773	1
651_____	Electric	*****3440	1

## 12. Status Check

1. Enter **Benchmarking Request Number**

2. **Search**

#### Benchmarking Request Status Check

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

✕
!

Search
!

## 12.1 Click Property Name to Enter Meter Trio Data

Account number, meter number and Last billed amount may be entered on the status check to

Benchmarking Request Number - 10833718 Back to Validation Screen

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

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

Property Name	Portfolio Manager Property ID	Address	Request Type	Verified Address?	Meters	Auth Required
LOA_Comm_Scenario14	6027605	2159 India St, Unit: Ste 100 San Diego, CA 92101-1766	Aggregated	Yes	1/1	Yes
LOA_Comm_Scenario15	6066361	5348 University Ave San Diego, CA 92105-8025	Aggregated	Yes	6/6	Yes
LOA_Res_Scenario8	6025419	3580 Adams Ave, Unit: Ste A San Diego, CA 92116-2405	Aggregated	Yes	1/1	Yes

## 12.2 Click to enter Meter Trio Data



**Property Details**

[Go to Property List](#) ▶ LOA\_Comm\_Scenario15

LOA\_Comm\_Scenario14 **Request Type:** Aggregated Recurring  
**Benchmarking Period:** 1/1/2017 - 5/31/2018

2159 India St, Unit: Ste 100 San Diego, CA 92101-1766 **Building Status:** Awaiting Auth

**Portfolio Manager Property ID:** 6027605  
**Building Type:** College University

Service Account	Energy Received - From	Energy Received - To	Usage Uploaded	Energy Type	Auth Required?	
*****3249	6/19/2017	5/31/2018		Electric	Yes	

### 12.3 Enter Meter Trio Data

**Note: Enter 10 digit numeric account number, numeric meter number and last billed amount.**

**Validate Account**

1. Account Number
2. Meter Number
3. Last Amount Billed

OK Cancel

### 12.4 Update Deliver Method (as needed) & Submit Changes

Service Account	Energy Received - From	Energy Received - To	Usage Uploaded	Energy Type	Auth Required?	
*****3249	6/19/2017	5/31/2018		Electric	Yes	

Delivery Method: Portfolio Manager