



**ENERGY STAR®**

# SDG&E® Benchmarking Data Request Portal User Guide

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

March 2020



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

Cite this reference as Baptiste, R. S., 2020, SDG&E® Benchmarking Data Request Portal User Guide, Center for Sustainable Energy.

The City of San Diego Partnership is administered by the Center for Sustainable Energy and funded by San Diego Gas & Electric® (SDG&E®) customers under the auspices of the California Public Utilities Commission. © 2020 Center for Sustainable Energy. Trademarks are property of their respective owners. All rights reserved.

# CONTENTS

<b>Introduction.....</b>	<b>2</b>
Portfolio Manager Overview.....	2
Additional Resources.....	3
<b>Preparing To Submit Your Request .....</b>	<b>4</b>
STEP 1: Setting up your Property in Portfolio Manager.....	4
STEP 2: Connecting with SDG&E in Portfolio Manager .....	4
<b>Benchmarking Data Request Portal .....</b>	<b>10</b>
STEP 1: Getting Started.....	11
STEP 2: Requestor Information .....	12
STEP 3: Building Information.....	13
STEP 3A: Setting Up Data Request Parameters .....	13
STEP 3B: Selecting Properties and Meters to Include in Request.....	16
STEP 4: Customer Authorization .....	20
STEP 5: Review and Submit.....	22
STEP 6: Confirmation .....	22
STEP 7: Checking the Status of Your Request .....	24

# INTRODUCTION

## Portfolio Manager Overview

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

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

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

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

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

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

#### Benchmarking

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

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

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

#### Getting Started

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

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

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

## Additional Resources

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

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

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

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

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

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

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

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

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

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

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

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

## PREPARING TO SUBMIT YOUR REQUEST

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

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

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

## ADD SDG&E AS A CONTACT

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

**A. Add the “SDGE Benchmarking” account to your contacts in Portfolio Manager.**

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

## 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: SDGE Benchmarking

Organization:

Username:

Email Address:

Search

SDGE Benchmarking  
SDGE Benchmarking Web Service with SDGE

Connect

<< < Page 1 of 1 > >>

1 - 1 of 1

**i Tip**

Can't find what you are looking for? Try adjusting your search criteria.

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

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

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

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

Meter Selection: 01234567 - 63127823

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

Name: \* 01234567

[Delete Meter](#)

Meter ID: 63127823

Type: Electric - Grid [Need to change?](#)

Units: \* kWh (thousand Watt-hours)

Date Meter became Active: \* 01/01/2018

☒ Still In Use

Date Meter became Inactive:

Custom Meter IDs None [+ Add Another Custom Meter ID](#)

**Save Changes**



**C. Submit a share request for all buildings and meters that require benchmarking.**

1. Navigate to the **SHARING** tab in your Portfolio Manager account and click **SHARE (OR EDIT ACCESS TO) A PROPERTY**.
2. Select the property or properties to share.
  - i. You can choose to share one, multiple or all properties.
3. Select the People (Accounts) you want to share your property/properties with.
  - i. Choose **SDGE BENCHMARKING (SDGE)**.
4. Select the **PERSONALIZED SHARING** option to allow for data exchange and click **CONTINUE**.



# 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.

## 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?

One Property ▼ Test Property 1 ▼

## 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)

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 and 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

## 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 "Contacts" page and search for them under "Add Contact" or "Add Organization" (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. When 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?

**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.



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

### Share Your Property(ies)

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

4

#### Select Permissions for Each Contact

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

Sort by: Property Name ▾

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

Share Property(ies)

[Cancel](#)

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.

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

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

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

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

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

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

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

**Additional Options:**

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

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

Follow Us [Facebook](#) [Twitter](#) [LinkedIn](#) [YouTube](#) [Contact Us](#) [Privacy Policy](#) [Browser Requirements](#) [ENERGY STAR Buildings & Plants Website](#)

8. Click **SHARE PROPERTIES**.

The screenshot shows the 'Share Your Property(ies)' page in the 'MyPortfolio' application. The 'Sharing' tab is active. The page title is 'Share Your Property(ies)'. Below the title, there is a sub-header 'Select Permissions for Each Contact' with a number '4' and a gear icon. The text says: '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.' To the right, there is a section titled 'Who gets to Share Forward?' with a 'NEW' star icon. It lists three options: 'Full Access' (includes 'Share Forward' rights), 'Read Only' (does NOT include 'Share Forward' rights), and 'Custom' (you decide, along with individual permissions for property, meter, goals and recognition permissions). Below this, there is an 'Exchange Data' option (you decide, along with individual permissions for property, meter, goals and recognition permissions). A 'Sort by:' dropdown menu is set to 'Property Name'. Below this is a table with columns: 'Name (ID)', 'No Access', 'Read Only Access', 'Full Access', 'Custom Access', and 'Exchange Data'. The table has one row for 'Test Property 1 (6016668)' with a sub-row for 'SDGE Benchmarking'. The 'Full Access' column for 'SDGE Benchmarking' has a radio button selected. At the bottom right of the table, there is a 'Share Property(ies)' button (highlighted with a red box) and a 'Cancel' button. At the bottom of the page, there are social media links (Follow Us) and a footer with links: 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

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

The screenshot shows the 'MyPortfolio' application after a successful share. A green message box (highlighted with a red box) at the top says: '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 the message box, there are two sections. On the left, 'My Shared Properties (9)' has three buttons: 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. On the right, 'Sharing Notifications (1)' shows a notification for 'Test Property 1 - Sharing request sent to SDGE Benchmarking' with 'Cancel' and 'Clear' buttons.

# BENCHMARKING DATA REQUEST PORTAL

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

## Benchmarking

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

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

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

## Getting Started

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

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

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

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

# STEP 1: Getting Started

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

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

The screenshot shows the 'Step 1: Getting Started' page of the SDG&E Benchmarking Data Request Portal. On the left is a vertical sidebar with a list of steps: Step 1 (Getting Started), Step 2 (Requestor Information), Step 3 (Building Information), Step 4 (Customer Authorization), Step 5 (Review and Submit), and Step 6 (Confirmation). Step 1 is highlighted with a blue arrow. The main content area has the heading 'Welcome to SDG&E's Benchmarking Data Request Portal' and a subheading 'Please follow the steps to complete and submit your request. You will need the following information to continue:'. Below this is a text input field for 'ENERGY STAR Portfolio Manager Username' with a link to view the User Guide. A 'Let's get started...' link is also present. A red circle with an exclamation mark icon is next to the instruction 'Indicate who is completing this application:'. Below this 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 an exclamation mark icon is also next to the 'Other' option. At the bottom right is a 'Next >>' button.

**Step 1:**  
Getting Started

Step 2  
Requestor Information

Step 3  
Building Information

Step 4  
Customer Authorization

Step 5  
Review and Submit

Step 6  
Confirmation

## Welcome to SDG&E's Benchmarking Data Request Portal

Please follow the steps to complete and submit your request. You will need the following information to continue:

. **ENERGY STAR Portfolio Manager Username** (Need help? Click [here](#) view the User Guide)

Let's get started...

**Indicate who is completing this application:**

- ☐ I am the building owner
- ☐ I am the building owner's agent
- ☐ I am the SDG&E account holder
- ☐ Other (please enter name & title below)

**Next >>**

## STEP 2: Requestor Information

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

Step 1:  
Getting Started

Step 2:  
Requestor Information

Step 3:  
Building Information

Step 4:  
Customer Authorization

Step 5:  
Review and Submit

Step 6:  
Confirmation

### Requestor Information

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

#### Requestor Details

First Name:

John

Last Name:

Doe

Primary Phone:

(619) 555-1212

Alt Phone:

Fax:

Email:

john.doe@google.com

#### Requestor Business Address

Street:

Sherman St ✓

Unit:

ZIP / Postal Code:

92110-4313

City:

San Diego

State:

CA

#### Mailing Address

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

#### Additional Information

Organization:

Acme, Inc.

<< Back

Next >>



# STEP 3: Building Information

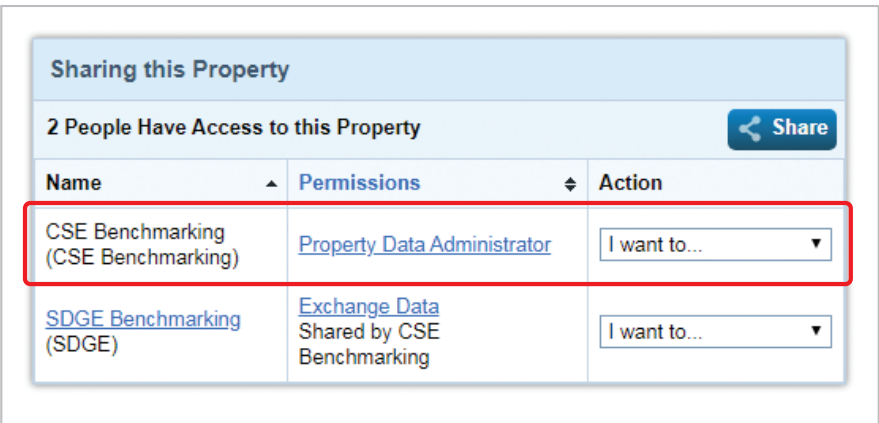
## STEP 3A: Setting Up Data Request Parameters

- 1. Enter the Portfolio Manager Username.

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

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

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



Sharing this Property		
2 People Have Access to this Property		
Name	Permissions	Action
CSE Benchmarking (CSE Benchmarking)	Property Data Administrator	I want to...
SDGE Benchmarking (SDGE)	Exchange Data Shared by CSE Benchmarking	I want to...

- 2. Select the Request Type

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

- 3. Select Frequency.
  - a. **Recurring** – Uploads will continue on a monthly basis until canceled.
  - b. **One-Time** – There will be a one-time upload of the requested data.
- 4. Select Delivery Method.
  - a. Portfolio Manager – SDG&E’s system will upload data directly to your property in Portfolio Manager.
  - b. Download – An Excel spreadsheet of your data will be generated.
- 5. To read the “Terms and Conditions,” click the “Terms and Conditions” link (required to proceed).
- 6. Check the box to affirm you have read and agree to the terms and conditions.

## 7. Click **RETRIEVE PROPERTIES**.

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

Step 1:  
Getting Started

Step 2:  
Requestor Information

Step 3:  
Building Information

Step 4:  
Customer Authorization

Step 5:  
Review and Submit

Step 6:  
Confirmation

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

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

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

Portfolio Manager Information

Portfolio Manager Username:  
CSE Benchmarking

Request Type/Frequency:  
Aggregated Recurring

Delivery Method:  
Portfolio Manager

☒ I have read and agree with the Terms and Conditions.

Retrieve Shared Properties

<< BackNext >>

Step 1:  
Getting Started

Step 2:  
Requestor Information

Step 3:  
Building Information

Step 4:  
Customer Authorization

Step 5:  
Review and Submit

Step 6:  
Confirmation

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

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

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

Portfolio Manager Information

Portfolio Manager Username:  
CSE Benchmarking


Request Type/Frequency:  
Aggregated Recurring

Delivery Method:  
Portfolio Manager

☒ I have read and agree with the Terms and Conditions.

Retrieve Shared Properties

Retrieving Shared Properties from Portfolio Manager



Finalizing Records...

<< BackNext >>

## DATA REQUESTS

### A. AGGREGATED DATA REQUESTS

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

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

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

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

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

### B. NONAGGREGATED DATA REQUESTS

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

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

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

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

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

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

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

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

Portfolio Manager Information

Portfolio Manager Username: CSE Benchmarking

Request Type/Frequency: Aggregated Recurring

Delivery Method: Portfolio Manager

☒ I have read and agree with the Terms and Conditions.

[Retrieve Shared Properties](#)

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

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

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



## Service Addresses for Multifamily Properties

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

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

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

The "Associated Premises" dialog box shows the "Test Office Property" with the address "Sherman St San Diego, CA 92110-4313 US" and "Portfolio Manager Property ID: 9132173". Below this is a table with two columns: "Address" and "Meters".

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

At the bottom are buttons for "Add Association", "Remove", and "Close".

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

The "Associate Premise" dialog box has a "Search" section with fields for "Street Address" (containing "Sherman"), "Unit", "City", "State", and "Zip" (containing "92110"). There are "Search" and "Clear" buttons. Below is a "Search Results" section with a table:

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

At the bottom are "Add" and "Cancel" buttons.

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

**Associated Premises**

Test Office Property

Sherman St San Diego, CA 92110-4313 US  
Portfolio Manager Property ID: 9132173

	Address	Meters
<input type="checkbox"/>	SHERMAN ST SAN DIEGO, CA 92110-4313	2
<input type="checkbox"/>	SHERMAN ST, Unit: 170 SAN DIEGO, CA 92110-4314	1
<input type="checkbox"/>	SHERMAN ST SAN DIEGO, CA 92110-4324	1

Add Association Remove **Close**

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

**Note**

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

**Property Details**

Go to Property List

Test Office Property

Request Type: Aggregated Recurring  
Benchmarking Period: 1/1/2018 - 10/31/2019


Sherman St San Diego, CA 92110-4313 US  
Portfolio Manager Property ID: 9132173  
Building Type: Office

<input checked="" type="checkbox"/>	Meter Number	Energy Type	Service Account	Additional Meter	Postal Addresses Served
<input checked="" type="checkbox"/>	988			Yes	1
<input checked="" type="checkbox"/>	945	Electric	*****6660	Yes	1
<input checked="" type="checkbox"/>	794	Electric	*****5905	Yes	1
<input checked="" type="checkbox"/>	797	Electric	*****5930	Yes	1



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

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

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

All Shared Properties Retrieved

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

# STEP 4: Customer Authorization

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

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

Do the following to verify individual meters.

1. Click on the Property Name.

Step 1:  
Getting Started

Step 2:  
Requestor Information

Step 3:  
Building Information

Step 4:  
Customer Authorization

Step 5:  
Review and Submit

Step 6:  
Confirmation

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, Letter(s) 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 don't 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	Number of Accounts Requiring Authorization
Test Office Property	9132173	Sherman St San Diego, CA 92110-4313 US	Aggregated	2

<< BackNext >>

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

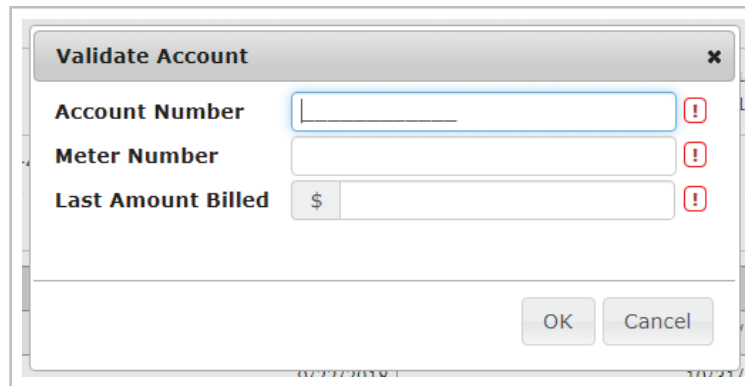
Go to Property List

Test Office Property

Request Type: Aggregated Recurring  
Benchmarking Period: 1/1/2018 - 10/31/2019

Sherman St San Diego, CA 92110-4313 US  
Portfolio Manager Property ID: 9132173  
Building Type: Office

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



**Validate Account**

Account Number

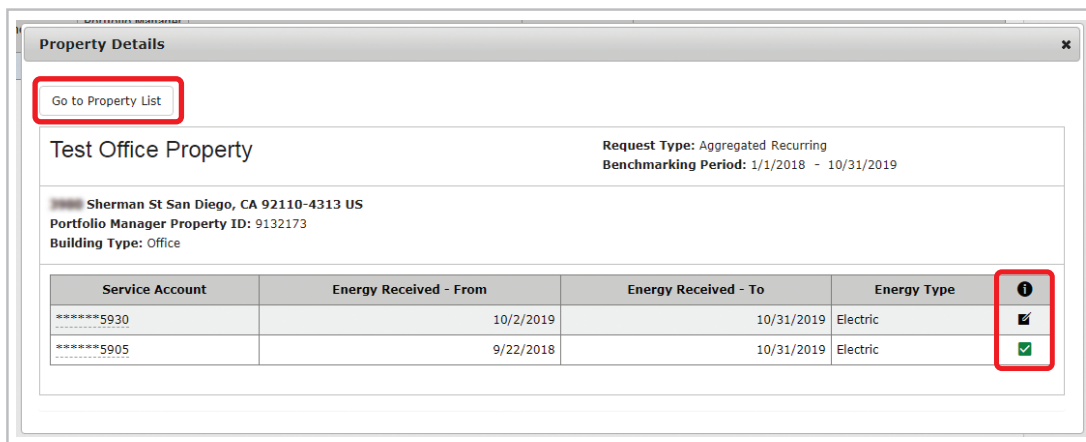
Meter Number

Last Amount Billed \$

OK Cancel

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

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



**Property Details**

[Go to Property List](#)

**Test Office Property** Request Type: Aggregated Recurring  
Benchmarking Period: 1/1/2018 - 10/31/2019

**Sherman St San Diego, CA 92110-4313 US**  
**Portfolio Manager Property ID: 9132173**  
**Building Type: Office**

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

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

## STEP 5: Review and Submit

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

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

Step 1:  
Getting Started

Step 2:  
Requestor Information

Step 3:  
Building Information

Step 4:  
Customer Authorization

Step 5:  
Review and Submit

Step 6:  
Confirmation

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

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

**Requestor Details**

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

**Requestor Business Address**

Sherman St  
San Diego, CA 92110-4313

**Additional Information**

Organization: Acme, Inc.  
Delivery Method: Portfolio Manager

**Building Information**

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

<< Back Submit

## STEP 6: Confirmation


Your request number is: 11006359.

Here's what you can expect:



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

Application-11006...pdf Show all X



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

## AB802 Benchmarking

---

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

### Requestor Information

---

Requestor Business Address: Sherman St  
San Diego CA 92110-4313      Mailing Address: Sherman St  
San Diego CA 92110-4313

Delivery Method: Portfolio Manager

### Requestor Details

First Name: John      Last Name: Doe

Primary Phone: (619) 555-1212      Fax:

Alternate Phone:      Email: john.doe@google.com

### Additional Information

---

Organization: Acme, Inc.

### Building Information

---

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

Portfolio Manager Property ID: 9132173

Building Type: Office

Meter Number	Energy Type	Service Account	Postal Addresses Serviced?
794	Electric	*****5905	1
8945	Electric	*6660	1
797	Electric	*****5930	1

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

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

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

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

## STEP 7: Checking the Status of Your Request

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

### Benchmarking

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

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

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

### Getting Started

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

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

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

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

### Benchmarking Request Status Check

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

**Search**



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

Benchmarking Request Number - 11006359


[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
<a href="#">Test Office Property</a>	9132173	 Sherman St San Diego, CA 92110-4313	Aggregated	Yes	3/3

Delivery Method:  Portfolio Manager

Submit



Center for  
Sustainable  
Energy™

---

**One simple mission — DECARBONIZE.™**

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

[EnergyCenter.org](http://EnergyCenter.org)