

**BESO Large Buildings (over 25,000 ft2):**

## **How to Submit a 2018 Energy Benchmark**

PG&E's service which transfers energy usage data to ENERGY STAR Portfolio Manager suffered from a software glitch that replaced electricity and natural gas use for some billing cycles in 2017 and 2018 with an erroneous value of zero ("0").

Building owners are required by law to submit accurate and complete energy benchmark data. Therefore the City of Berkeley is continuing to require building owners to check for and correct any incorrect data - though the building owner is always responsible for accuracy of benchmark reports, the process is slightly more detailed in order to help you carefully screen for incorrect energy use data before submitting a 2018 Annual Energy Benchmark Summary.

This guide is for building owners or representatives with an existing ENERGY STAR Portfolio Manager account. If you do not have an ENERGY STAR Portfolio Manager account please [setup your account](#) before proceeding.

The process required in 2018 is:

**Step 1: Check for Incorrect Data**

**Step 2: Report & Update Incorrect Data**

**Step 3: Confirm Data & Add Parcel Number**

**Step 4: Submit the 2018 Benchmark**

**Benchmark reports that have not followed all of the steps in this guide will be rejected and required to resubmit.**

# Step 1: Check for Incorrect Data

Incorrect energy usage data can be identified by reviewing each month’s energy usage. In Portfolio Manager, look under the “Energy” tab of the building profile, and inspect each entry for every meter. If the energy cost for a given month is similar to other months, but energy use is reported as “0”, a correction is needed.

## 1. Login into Portfolio Manager

- Log into [www.energystar.gov/portfoliomanager.com](http://www.energystar.gov/portfoliomanager.com)
- Click on the Property
- Click on the Energy Tab.



## 2. Review Data for Each Meter in 2018:

- Click on the first meter. (BE sure to add 2017 and 2018 to the “display years”.)
- Check each entry for each month. If the total cost of energy used in a given month is similar to other months, but energy use is reported as “0”, a correction is needed. For example:

Basic Meter Information

Monthly Entries

Display Year(s) 2018 x 2017 x

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Updated
<input type="checkbox"/>	12/22/2016	1/23/2017	349				434.11		3/22/2017 <a href="#">Pacific Gas and Electric Company</a>
<input type="checkbox"/>	1/23/2017	2/23/2017	244				305.58		3/22/2017 <a href="#">Pacific Gas and Electric Company</a>
<p>31351683 --Admin. Gas has a gap of 28 days between the dates of 02/23/2017 and 03/24/2017. Please confirm this is correct or remove the gap by adjusting the dates per your meter entries and saving your changes. For more help, see <a href="#">this FAQ</a>.</p>									
<input type="checkbox"/>	3/24/2017	4/25/2017	119				144.32		5/20/2017 <a href="#">Pacific Gas and Electric Company</a>
<input type="checkbox"/>	4/25/2017	5/24/2017	70				87.44		6/21/2017 <a href="#">Pacific Gas and Electric Company</a>

In the example to the left, there is a high cost associated with “0” gas utilization.

You can correct missing bill data by using your paper bills from the month that is missing. Reference the steps on the following page if you do not have the paper bill for the missing month.

It is possible for both gas and electric usage to correctly be “0”. In these cases, the Total Cost is trivial, usually \$20.

## Step 2: Report & Update Incorrect Data

If there is an incorrect “0” value for any given meter, there are three options to correct the problem. If all meter entries have been verified and there are no incorrect zero “0” values proceed to step 3.

### Option 1 – Email PG&E to Update Meter Entry (RECOMMENDED):

This method will ensure that the usage values are updated with the correct information.

Email the PG&E Helpdesk ([benchmarking@pge.com](mailto:benchmarking@pge.com)) and CC the BESO Helpdesk ([BESO@cityofberkeley.info](mailto:BESO@cityofberkeley.info)) with the following information

**Subject:** ENERGY STAR Portfolio Manager Data Correction

**Information to include:** Property Name/Address

Portfolio Manager ID

Portfolio Manager Meter ID for the affected meter (found below the meter name)

If possible, the PG&E Meter #

PGE will manually correct the data for the affected account information. This may take a few days. You must verify that the data has been corrected before submitting the benchmark.

The screenshot shows the MyPortfolio interface for a building named 'Test Building (2120 Milvia)'. The address is 2120 Milvia St., Berkeley, CA 94702. The Portfolio Manager Property ID is 3622872. The building was built in 1963. The interface shows a table of meters used to compute metrics:

Name	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter 6046473	Electric - Grid		Yes
Natural Gas 6046472	Natural Gas	07/22/2013	Yes

Annotations in the image include a red box around the Property ID '3622872' and another red box around the Meter ID '6046473'. Callout boxes on the right side of the image point to these red boxes with the labels 'Portfolio Manager Building ID' and 'Portfolio Manager Meter ID' respectively.

### Option 2 – Unshare & Reshare Meters with PG&E:

This method is suitable for experts, such as benchmark consultants. It requires a few days for data to transfer.

- 1) Open the meter(s) with the incorrect “0” value(s) and select “2017”, “2018”, and “2019” as the “Display Year(s)”.
- 2) Click the “Download to Excel” link and select “All Meter Entries” then Download Excel. This will download an excel file for all meter entries as a back-up so no data will be lost.
- 3) Select all meter entries from the most recent (in 2019) to the first zero value in 2018 or 2017. (Make sure to include all zero values in the selection)
- 4) Click “Delete Selected Entries” and then “Save Bills”
- 5) Use [this guide](#) to perform the unshare/reshare.

### Option 3 – Manually Update the Missing Energy Use Value:

This method is only possible if you have a copy of each monthly PG&E bill for every meter for every month. It is not recommended.

Be sure that each PG&E bill corresponds to the correct billing cycle and the cost for meter matches the “total cost” reported in Portfolio Manager. Manually correct each inaccurate zero “0” value.

## Step 3: Confirm Data & Add Berkeley Building ID

For the 2018 benchmark to be accepted, benchmarks must contain a confirmation that the data has been verified. Additionally, we will also be requiring the Berkeley Building ID to be included with each building submission.

The screenshot shows the 'Details' tab in the Portfolio Manager interface. It is divided into several sections:

- Basic Information:** Construction Status: Existing property that is one single building. Property GFA - Self-Reported: 24,461 Sq. Ft. Occupancy: 100%. There is an 'Edit' button.
- Property Uses and Use Details:** A table with columns: Name, Property Use Type, Gross Floor Area, and Action. It lists 'Building Use' (Multifamily Housing, 24,461 ft²) and 'Parking Use' (Parking, 6,115 ft²). Below the table, it shows 'Property GFA (Buildings): 24,461 (used to calculate EUJ)' and 'Property GFA (Parking): 6,115'. There is an 'Add' button and a 'View as Diagram' link.
- Unique Identifiers (IDs):** Portfolio Manager ID: 3878305. Custom IDs: None. Standard IDs: None. A note explains that users can select from Portfolio Manager's Standard IDs or create up to three Custom IDs. There is an 'Edit' button.
- Property Type:** Property Type - Self-Selected: Multifamily Housing. Property Type -Portfolio Manager-Calculated: Multifamily Housing. A note states that the Portfolio Manager-Calculated Property Type is used for metrics. There is an 'Edit' button.
- Property GFA by Use:** A pie chart showing 'Parking: 20%' and 'Multifamily Hous... 80%'.
- Property Notes:** A text area with the note '2018 Energy Data Verified'. A 'Save Notes' button is at the bottom right.
- Additional Information:** Federal Property: Not Set. Service & Product Provider: None. There is an 'Edit' button.

1) Click on the “Details” tab. Scroll down to Property Notes and write: “2018 energy Data Verified”. **Benchmarks without “2018 Energy Data Verified” in their property notes will be rejected.**

2) Click “Save Notes”

3) Under the “Unique Identifiers (IDs)” box on the left side of the page, click “Edit”

4) In the Standard IDs Box on the bottom of the page, select “Berkeley Building ID”

5) Input the Berkeley Building ID, which can be found on the [Large Building Status List](#).

The screenshot shows the 'Standard IDs' section. It contains a text box with the following text: 'Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.' Below this is a label 'Standard ID(s):' followed by a dropdown menu with 'Berkeley Building ID' selected, an 'ID:' label, and an empty input field. There is an '+ Add Another' button.

## Step 4: Submit the 2018 Benchmark

Once the missing data for each meter has been corrected and verified, submit a 2018 benchmark report [here](#).

### Step 1:

- Open the link: <https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/645218d3-2e7d-4fa0-8a1b-d4590efdcd5f>
- Login to ENERGY STAR Portfolio Manager. If it doesn't directly bring you to the data request, go to the "Reporting" tab, and scroll to the green highlighted row under Templates & Reports. Select "Respond to Data Request" from the dropdown.

Name	Status	Action
Data Request: City of Berkeley - Annual Energy Benchmark Summary for 2017 & 2018 Data (Request from Billi Romain)	Response Preview Generated: 5/07/2019 4:32 PM	I want to...

- Confirm the response is for the 2017 & 2018 Data Request.
- Scroll down to "Your Response" and select the property(ies)
- Click "Generate Response Preview"

**Your Response**

Select Information to Include:

Timeframe: \* Single Year | Dec 31 | 2016

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

Properties: \* One Property | Sample Facility

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

[Generate Response Preview](#) [Cancel](#)

### Step 2:

- Scroll to the green highlighted row under Templates & Reports
- Click the "I want to..." on the row labeled with the 2018 Annual energy Benchmark Summary
- Click "Send Response"

Name	Status	Action
Data Request: City of Berkeley - Annual Energy Benchmark Summary for 2017 & 2018 Data (Request from Billi Romain)	Response Preview Generated: 5/07/2019 4:32 PM	I want to...

### Step 3:

- Scroll to "3. E-Sign the data Response".
- Check the box that says "I hereby certify..."
- Sign in with your username and password
- Click the box that says "E-Sign Response"
- Click "Send Data"

(A popup will ask to confirm the data request, click continue)

**You will receive a confirmation email from the BESO Helpdesk once the benchmark has been approved. Please reach out to the BESO Help Desk if you do not receive an email within 2 weeks.**