

# How to Comply with Benchmarking in San Francisco

Benchmarking is the process of tracking a building's energy use, so you know how its performance compares to similar properties and understand how it's performing over time. By April 1 each year, you must send to SF Environment an "Annual Energy Benchmark Summary" to prove you've benchmarked your building.

PG&E is transitioning from releasing individual meter data to releasing aggregated whole-building data. This process includes a transition to PG&E's [Building Benchmarking Portal](#). PG&E's [How to Benchmark Your Building Guide using PG&E's Building Benchmarking Portal](#) is a great resource for setting up an [Energy Star Property Manager](#) account and a PG&E [Building Benchmarking Portal](#) account.

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## Comply with the Annual Energy Benchmark Summary

If you have already set up an ENERGY STAR Portfolio Manager account please use the following link to comply with the 2020 Energy Benchmark:

Due to a data quality issue with data automatically transferred from PG&E, SF Environment is requiring additional steps to verify your data prior to submitting a benchmark. For instructions on how to verify, correct, and submit your data, please use the following link:

- [2020 Energy Benchmark Summary \(Due April 1, 2021\)](#)

## How to complete an Annual Energy Benchmark Summary

[Step 1: Create a building profile in PG&E's Building Benchmarking Portal](#)

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### Step 1: Create a building profile in PG&E's Building Benchmarking Portal

Register an account in PG&E's [Building Benchmarking Portal](#), then log in and add your building.

- A great resource for completing Steps 1, 2, & 3 is [How to Benchmark Your Building Using PG&E's Building Benchmarking Portal](#) (Current)

#### Resources:

- [PG&E Benchmarking homepage](#) (PG&E)
- [How to Benchmark Your Building Using PG&E's Building Benchmarking Portal](#) (Current)
- [How to Benchmark Your Building](#) (2018 and before)
- [How to Release Data for Benchmarking Guide](#) - Detailed guide to setting up "Web Services" (PDF document, PG&E)
- [PG&E Web Services Data Authorization Form](#) - Applicable to any account, including tenants (PG&E)

- [Help with Benchmarking](#)
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## **Step 2: Create a building profile in Portfolio Manager**

Register an account in [ENERGY STAR Portfolio Manager](#) (Energy Star), then log in and create a profile for your building. You must describe the entire building – all spaces and all energy meters. To comply, you must include all energy meters (common and tenant) and any energy generated on-site.

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## **Step 3: Obtain and input energy data**

After your Portfolio Manager account and building is set up, create new meters and input the monthly energy use data from your utility bills. For PG&E customers, there is an automated process to transfer the data for each of your meters. See instructions below. If you are a San Francisco Public Utilities Commission (PUC) customer, email [energydata@sfwater.org](mailto:energydata@sfwater.org).

### **Transfer PG&E Utility Data Automatically (Recommended)**

With your permission, PG&E will electronically sync energy data with your Portfolio Manager account for free. This free data exchange service saves the trouble of entering your data by hand, and it is the most convenient way for a tenant to share energy use data.

Set up PG&E Portfolio Manager Web Services, using PG&E's [How to Benchmark Your Building Using PG&E's Building Benchmarking Portal](#) (PDF).

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#### **Step 4: Identify your parcel(s)**

Add the Assessor Parcel Number (APN – also known as the block/lot number) to Portfolio Manager's "San Francisco Building ID" field for each of your buildings:

- To look up Assessor Parcel Number(s), use the City's [Property Information Map](#) (SF Planning)
- To add APN(s) to the San Francisco Building ID field in [Portfolio Manager](#) (Energy Star):
  - Go to the My Portfolio tab and click on the property name.
  - In the secondary gray set of tabs, select Details.
  - In the second box on the left, Unique Identifiers (IDs), click Edit.
  - In the Standard IDs dropdown, select San Francisco Building ID.
  - Enter the Assessor Parcel Number(s) in the ID field. For example, the San Francisco Building ID for 1 South Van Ness Ave is: 3506/001.
  - If your building has multiple APNs, please enter all of them, separated with a space.
  - Click Save.

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#### **Step 5: Open the Energy Benchmark Summary template**

An Annual Energy Benchmark Summary is required every year.

**Option 1:** Load a report template for the first time:

- Click the link below for the report you want to submit:

- This year:
  - [2020 Energy Benchmark Summary](#) - Due April 1, 2021
- Past years:
  - [2019 Energy Benchmark Summary](#) - Due July 1, 2020
  - [2018 Energy Benchmark Summary](#) - Due April 1, 2019
  - [2017 Energy Benchmark Summary](#) - Due May 1, 2018
  - [2016 Energy Benchmark Summary](#) - Due April 1, 2017
  - [2015 Energy Benchmark Summary](#) - Due April 1, 2016
  - [2014 Energy Benchmark Summary](#) - Due April 1, 2015
  - [2013 Energy Benchmark Summary](#) - Due April 1, 2014
  - [2012 Energy Benchmark Summary](#) - Due April 1, 2013
  - [2011 Energy Benchmark Summary](#) - Due April 1, 2012
  - [2010 Energy Benchmark Summary](#) - Due October 1, 2011
- Login to Portfolio Manager.

**Option 2:** Return to a template you've previously loaded:

- Login to [Portfolio Manager](#) (Energy Star).
- From "My Portfolio" click on the "Reporting" tab at the top.
- Find the report that you want to generate, and in the "Action" dropdown, select "Respond to Data Request."

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## Step 6: Confirm your data is complete and accurate

- Generate your report:
  - When you complete Step 5, you will land on the "Respond to Data Request" page.
  - In the "About Your Response" box, choose whose contact info you want to attach to your submittal for follow-up.
  - In the "Your Response" box, you will NOT be able to select the timeframe, as that is fixed for each year's Benchmark report.
  - Below the timeframe, choose which properties you wish to release data for.
  - Click the "Generate Response Preview" button.
- Check your data:
  - Once the Response has been generated, on the "Reporting" page the report should be highlighted in green.
  - Portfolio Manager has added a data quality checker that will alert you if information is not entered correctly or if the report is missing data. If there is an error, an alert box will appear on the Reporting Tab and an alert icon is included next to the affected data request.
  - Please review the alerts by clicking "Read More" which will take you to a review page. Please fix all alerts.
  - Next, in the dropdown on the right, select "Download Preview in Excel" so you can check your data once more.

- Open the downloaded file and check to make sure there are no issues in the Energy Alerts or Space Alerts fields. Submittals with these alerts will trigger follow-up from SF Environment, and delay approval.
  - Check other fields, like square footage, to make sure they are consistent with your records.
  - Confirm energy usage data is complete:
    - Step (A): Check for incorrect data
    - Step (B): Report & update incorrect data
    - Step (C): Confirm data & add parcel number
  - Once all alerts have been fixed and you have verified your data, generate an updated response in the Reporting tab.
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## **Step 7: Send data to SF Environment**

- From the "Reporting" tab in Portfolio Manager, click the dropdown menu for the report whose data you have just verified, and select "Send Response."
  - Enter the necessary information on the following page and click "E-Sign Response."
  - Once you see the green check mark, click "Send Data," then "Continue" in the pop-up.
  - You will receive follow-up from SF Environment once we have reviewed your submittal. SF Environment will either indicate your report is complete or identify what is needed.
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## **Links**

## San Francisco

- [Overview of the Existing Commercial Buildings Energy Performance Ordinance](#) (PDF)
- [Environment Code Chapter 20](#) (The Ordinance)
- [SF Planning Department's Property Information Map](#)