

# How to Release Your Data for Benchmarking

Instructions for Authorizing and Revoking Release of Customer Data for use in ENERGY STAR® Portfolio Manager and PG&E's Portfolio Manager Web Services



This document is a quick-start guide for Pacific Gas and Electric Company’s (PG&E) customers who would like to release their data for use in ENERGY STAR Portfolio Manager, via PG&E’s Portfolio Manager Web Services. For additional help, please refer to resources on the PG&E’s Benchmarking Web site” [www.pge.com/benchmarking](http://www.pge.com/benchmarking).

## OVERVIEW

ENERGY STAR® Portfolio Manager, an online tool created by the Environmental Protection Agency (EPA), benchmarks property energy performance by tracking energy consumption of properties and comparing them to similar buildings nationwide. PG&E’s Portfolio Manager Web Services makes it easier to use this tool by uploading meter data automatically to Portfolio Manager.

As of January 1, 2014, non-residential Property Owners are required to benchmark their building’s energy performance using Portfolio Manager and disclose results at the point of a whole building real estate transaction, including sale, lease, or refinance. As a result, PG&E Customers may be asked to release their energy data to their Property Owners or Landlords to complete the benchmarking process in Portfolio Manager.

This guide will walk PG&E Customers through the process of authorizing and revoking release of data to their Property Owner or Landlord for use in Portfolio Manager.

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# SECTION 1 | How to Authorize Release of Customer Data

**IMPORTANT NOTE:** Before a PG&E Customer may use this form, Property Owners (or Portfolio Manager account holders) must first *share their Property with PG&E through Portfolio Manager*. For more information, see the How To Benchmark Guide: [www.pge.com/HowToBenchmark](http://www.pge.com/HowToBenchmark).

1. Access [www.pge.com/benchmarking](http://www.pge.com/benchmarking) and locate the link for the online Portfolio Manager Web Services Data Authorization form.

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### Energy Performance Benchmarking

Use ENERGY STAR® Portfolio Manager to Benchmark Your Building

Are you looking for ways to save energy and reduce operating costs? Energy Performance Benchmarking enables property owners and operators to monitor energy performance over time, identify and prioritize energy efficiency opportunities, and verify energy and cost savings.

Portfolio Manager, EPA's ENERGY STAR measurement and tracking tool, allows building owners and operators to track and assess energy and water consumption of your buildings. It generates weather-normalized energy use intensity and greenhouse gas emissions metrics for all buildings, as well as a 1-100 ENERGY STAR energy performance score for many eligible building types. Custom reports also allow users to see time trending information and compare buildings within their portfolio.

#### Getting Started

**Information for Property Owners:**

- Register for a hands-on benchmarking workshop through the Pacific Energy Center.
- Create your account in Portfolio Manager using the step-by-step instructions in PG&E's How to Benchmark Your Building Guide.
- After your Property has been shared with PG&E, ask your tenants (the customer of record for each meter shared with PG&E in Portfolio Manager) to authorize release of their meter data to the Property Owner using the Portfolio Manager Web Services Data Authorization Form.
- After each meter has been authorized for release to the building owner, PG&E will upload meter data to the Property Owner's Portfolio Manager account, usually within 24 hours after the data authorization is recorded in the customer's account.

**Information for Customers:**

Property Owners are subject to several California benchmarking and disclosure policies requiring them to benchmark and disclose the energy use of their building. To comply with these policies, Property Owners need building tenants to release their energy data to the Property Manager for use in the benchmarking analysis.

To release data to your Property Owner, please complete the Portfolio Manager Web Services Data Authorization form. This can be done in one of two ways:

- **Online Form:** The online authorization form will be available in December 2013.

**Training and Support**

For assistance with benchmarking through the EPA's Portfolio Manager, please see the instructions and webinars provided on the ENERGY STAR website or refer to ENERGY STAR's online Help and FAQ.

PG&E offers several resources to assist with activating PG&E Portfolio Manager Web Services:

- Step-by-step How to Benchmark Your Building Guide
- Hands-on benchmarking workshops through the Pacific Energy Center
- Online Benchmarking Learning Center (available in December 2013)

For questions on PG&E's Web Services, refer to PG&E's How to Benchmark Your Building Guide, or contact us.

#### California Benchmarking and Disclosure Policies

Depending on the size and location of a building, building owners may be required to benchmark a building using ENERGY STAR Portfolio Manager and disclose the building's energy use. Learn more about the California benchmarking policies for non-residential buildings.

Expand All | Collapse All

- California Energy Commission Non-Residential Building Energy Use Disclosure Program (AB110)
- San Francisco Existing Commercial Building Energy Performance Ordinance

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Link to online authorization form

Link to online authorization form

2. Read important Customer information. Click 'Continue'.

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Your Bill & Account Save Money Rates Services

Manage Your Account  
Assess Your Energy Usage  
Ways to Pay Your Bill  
Open, Close or Move Your Account  
Understand Your Energy Statements

## Portfolio Manager Web Services Data Authorization Form

### Important Legally Binding Information for Customers

The purpose of this form is to allow you, the customer, to exercise your right to choose whether to disclose your personal electricity and/or natural gas usage data to the building owner or landlord of the building in which you receive electric or natural gas service, and to the United States Environmental Protection Agency, for the purpose of calculating the whole energy usage of the building owner's or landlord's building.

#### Customer Responsibilities

If you authorize the sharing of your energy usage data, your usage data also may be reported to the United States Environmental Protection Agency in order to assist the building owner or landlord in complying with a California law (Assembly Bill 1103) that requires disclosure of the whole building energy usage to prospective buyers of the building. Once you authorize the building owner or landlord to receive this information about you, you are responsible for ensuring that the building owner or landlord safeguards the personal information from further disclosure without your consent. You may revoke this authorization at any time by accessing [www.pge.com/benchmarking](http://www.pge.com/benchmarking) and revising this form.

#### Authorization of Access

This form authorizes the building owner or landlord of the customer and the United States Environmental Protection Agency (U.S. Environmental Protection Agency ENERGY STAR, 1200 Pennsylvania Ave NW, MC6202J, Washington, D.C. 20460) to access the customer's electricity and/or natural gas meter usage data only and only for the purpose of calculating the overall energy use of the building.

#### Privacy

Under Pacific Gas and Electric Company's (PG&E's) privacy policies, that can be found at [www.pge.com/about/company/privacy/customer](http://www.pge.com/about/company/privacy/customer), PG&E generally does not sell or disclose personal information about you, such as your name, address, phone number, or electric or gas account and usage or billing information, to third parties unless you expressly authorize us to do so.

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3. Enter your PG&E Account number, either the Phone Number or Meter Number associated with your PG&E Account, and complete the Security CAPTCHA. Click 'Continue'.

NOTE: If you have multiple PG&E Accounts, complete this form for each Account.

The screenshot shows the PG&E website's 'Portfolio Manager Web Services Data Authorization' page. The page has a blue header with the PG&E logo and navigation links. Below the header is a menu with 'Your Bill & Account', 'Save Money', 'Rates', and 'Services'. A sidebar on the left lists account management options. The main content area is titled 'Portfolio Manager Web Services Data Authorization' and 'Customer Validation'. It includes a sub-header 'General Account Information' with a required field for 'Account Number'. Below that is a 'Customer Verification' section with radio buttons for 'Phone Number' and 'Meter Number', and a required field for verification. The 'Security' section contains a CAPTCHA image showing the number '101759' and a required input field. At the bottom right are 'Cancel' and 'Continue' buttons. Red arrows and text annotations provide instructions for each field.

**Enter PG&E Account Number:** Your 10-digit Account Number is located at the upper right corner of your monthly PG&E Energy Statement

Select to enter the **Phone Number or Meter Number** tied to the PG&E Account

Complete security CAPTCHA

Click 'Continue'

**Enter Phone Number or Meter Number:**

For Phone Number, enter any of your Phone Number(s) associated with your Account, using the format: (###) ###-####.

For Meter Number, enter any of the Meter Number(s) associated with your Account. Your Meter Number(s) are located in the "Service Information" section of your monthly PG&E Energy Statement.

**For more information on reading your bill, see this guide on "Understanding Your Energy Statement":** <http://www.pge.com/en/mybusiness/account/bill/index.page>

- (Step 1) Choose to 'Authorize' release of your data, select the Service ID's to release, and select an Authorized Third Party to receive your data. Click 'Continue'.

**Portfolio Manager Web Services Data Authorization**  
Step 1 of 2

Step 1: Application Details | Step 2: Review & Submit

**Authorization/Revocation Indicator**

Smith, Bob

Select one:

AUTHORIZE disclosure of energy usage of service addresses identified below.

REVOKE authorization of disclosure of energy usage of all service addresses identified below.

Account ID: 0000123456

\* Select one or more service ID(s)

**\* Service ID Selection**

Select	Service ID	Service Address
<input checked="" type="checkbox"/>	0000123478	123 Main Street, San Francisco

[Select/Deselect all](#)

\* Select up to ten Third Parties

**\* Authorized Third Party Selection**

Select the Property Owner to which data should be released.  
The Property Owner should provide you with this information.

Type Address Here

+/-	Party Name
-----	------------

**\* Terms and Conditions**

I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information to the building owner or landlord designated above pursuant to this Authorization; 2) the unauthorized use of this information by the building owner or landlord; and 3) from any actions taken by the building owner or landlord pursuant to this Authorization. I understand that PG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I understand that I may cancel this authorization at any time by submitting a written request to PG&E. This agreement at all times shall be subject to such modifications as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.

I agree to the terms and conditions.

Cancel Reset **Continue**

Select radio button to 'Authorize' release of your data.

The Service ID's associated with your PG&E Account will display here. Select the individual Service ID's you would like to authorize for release or use the 'Select/Deselect All' option below to select Service ID's.

Select an Authorized Third Party by searching for your Property address. Enter the first five characters of your property address to search. If the Property Owner has shared the Property information with PG&E, the Property name and address will display as an option. Select this Property to release data to the Property Owner. If the Property is not displayed, either the Property Owner has not shared the Property with PG&E or you are not searching on the correct Property address. Please confirm the address with your Property Owner or Landlord.

Select the check box to accept the Terms and Conditions.

Click 'Continue'

5. (Step 2) Review the entered information. If there are no issues, click 'Submit'. Else, click 'Reset' to start over, or click 'Cancel' to exit the form.'

Note: The 'Step 2' page looks very similar to the 'Step 2' page.

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### Portfolio Manager Web Services Data Authorization

**Step 2 of 2**

Please review and submit this form to authorize or revoke authorization to disclose your electricity and gas usage information to the designated Third Party.

The identified Third Party(s) are appointed with the authority to obtain from PG&E the electricity and gas usage for my PG&E account listed below for the purpose of calculating the overall energy usage of the building in which I am receiving electricity and gas service, and to share the usage with the U.S. Environmental Protection Agency to assist in the calculation.

Step 1: Application Details **Step 2: Review & Submit**

#### Authorization/Revocation Indicator

Smith, Bob

Select one:

AUTHORIZE disclosure of energy usage of service addresses identified below.  
 REVOKE authorization of disclosure of energy usage of all service addresses identified below.

Account ID: 0000123456

\* Select one or more service ID(s)

#### \* Service ID Selection

Select	Service ID	Service Address
<input checked="" type="checkbox"/>	0000123478	123 Main Street, San Francisco

[Select/Deselect all](#)

\* Select up to ten Third Parties

#### \* Authorized Third Party Selection

Select the Property Owner to which data should be released.   
The Property Owner should provide you with this information.

+/-	Party Name
<input checked="" type="checkbox"/>	123 Main Street, San Francisco (SF Tech Park – 123 – 125 Main Street)

#### \* Terms and Conditions

I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information to the building owner or landlord designated above pursuant to this Authorization; 2) the unauthorized use of this information by the building owner or landlord; and 3) from any actions taken by the building owner or landlord pursuant to this Authorization. I understand that PG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I understand that I may cancel this authorization at any time by submitting a written request to PG&E. This agreement at all times shall be subject to such modifications as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.

I agree to the terms and conditions

→ Click 'Submit'

6. View the confirmation page. No further action is required. Your data will be automatically transmitted to Portfolio Manager.

The screenshot shows the PG&E website header with the logo and navigation links: "For My Home", "About PG&E", "Media Newsroom", "Careers", "Contact Us", and "Español". There is a search bar with a "Go" button and a "Login" link. Below the header is a navigation menu with "Your Bill & Account", "Save Money", "Rates", and "Services". On the left side, there is a vertical menu with links: "Manage Your Account", "Assess Your Energy Usage", "Ways to Pay Your Bill", "Open, Close or Move Your Account", and "Understand Your Energy Statements". The main content area features the heading "Portfolio Manager Web Services Data Authorization" and a confirmation message: "Confirmation - Your request has been submitted successfully." Below this, a paragraph states: "Your selected data will be released to the Authorized Third Party account in ENERGY STAR Portfolio Manager. This authorization overrides all previous Portfolio Manager Web Services Data authorizations and revocations. To revoke the Authorized Third Party's access to your data, please [re-submit this form](#)." At the bottom, there is a footer with links: "For My Home", "For My Business", "Business to Business", "About PG&E", and "Privacy". A small disclaimer reads: "\*PG&E\* refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation. © 2013 Pacific Gas and Electric Company. All rights reserved."



# SECTION 2 | How to Revoke Release of Customer Data

1. Access [www.pge.com/benchmarking](http://www.pge.com/benchmarking) and locate the link for the online Portfolio Manager Web Services Data Authorization form.

Link to online authorization form

Link to online authorization form

2. Read important Customer information. Click 'Continue'.

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#### Customer Responsibilities

If you authorize the sharing of your energy usage data, your usage data also may be reported to the United States Environmental Protection Agency in order to assist the building owner or landlord in complying with a California law (Assembly Bill 1103) that requires disclosure of the whole building energy usage to prospective buyers of the building. Once you authorize the building owner or landlord to receive this information about you, you are responsible for ensuring that the building owner or landlord safeguards the personal information from further disclosure without your consent. You may revoke this authorization at any time by accessing [www.pge.com/benchmarking](http://www.pge.com/benchmarking) and revising this form.

#### Authorization of Access

This form authorizes the building owner or landlord of the customer and the United States Environmental Protection Agency (U.S. Environmental Protection Agency ENERGY STAR, 1200 Pennsylvania Ave NW, MC6202J, Washington, D.C. 20460) to access the customer's electricity and/or natural gas meter usage data only and only for the purpose of calculating the overall energy use of the building.

#### Privacy

Under Pacific Gas and Electric Company's (PG&E's) privacy policies, that can be found at [www.pge.com/about/company/privacy/customer](http://www.pge.com/about/company/privacy/customer), PG&E generally does not sell or disclose personal information about you, such as your name, address, phone number, or electric or gas account and usage or billing information, to third parties unless you expressly authorize us to do so.

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3. Enter your PG&E Account number, either the Phone Number or Meter Number associated with your PG&E Account, and complete the Security CAPTCHA. Click 'Continue'.

The screenshot shows the PG&E website's 'Customer Validation' page. At the top, there is a navigation bar with the PG&E logo and links for 'For My Home', 'About PG&E', 'Media Newsroom', 'Careers', 'Contact Us', and 'Español'. Below this is a search bar with 'Go' and 'Login' buttons. A secondary navigation bar includes 'Your Bill & Account', 'Save Money', 'Rates', and 'Services'. On the left, a sidebar menu lists options like 'Manage Your Account', 'Assess Your Energy Usage', 'Ways to Pay Your Bill', 'Open, Close or Move Your Account', and 'Understand Your Energy Statements'. The main content area is titled 'Portfolio Manager Web Services Data Authorization' and 'Customer Validation'. It includes a sub-header 'General Account Information' with a field for 'Account Number' and a red arrow pointing to it with the text 'Enter PG&E Account Number: Your 10-digit Account Number is located of the upper right corner of your monthly PG&E Energy Statement'. Below that is the 'Customer Verification' section with radio buttons for 'Phone Number' and 'Meter Number', and a red arrow pointing to the 'Phone Number' option with the text 'Select to enter the Phone Number or Meter Number tied to the PG&E Account'. The 'Security' section features a CAPTCHA image showing the number '101759' and a red arrow pointing to the input field with the text 'Complete security CAPTCHA'. At the bottom right, there are 'Cancel' and 'Continue' buttons, with a red arrow pointing to the 'Continue' button and the text 'Click 'Continue''.

**Enter Phone Number or Meter Number:**

For Phone Number, enter any of your Phone Number(s) associated with your Account, using the format: (###) ###-####.

For Meter Number, enter any of the Meter Number(s) associated with your Account. Your Meter Number(s) are located in the "Service Information" section of your monthly PG&E Energy Statement.

**Enter PG&E Account Number:** Your 10-digit Account Number is located of the upper right corner of your monthly PG&E Energy Statement

Select to enter the **Phone Number or Meter Number** tied to the PG&E Account

Complete security CAPTCHA

Click 'Continue'

**For more information on reading your bill, see this guide on "Understanding Your Energy Statement":** <http://www.pge.com/en/mybusiness/account/bill/index.page>

4. (Step 1) Choose to 'Authorize' release of your data, select the Service ID's to release, and select an Authorized Third Party to receive your data. Click 'Continue'.

The Service ID's associated with your PG&E Account will display here. Select the individual Service ID's you would like to revoke for release or use the 'Select/Deselect All' option below to select Service ID's.

Select radio button to 'Revoke' release of your data.

Select the check box to accept the Terms and Conditions.

Click 'Continue'

5. (Step 2) Review the entered information. If there are no issues, click 'Submit'. Else, click 'Reset' to start over, or click 'Cancel' to exit the form.'

Note: The 'Step 2' page looks very similar to the 'Step 2' page.

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### Portfolio Manager Web Services Data Authorization

Step 2 of 2

Please review and submit this form to authorize or revoke authorization to disclose your electricity and gas usage information to the designated Third Party.

The identified Third Party(s) are appointed with the authority to obtain from PG&E the electricity and gas usage for my PG&E account listed below for the purpose of calculating the overall energy usage of the building in which I am receiving electricity and gas service, and to share the usage with the U.S. Environmental Protection Agency to assist in the calculation.

Step 1: Application Details | **Step 2: Review & Submit**

#### Authorization/Revocation Indicator

Select one:

AUTHORIZE disclosure of energy usage of service addresses identified below.  
 REVOKE authorization of disclosure of energy usage of all service addresses identified below.

Account ID:

\* Select one or more service ID(s)

#### \* Service ID Selection

Select	Service ID	Service Address
<input checked="" type="checkbox"/>	0000123478	123 Main Street, San Francisco

[Select/Deselect all](#)

#### \* Terms and Conditions

I hereby release, hold harmless, and indemnify PG&E from any liability, claims, demands, causes of action, damages, or expenses resulting from: 1) any release of information to the building owner or landlord designated above pursuant to this Authorization; 2) the unauthorized use of this information by the building owner or landlord; and 3) from any actions taken by the building owner or landlord pursuant to this Authorization. I understand that PG&E reserves the right to verify any authorization request submitted before releasing information or taking any action on my behalf. I understand that I may cancel this authorization at any time by submitting a written request to PG&E. This agreement at all times shall be subject to such modifications as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.

I agree to the terms and conditions

Click 'Submit'

6. View the confirmation page. No further action is required. Your data will be automatically transmitted to Portfolio Manager.

The screenshot shows the PG&E website interface. At the top, there is a navigation bar with the PG&E logo on the left and links for "For My Home", "About PG&E", "Media Newsroom", "Careers", "Contact Us", and "Español". To the right of these links are "Go" and "Login" buttons. Below the navigation bar is a secondary menu with "Your Bill & Account", "Save Money", "Rates", and "Services". On the left side, there is a vertical menu with links: "Manage Your Account", "Assess Your Energy Usage", "Ways to Pay Your Bill", "Open, Close or Move Your Account", and "Understand Your Energy Statements". The main content area is titled "Portfolio Manager Web Services Data Authorization" and contains a confirmation message: "Confirmation - Your request has been submitted successfully." Below this, it states: "Your selected data will no longer be released to the Authorized Third Party account in ENERGY STAR Portfolio Manager. This revocation overrides all previous Portfolio Manager Web Services Data authorizations and revocations. To authorize release of your, please [re-submit this form](#)." At the bottom of the page, there is a footer with links for "For My Home", "For My Business", "Business to Business", "About PG&E", and "Privacy", followed by a copyright notice: "PG&E® refers to Pacific Gas and Electric Company, a subsidiary of PG&E Corporation. © 2013 Pacific Gas and Electric Company. All rights reserved."

## SECTION 3 | For More Information

For more information or assistance with completing the online authorization form:

Review [www.pge.com/benchmarking](http://www.pge.com/benchmarking)

Email: [benchmarking@pge.com](mailto:benchmarking@pge.com)

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