

How to Benchmark Your Building using PG&E's Building Benchmarking Portal

Instructions for using the PG&E Building
Benchmarking Portal and ENERGY
STAR® Portfolio Manager



PG&E Whole Building Benchmarking Program

Public

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This document is a guide for how to setup the Pacific Gas & Electric Company's (PG&E) Building Benchmarking Portal and connect your building with ENERGY STAR® Portfolio Manager platform to receive energy usage data.

Introduction

Benchmarking

Benchmarking is the process of tracking your building's energy usage to enable you to:

- Determine your comparative energy use in relation to other similar buildings
- View your monthly energy consumption
- Help you comply with local and / or statewide regulations requiring buildings to disclose their energy usage

ENERGY STAR® Portfolio Manager is an easy-to-use online tool to benchmark your buildings.

California Energy Commission's Building Energy Benchmarking Program

The State of California passed Assembly Bill (AB) 802 to help building owners access their building energy usage data to better understand the energy consumption of their building. AB 802 also created a statewide energy usage disclosure program for buildings larger than 50,000 square feet known as the Building Energy Benchmarking Program.

The Building Energy Benchmarking Program requires owners of large commercial and multifamily buildings to report energy use to the California Energy Commission by June 1 annually.

Additional information regarding the California Energy Commissions' (CEC) Building Energy Benchmarking Program including compliance reporting requirements, reporting timelines, and program resources can be located at [California Energy Commission Building Energy Benchmarking Program](#) pages.

For additional assistance with the CEC's Building Energy Benchmarking Program, please contact Benchmarking@energy.ca.gov

Local Municipal Benchmarking Programs

Some regional municipalities have incremental Building Benchmarking Program requirements for buildings that meet certain criteria (Square footage, Primary Use, etc.,) within their territory. Some examples are listed below with helpful program links including reporting requirements and timelines.

Municipality	Benchmarking Program Information
Berkeley	Building Energy Saving Ordinance (BESO)
Brisbane	Brisbane Building Energy Program
San Francisco	San Francisco Existing Building Benchmarking
San Jose	San Jose Building Performance Ordinance

If you have questions on whether your building requires benchmarking reporting, please contact your local municipality for information regarding specific reporting requirements and reporting timeline as needed.

ENERGY STAR Portfolio Manager

ENERGY STAR Portfolio Manager (ESPM) is a free online tool allowing building owners to measure and track energy usage, as well as greenhouse gas emissions, for their buildings. Specific benchmarking account instructions are provided in this document (Section 3)

To access the ESPM tool please visit the [ENERGY STAR® Portfolio Manager Website](#)

For customer support regarding the ESPM tool functionality, please contact [ESPM Support](#)

PG&E's Whole Building Benchmarking Program

Benchmarking enables you to determine how to lower your building's environmental footprint as well as your monthly energy costs. For many building owners, it is voluntary. However, some building owners must report their energy usage data to the California Energy Commission and local municipalities as mentioned.

PG&E's Building Benchmarking Portal is a free tool for all building owners in our service territories. Once configured and linked to a paired property in the ESPM tool, PG&E will provide aggregated NET energy usage data for all meters linked to the premise directly to the ESPM tool. PG&E will provide historical usage data for up to two full prior years and will share updated usage data monthly while linked for data sharing.

As defined by AB 802, the legislation allows building owners, or their authorized agents, to obtain the energy usage data (across all tenants) for their building. In some cases, data may be obtained without authorization. However, in the following cases, authorizations will be needed before the data can be released:

If building has three or fewer active Service Agreements (by Commodity), none of which are residential

If building has five or fewer active Service Agreements (by Commodity), where at least one account is residential

More information about PG&E's Whole Building Benchmarking Program is available at [PG&E's Whole Building Benchmarking Program](#)

For assistance with the Whole Building Benchmarking program, please contact Benchmarking@pge.com

Benchmarking Using the Whole Building Benchmarking Portal (BMP)

Building owners, or agents working on behalf of the building owner, can use the BMP to benchmark their building: first by selecting the utility meters affiliated with your building, and then connecting the building with the paired property ESPM.

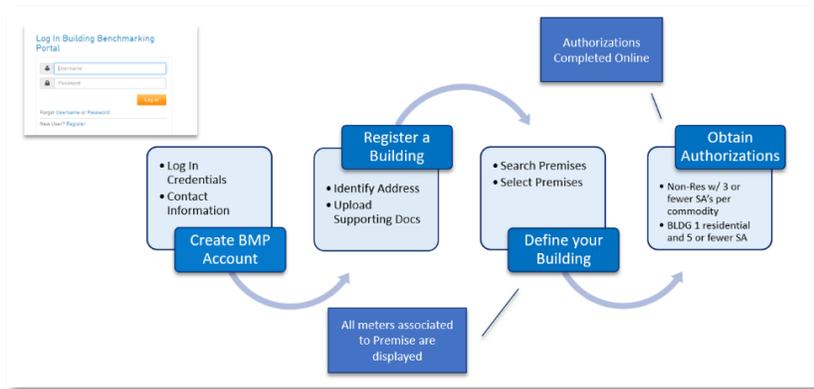
The Building Benchmarking Portal (BMP) enables building owners to receive aggregate whole-building energy usage data in their ENERGY STAR Portfolio Manager account.

If you have previously benchmarked your building in ESPM with PG&E's legacy Individual Meter Sharing web service s connection (pacificgaselectric), this guide will provide instructions on how to adjust your ESPM Property to begin receiving data from the Whole Building Program connection (pge_agg_benchmark).

Process Overview for the Whole Building Benchmarking Program

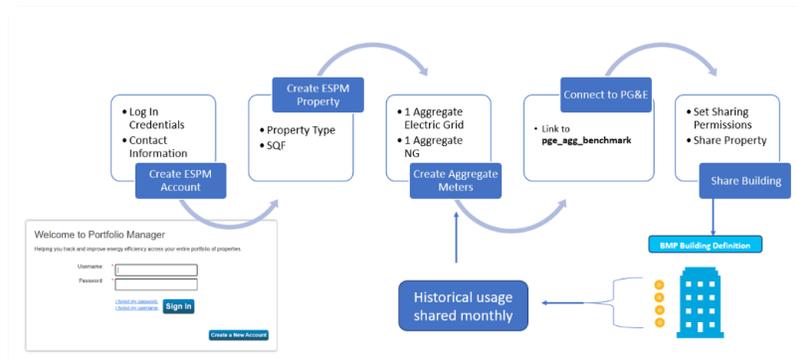
The initial set up of your building with the BMP and linking to ESPM must be completed in the following order:

PG&E Benchmarking Portal



- Building owner, or authorized agent, creates a Benchmarking Portal account and submits a building registration request for approval
- Once the registration is approved, the BMP account holder creates a building definition by searching for and selecting the utility meters at their building
- If required, the building owner obtains authorization from utility meter account holders to authorize the release of their energy usage data to ESPM. An Authorization Required message displays in the Portal Account if needed

ESPM Portal



- After BMP setup is complete and any data authorizations obtained, BMP account holder creates an ENERGY STAR Portfolio Manager account for their building to connect to PG&E for ongoing data-sharing
- Once all steps above are completed, available historical aggregate NET energy usage date is uploaded into the building owner's ENERGY STAR Portfolio Manager Property and will continue monthly

NOTE: Setup must be followed in this order. Additionally, some steps require PG&E and ESPM systems to synchronize with one another. These processes may take up to 24 hours to process and are noted in the document.

Tips before getting started

- 1) Gather as much meter information as possible: take a physical inventory of the number of meters at the building and review utility bills for PG&E Meter IDs and Service Addresses of the meters at your building.
- 2) If this is your first time using the BMP, and have multiple buildings to link, we recommend completing one building setup end-to-end to ensure successfully processing, before completing set up of remaining buildings.
- 3) If you are a new ESPM User, review ENERGY STAR's website for helpful guidance on how to create your ESPM Account.

If you plan to create multiple buildings, unless otherwise noted, you will need to follow the same steps for each building.

Converting ESPM Individual Meter Sharing Accounts (AB1103) to Whole Building Benchmarking (AB802)

If you have an existing ESPM property connected to PG&E's legacy program for Individual Meter Sharing (pacificgaselectric), you will need to follow the steps listed in Section 1 and Section 2 of this User Guide to set up your Benchmarking Portal account, and then skip to Section 6 for instructions on how to convert your existing ESPM account for Whole Building data sharing.

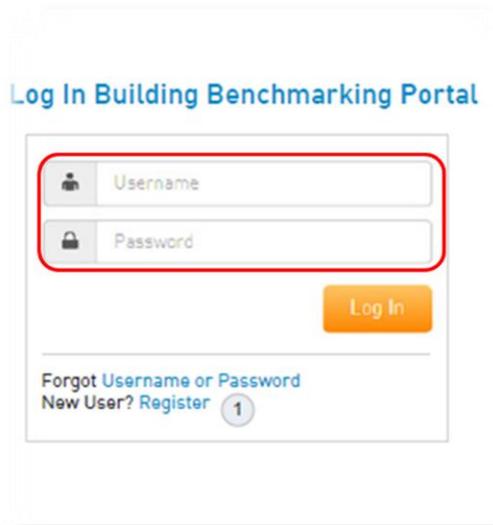
Section 1 | Setup a Building in the Building Benchmarking Portal

This section provides instructions on how to setup a building in the Building Benchmarking Portal (BMP)

1.1 Create an Account in the BMP

1. Access the BMP Log in Screen from the Benchmarking Page here: [PG&E Building Benchmarking](#). Do not bookmark the log in page as subsequent attempts to access will result in errors.
2. Click [Register](#) and create an online account for the BMP. **NOTE:** Do not use special characters (e.g., “#,” “\$”) for any fields

NOTE: If you have an existing PG&E Account at www.pge.com, you cannot reuse these login credentials. You must create a new Username and password specifically for the Benchmarking Portal. If you attempt to reuse your credentials, you will receive an UNAUTHORIZED USER error message on subsequent log in to the BMP.



Log In Building Benchmarking Portal

Username

Password

Log In

Forgot Username or Password

New User? Register 1

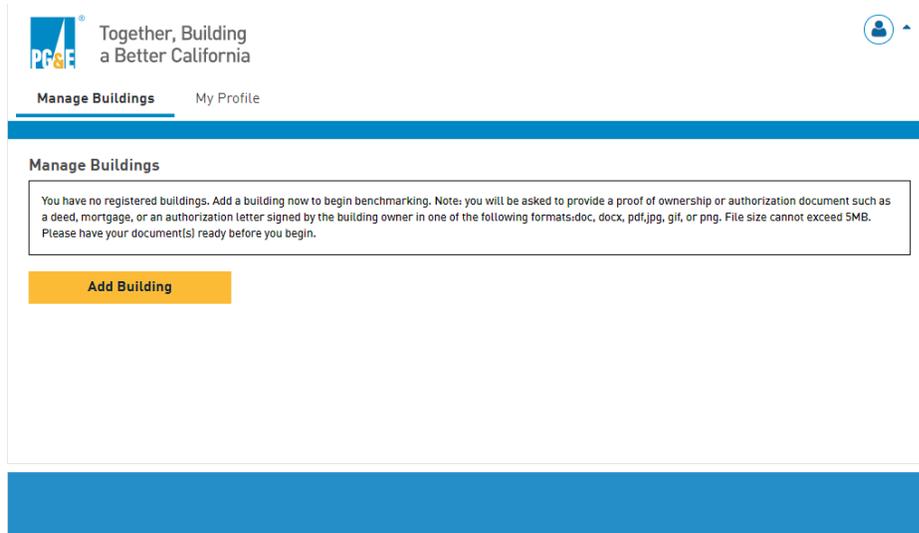
You will receive a confirmation email notification that you have successfully created a BMP account. The email address entered in your profile is how PG&E’s Benchmarking Team will contact you, or if a password reset is needed.

If you are benchmarking on behalf of an organization or company, it is strongly recommended that BMP account holders use an email address accessible to all authorized parties that require access. Ownership of BMP portal accounts are non-transferrable and if the organization no longer has access to the original email, a new portal account will need to be created. And the entire process must be restarted.

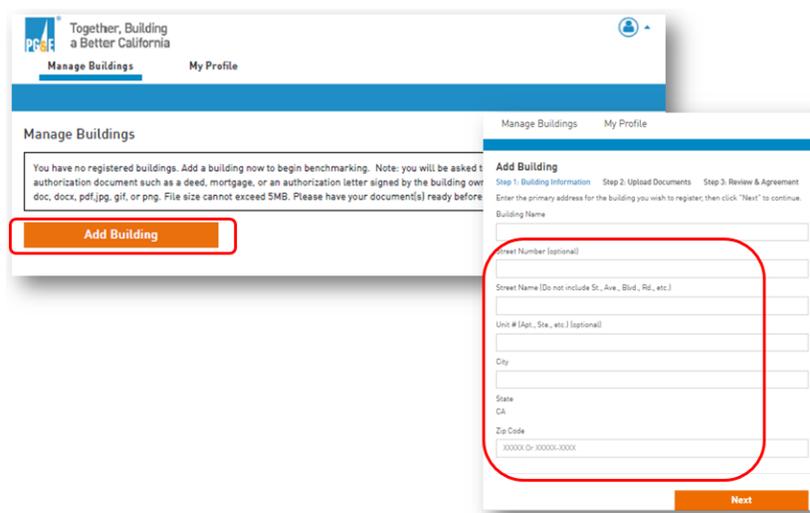
1.2 Register and Create New Building

NOTE: If you have multiple buildings to benchmark, you need to register each building individually in the following format. Once you create your BMP account you will be able to add your first Building.

1. Select the Manage Buildings Tab in your portal account



2. Click the Add Building button
3. After clicking on Add Building, enter the required information, and click the NEXT button



1.3 Attach the Letter of Attestation

Registrations require documentation indicating you either own the building or have been authorized to benchmark the building by the building owner. This can include:

1. Owner's Agents or 3rd Party Service Providers can submit attestations (e.g., Letter of Authorization) indicating that they either own the building, or that the building owner has authorized their access to "benchmark the building"
2. Owners can also submit documents such as a deed or mortgage statement, Tax Bills, PG&E Blue Bills

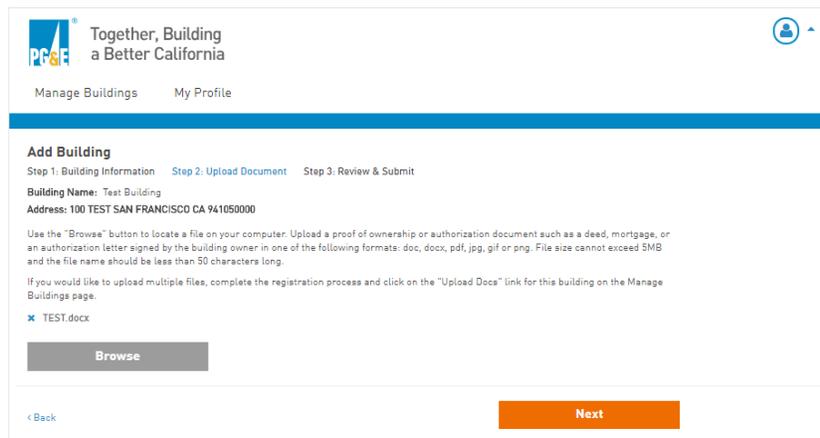
Building Attestations *MUST* include the authorization statement and include:

- Date Signed
- Premise name (as applicable) and addresses covered by the attestation
- Signature of person authorized to allow benchmarking on their behalf
- Name of the third-party who will be benchmarking as applicable

This Letter of attestation supports the benchmarking process for the building. If tenant authorizations are required, a *separate* Data Authorization form must be completed.

Note: The BMP application supports the upload of jpg, doc(x), xls(x), and pdf formats. File names are limited to fifty characters or less and file size cannot exceed 5mb, or file upload will fail, and an error message will display.

1. Once the attestation document is ready, click the Browse button to locate the file on your computer and upload, click the NEXT button.



The screenshot shows a web interface for PG&E with the slogan "Together, Building a Better California". It features a navigation bar with "Manage Buildings" and "My Profile". The main content area is titled "Add Building" and shows a progress indicator with three steps: "Step 1: Building Information", "Step 2: Upload Document" (which is active), and "Step 3: Review & Submit". The form displays "Building Name: Test Building" and "Address: 100 TEST SAN FRANCISCO CA 941050000". Below this, there is a detailed instruction: "Use the 'Browse' button to locate a file on your computer. Upload a proof of ownership or authorization document such as a deed, mortgage, or an authorization letter signed by the building owner in one of the following formats: doc, docx, pdf, jpg, gif or png. File size cannot exceed 5MB and the file name should be less than 50 characters long." Another instruction states: "If you would like to upload multiple files, complete the registration process and click on the 'Upload Docs' link for this building on the Manage Buildings page." A file named "TEST.docx" is listed with a small 'x' icon. At the bottom of the form, there is a "Browse" button, a "< Back" link, and a "Next" button.

2. Review your request, select the box to agree to the Portal Terms and Conditions, then click the SUBMIT button

After you have submitted your request, return to the Manage Buildings tab and you will see your building added. Status is "Pending." PG&E needs to review and approve registration requests. This process typically takes up to 48 hours (about 2 days) to complete. Users will be notified via email once the building has been Approved.

Manage Buildings My Profile

Manage Buildings

✓ You have successfully added a building. Building(s) will need to be approved before you can add premises & link to your Energy Star Portfolio Manager account.

- Use the delete icon to remove a building.
- Use the "Add Building" button to add another building for approval.
- If you need to upload more documents for a pending registration, use the "Upload Docs" [documents] link.

Add Building

Buildings

	Building Name	Address	Building ID	Statuses		
				Registration	Mapping	ESPM Link
✕	PG&E Demo	245 Market San Francisco CA 94105		Pending Upload Docs		

Displaying Page 1 of 1 << First < Previous | Next > Last >>

Once approved, Registration status changes to "Approved," and Mapping status to "Undefined" indicating that you are ready for the next step in the benchmarking process.

Manage Buildings My Profile

Manage Buildings

You have approved buildings that are not yet mapped. To map a building, click the "Undefined" link in the mapping status column. You will be taken to a page where you can creating a new mapping or choose from an existing one, when available.

- Click a building name and go to a building detail page to view and edit building information, update mapping, and edit and view requested data type for that building.
- Use the delete icon to remove a building. If linked, this will unlink the building from your Energy Star Portfolio Manager (ESPM) account.
- Use the "Add Building" button to register another building for approval.
- If you need to upload more documents for a pending registration, use the "Upload Docs" [documents] link.
- Before you delete a building, please update the mapping by releasing all Premises mapped to your building.

Add Building

Buildings

	Building Name	Address	Building ID	Statuses		
				Registration	Mapping	ESPM Link
✕	PG&E Demo	245 Market San Francisco CA 94105		Approved	Undefined	

Displaying Page 1 of 1 << First < Previous | Next > Last >>

Key: On Hold = Contact Support; Undefined = Building not mapped; ESPM = Energy Star Portfolio Manager; Partial = 1 virtual meter not linked

Next, you will start the process of selecting utility meters at your building. In the BMP, this process is called "mapping." To find meters, you will search for addresses of the meters at your building. In the BMP, the meter and its associated address are referred to as a "Premise."

Before you start mapping, its recommended to:

1. Confirm the total number of physical meters at your building to ensure you have added all the meters to your building definition.
2. Retrieve and review utility bills for the Service Address. These statements will list the address of the meter in the BMP and the service address is used to search for all services.
3. Take note of the PG&E Meter ID #: either on your bill or on the physical meter. You can use this to compare with the Meter ID's listed in the portal and will also be needed if data authorizations need to be completed.
4. Finally, be sure to confirm if there are multiple addresses associated with your building. Often, meters attached to the same building can have different Service Addresses (e.g., shopping malls, building on an entire street block)

1.4 Define (Search Premises) and Map a Building

1. On the Manage Buildings tab, find your building and click on the link labeled “Undefined.”

Together, Building a Better California

Manage Buildings My Profile

Manage Buildings

You have approved buildings that are not yet mapped. To map a building, click the "Undefined" link in the mapping status column. You will be taken to a page where you can create a new mapping or choose from an existing one, when available.

- Click a building name and go to a building detail page to view and edit building information, update mapping, and edit and view requested data type for that building.
- Use the delete icon to remove a building. If linked, this will unlink the building from your Energy Star Portfolio Manager (ESPM) account.
- Use the "Add Building" button to register another building for approval.
- If you need to upload more documents for a pending registration, use the "Upload Docs" (documents) link.
- Before you delete a building, please update the mapping by releasing all Premises mapped to your building.

Add Building

	Building Name	Address	Registration	Statuses	
				Mapping	ESPM Link
✕	Test Building	100 Test San Francisco CA 941050000	Approved	Undefined	

Displaying Page 1 of 1

Key: On Hold = Contact Support; Undefined = Building not mapped; ESPM = Energy Star Portfolio Manager; Partial = 1 virtual meter not linked

2. On the next page, click on the link labeled “Go to New Building Definition”

Together, Building a Better California

Manage Buildings My Profile

Building Definition Dashboard

Building Address: 100 TEST SAN FRANCISCO CA 94105

Create New Building Definition

To create a new building definition, you can view, search and add unmapped premises associated with this address by using the link below.

[Go to New Building Definition >](#)

[Return to Manage Buildings >](#)

NOTE: The next page will display default results from the address used for building registration. If any Premises are listed, review and select the Premises you want to add to your building, then click the ADD TO NEW MAPPING button.

To Search for Premises:

- Begin by searching the primary building address or if you have access to the utility bill(s) search the Service Address on the bill. The BMP utilizes the Service Address listed in PG&E Billing systems to return results.
- Do not include** suffixes like “Street,” “St,” “Road,” “RD,” etc.
- Do not include** the zip code

Sample Search – “215 market San Francisco”

Together, Building a Better California

Manage Buildings My Profile

Search Premises

Enter the address for additional premises you want to search to, then click "Next" to continue. Note: Some buildings have side street address(es) that need to be searched for separately.

Street Number (Optional)
215

Street Name (Do not include St., Ave., Blvd., Rd., etc.)
market

City
san francisco

State
CA

Zip Code (Optional)
XXXXXX-XXXX-XXXX

[Back](#) [Search](#)

3. Click on the SEARCH button and matching results will appear on the next screen

Together, Building a Better California

Manage Buildings My Profile

Search Results: Add to New Mapping

Searched: 215 MARKET SAN FRANCISCO CA

Below are premises found at the searched address.

- Select the premises you want to include in your new building definition and click "Add to New Mapping"
- After showing more premises, be sure to scroll down and select any additional premises wanted. To select all premises, you may need to deselect/reselect "all" again.
- You can add up to 50 premises at a time to your building mapping
- Click "View Meter IDs" to see a list of meter IDs for selected premises

[Return to Search](#)

View Meter IDs: Gas: 0 Electric: 0

<input type="checkbox"/>	Premise Address	Premise Status	Gas Services	Electric Services
<input type="checkbox"/>	215 MARKET ST SAN FRANCISCO CA 941051703992	Unmapped	0	1
<input type="checkbox"/>	215 MARKET ST SAN FRANCISCO CA 941051703992	Unmapped	1	0
<input type="checkbox"/>	215 MARKET ST SAN FRANCISCO CA 941051703992	Unmapped	0	1

[Add to New Mapping](#) [Go to Building Definition Dashboard](#)

The columns in the search results provide the following information:

Check Box	Premise Address	Premise Status	Gas Services	Electric Services
Click next to each address to add individual addresses to mapping or click the box next to PREMISE ADDRESS to select all address results returned.	Service Address of utility meter	Notes if the Premise is "Unmapped" (available) or "Mapped" (unavailable to add to your building definition)	1 = active gas meter 0 = no active gas meter	1 = active electric meter 0 = no active electric meter

4. Select the Premise(s) you want to add to your building and click on the ADD TO NEW MAPPING button. This will add the Premises to your building definition.

PG&E Together, Building a Better California

Manage Buildings My Profile

Search Results: Add to New Mapping

Searched: 215 MARKET SAN FRANCISCO CA

Below are premises found at the searched address.

- Select the premises you want to include in your new building definition and click "Add to New Mapping"
- After showing more premises, be sure to scroll down and select any additional premises wanted. To select all premises, you may need to deselect/reselect "all" again.
- You can add up to 50 premises at a time to your building mapping
- Click "View Meter IDs" to see a list of meter IDs for selected premises

[Return to Search](#)

Premises		View Meter IDs: Gas: 1 Electric: 2		
Premise Address	Premise Status	Gas Services	Electric Services	
<input checked="" type="checkbox"/> 215 MARKET ST SAN FRANCISCO CA 941051703992	Unmapped	0	1	
<input checked="" type="checkbox"/> 215 MARKET ST SAN FRANCISCO CA 941051703992	Unmapped	1	0	
<input checked="" type="checkbox"/> 215 MARKET ST SAN FRANCISCO CA 941051703992	Unmapped	0	1	

[Add to New Mapping](#) [Go to Building Definition Dashboard](#)

NOTE: If your search has more than fifty matches, a **Show More** icon will appear. Click this icon to display up to fifty additional premises. Once the link disappears, all Premises have been displayed

Below are premises found at the searched address.

- Premises that are already mapped to other buildings cannot be selected for mapping. To request access to those premises, you will need to contact PG&E.
- Select the premises you want to include in your building and click "Add to Mapping"
- After showing more premises, be sure to scroll down and select any additional premises wanted. To select all premises, you may need to deselect/reselect "all" again.
- You can add up to 50 premises at a time to your building mapping
- Click "View Meter IDs" to see a list of meter IDs for selected premises

[Return to Search](#)

Premises	Show More	View Meter IDs: Gas: 0 Electric: 0	
----------	-----------	------------------------------------	--

If you are having trouble finding meters:

- Search for variations of the address, "1st", "First", "North", "N", etc.
- Review a utility bill for the meter(s) in question, and search the Service Address as listed on the bill
- Try also including the street numbers in the search

To search for additional meters at other addresses, click **Search Premises** and repeat. Once you have added all necessary Premises click the Save New Mapping button.

When you return to your Building Detail, you will find the added Premises. Notice the respective "Gas" and "Electric" totals in the top right corner. This shows you the count of **active** meters for each commodity that will report data. If the count is "0", then there are no active meters for that commodity.

Building Name: PG&E Demo
Address: 245 MARKET SAN FRANCISCO CA 94105

Energy Star Portfolio Manager
User ID: 1021197
Building ID: 1678155040
ESPM Property ID: NA

Meter Status
Gas: Not Linked
Electric: Not Linked

To add or remove premise(s) mapped to this building, use the "Update Mapping" button.

[Update Mapping](#)

Click "View Meter IDs" to see a list of meter IDs for active premises.

Premises		View Meter IDs: Gas: 1 Electric: 2			
Premise Address	Gas Services		Electric Services		
	No.	Auth Status	No.	Auth Status	
215 MARKET ST SAN FRANCISCO CA	0	N/A	1	Auth Required	
215 MARKET ST SAN FRANCISCO CA	1	Auth Required	0	N/A	
215 MARKET ST SAN FRANCISCO CA	0	N/A	1	Auth Required	

If a Premises has a “0” for both Gas and Electric, but is part of your building, you should map it to your Building. If either meter becomes active it will automatically become included in your data uploads.

It is at this point that a unique **Benchmarking Building ID** has been created. You will need this, along with your **User ID**, for future steps during the Data Authorization (as needed) and to link to your ESPM Property once created. Please make note of it.

NOTE: If a Premise is labeled “Mapped,” it is connected to another building and is unavailable. The Benchmarking Portal does not support the mapping of Premises to more than one building. If you have questions about a mapped building/premises? contact the Benchmarking Team at benchmarking@pge.com

Once you complete mapping the building, the Mapping Status will now update to “Defined”

Buildings		Statuses		
Building Name	Address	Registration	Mapping	ESPM Link
Test Building	100 Test San Francisco CA 941050000	Approved	Defined	Not Linked

Once you have mapped all your meters, you have completed your building setup in the BMP.

NOTE: Section 2 and Section 3 covers the “Auth Required” (if applicable) and “Not Linked” text you see in your Building Detail. These will be addressed in the later steps.

1.5 How to Remove a Meter

If you need to remove a meter from an existing building definition, access the Manage Buildings Tab, select the building, and from the Building Details screen, click the UPDATE MAPPING button.

De-select the premise addresses associated with the meters you want to remove by unselecting the checkbox next to the premise address that you want to remove, then select the SAVE UPDATES button.

Together, Building a Better California

Manage Buildings My Profile

Update Building Definition

Building Address: 100 TEST SAN FRANCISCO CA 941050000

Below are all the existing mapped premises found at this address. To update this mapping, you can:

- Remove any premises from this mapping by deselecting any checked premises.
- Or use the "Search Premises" button to locate and add more premises to the list.
- After showing more premises, be sure to scroll down and select any additional premises wanted. To select all premises, you may need to deselect/reselect "all" again.
- You can add or remove up to 50 premises each to update your building mapping.
- Click "View Meter IDs" to see a list of meter IDs for selected (active) premises.
- To cancel out this update, click "Return to Building Detail".

Search Premises

View Meter IDs: Gas: 1 Electric: 1

<input type="checkbox"/>	Premise Address	Gas Service	Electric Service
<input checked="" type="checkbox"/>	215 MARKET ST SAN FRANCISCO CA 941051703992	0	1
<input type="checkbox"/>	215 MARKET ST SAN FRANCISCO CA 941051703992	1	0
<input type="checkbox"/>	215 MARKET ST SAN FRANCISCO CA 941051703992	0	1

Save Updates

[Return to Building Details](#)

NOTE: If you need to delete a building, PLEASE REMOVE ALL METERS before deleting the building. If this process is not followed, you will not be able to add them back to a building definition without assistance from the Benchmarking Team.

After completing building definition setup in the BMP, if applicable, the next step is to have any required meter authorizations completed by the meter's account holder.

Once any authorizations are completed, you will set up your ENERGY STAR Portfolio Manager (ESPM) account and connect the ESPM Property with PG&E. If your Building Detail does not include requirements for meter authorizations, you can move to Section 3.

Please note PG&E cannot advise you on how to define/map your building. This will be based on a user's individual benchmarking needs.

Section 2 | Meter Authorizations (If Applicable)

If applicable, the next step is to have the account holder of the active meter(s) authorize the release of their usage data to your building. If your building does not indicate Authorizations are required, please continue to Section 3 for guidance on configuring an ESPM account for ongoing data-sharing.

Based on the number of active meters in your building definition, Data Authorizations may be required. If required, you will see an “Auth Required” note next to the meter on your Building Detail page.

Gas Services		Electric Services	
No.	Auth Status	No.	Auth Status
1	Auth Required	1	Auth Required

Meters need to be authorized if:

- A non-residential building has three or fewer active Service Agreements per commodity (gas/electric)
- A building with at least one residential utility account has five or fewer active Service Agreements per commodity

Below are steps the account holder of the meter(s) should follow to authorize their release.

To complete an authorization, you will need the Building ID of your building – this is found in the Building Detail page:

NOTE – Once an authorization is submitted, it will take approximately 24 hours to process. The Auth Status will change and be updated in your building after the processing is completed.

2.1 How to Complete the Web Services Data Authorization Form

Account holders of the meter can authorize the release of their data via the online form: [Portfolio Manager Web Services Data Authorization Form](#).

1. Access the Portfolio Manager Web Services Data Authorization form.
2. Enter the ten-digit Account Number and select and populate either the Meter Number, (available on the Billing Statement) or the Phone Number linked to the PG&E Account.
3. Populate the Captcha and click the CONTINUE button.

Portfolio Manager Web Services Data Authorization

1. Customer validation
2. Application details
3. Review, agreement & submission
4. Confirmation

Use this form to authorize or revoke access to your electricity or gas usage data. An authorization will disclose the data to your building owner(s) or landlord(s).

General account information

*required field

*PG&E account number

*Customer verification Phone number
 Meter number

Please provide either a phone number or meter number for verification

(415) 555-5555

*Security

Please verify that you are not a robot.

I'm not a robot

[Cancel](#)

- Enter your 10-digit Account Number. Exclude the – digit when entering the data.
- Select either the Phone Number or Meter number button based on the information that you will be entering
- Once the data is entered, complete the Security check and then click the Next button.

4. On the next page, the radio button to authorize the release of data is selected as a default

General account information

*I, SMITH, JENNIFER, Account ID: 123456789

Authorize disclosure of energy usage and cost of service addresses identified below
 Revoke all authorizations of disclosure of energy usage and cost of service addresses identified below

Service Agreement ID

*Select one or more Service Agreement ID(s)

<input type="checkbox"/>	Service Agreement ID(s)	Service Type	Meter	Service Address
<input type="checkbox"/>	9876543210	Electric	1001234567	100 Main San Jose
<input type="checkbox"/>	6543216541	Gas	4144444	100 Main San Jose

- The Authorize Disclosure option is pre-selected. If you would like to revoke any existing Benchmarking Data Authorizations, select the Revoke button.
- Check the boxes next to each Service Agreement/ Meter ID that you would like to share or revoke data for.

5. Select the Service Agreements for the meter(s) you intend to authorize for release by clicking the checkbox in the Select column

- Type the BMP Building ID into the Property Owner Selection Field. This will present the BMP Building information. If you do not see the building, **re-type the Building ID**, or confirm the building has been created in the Benchmarking Portal.

Aggregate building data

Note: for customers with CCA supply charges, the total energy costs (PG&E costs + CCA costs) will be provided for California Assembly Bill 802 (AB802), the "Building Energy Use Benchmarking and Public Disclosure Program."

Authorized property owner selection

Enter the 10-digit Building ID provided to you by the requester into the search box. Then select the requester to whom the data should be released to.

[Learn more about aggregated building data](#) →

*Select up to ten third parties

Building ID

<input type="checkbox"/>	Building ID(s)	Address	Name
<input type="checkbox"/>	6758346644	123 Main Street, San Jose	Smith, Jennifer

Next

[Back](#)

[Cancel](#)

- In order to populate the Building ID field, the person performing Benchmarking must have completed mapping their premise meters. This will create a unique 10-digit BMP Building ID number. Entering this number in the Building ID field should result in the Building information to present below the field.
- Once the building information is presented, click the checkbox next to the property and click the Next button.
- If an error presents, please confirm with the Service Provider performing benchmarking that the BMP Building ID is correct, and re-enter as needed.

- Click on the address presented in the pop-up to add the property to the Authorized Property Owner Selection pane.
- Populate your email address on form, agree to the Terms & Conditions and select Continue.

You will receive confirmation that the data authorization form has been successfully submitted. Authorizations process within 24 hours. Once the authorization has processed, you will notice the removal of the Authorization banner and find that the "Auth Required" note has been replaced by "Authorized"

Gas Services		Electric Services	
No.	Auth Status	No.	Auth Status
1	Authorized	1	Authorized

Attempts to request data from ESPM before the data authorization process is completed will result in a data sharing failure. Please wait 24 hours until the authorizations have fully processed before requesting usage data.

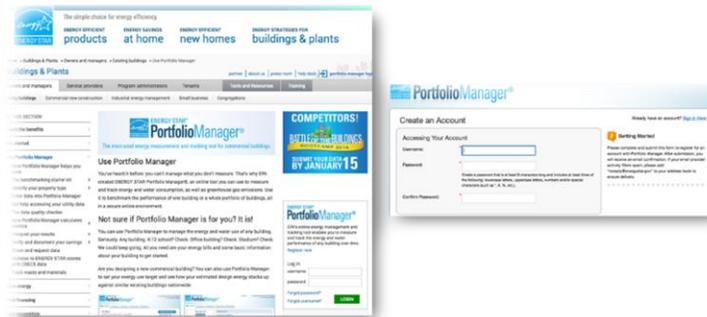
Section 3 | Setup your ENERGY STAR Portfolio Manager Property

After you have completed your BMP building setup, and any required authorizations, it is time to set up your ESPM Property.

These instructions apply to **NEW** users that do not have an existing ESPM Property connected to the Whole Building Program connection (pge_agg_benchmark). If you have an existing profile, currently connected to PG&E's legacy Individual Meter Sharing Program connection (pacificgaselectric) please proceed to **Section 6** for instructions on how to convert your existing property for data sharing with our Whole Building Program.

To get started you will need to setup an ESPM Account:

- Go to the ENERGY STAR® Portfolio Manager Login page (www.energystar.gov/portfoliomanager) and click **Register Now**.
- Fill out the required information (fields marked with red asterisk). When complete, click **Create My Account**.
- Portfolio Manager's default (Yes for Searchability) allows others to search for your account, to facilitate making Contact Connections. Do not change this default setting if you intend to enroll in PG&E's Web Services.
- Finally, click **Create My Account** to complete the registration process.



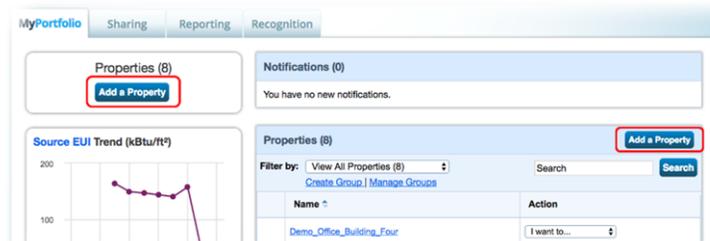
3.1 How to create Property profile in ESPM

To benchmark your building with the ENERGY STAR Portfolio Manager, you will need to create a profile that has basic information about the property.

Have the basic information describing your building, such as

- Gross Floor Area
- Year built
- How you would classify your building's primary use (e.g., Office)

1. From the My Portfolio tab, add a property by clicking **Add a property** box to get started



2. Enter your property's primary function, number of buildings, and construction status. Then click Get Started

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!

Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Office

[Learn more about Property Types.](#)

Your Property's Buildings

How many physical buildings do you consider part of your property?

None: My property is part of a building
 One: My property is a single building
 More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?

Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
 Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
 Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

Tip

To set up a property, you'll need information such as gross floor area and operating hours.

Tip

Not sure what kind of property you are? Because we focus on school building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or make it to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and tables or not, depending what your needs are. This can be configured on your [Account Settings](#).

Get Started! [Cancel](#)

3. Enter the property name and full address carefully.

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name:

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

Tip

The name you choose for your property does not have to be unique. BUT, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

4. Finish entering the building data, then click Continue

Postal Code:

Year Built:

Gross Floor Area: Sq. Ft. ± Temporary Value

Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. [Details on what to include.](#)

Irrigated Area: Sq. Ft. ±

Occupancy: %

Do any of these apply?

My property's energy consumption includes parking areas
 My property has a Data Center that requires a constant power load of 75 kW or more
 My property has one or more retail stores
 My property has one or more restaurants/cafeterias

Tip

Answering these simple questions will help us guide you in entering your property correctly.

Continue [Cancel](#)

5. Enter the specific details requested. These may be changed later, if needed.

6. When you finish entering your building details, click **Add Property** to finalize your building profile. The green banner confirms your successful completion of the property set up.

Parking Use [Edit Name](#) [Delete](#)

Parking refers to buildings and lots used for parking vehicles. This includes [open parking lots](#), [partially enclosed parking structures](#), and [completely enclosed or underground parking structures](#). Parking structures may be free standing or physically connected to the property.

Property Use Detail	Value	Current As Of	Temporary Value
Open Parking Lot Size	<input type="text" value="0"/> <small>Sq. Ft. ±</small>	1/1/1975	<input type="checkbox"/>
Partially Enclosed Parking Garage Size	<input type="text" value="5000"/> <small>Sq. Ft. ±</small>	1/1/1975	<input type="checkbox"/>
Completely Enclosed Parking Garage Size	<input type="text" value="0"/> <small>Sq. Ft. ±</small>	1/1/1975	<input type="checkbox"/>
Supplemental Heating	<input type="text" value="No"/> <input type="checkbox"/> Use a default	1/1/1975	<input type="checkbox"/>

Add Property [Cancel](#)

MyPortfolio [Sharing](#) [Reporting](#) [Recognition](#)

Congratulations! You have successfully created your property.
 Next, you can:

- [Add energy use information](#), so that you can see your energy performance metrics.

3.2 Setting up Energy Meters

To receive data from the BMP, **you can only have two virtual Energy Meters connected to PG&E**: one natural gas and one electric meter. The system can only share data with one electric meter and one natural gas meter. PG&E will aggregate the net usage for the meters included in your BMP Portal building definition and post the data for each commodity into the meters that you create in this process. Creating/connecting additional meters may interfere with accurate data sharing.

To get started:

1. Click the **Energy** tab
 - Click **Add a Meter**
 - Choose Electric or Natural Gas: **No other meter types are supported.**
 - Choose the energy source (e.g., from the grid for electric)
 - Choose the Units – For Electric, select kWh, for natural gas, select Therms)
 - Users can name the Meters whatever works best. However, we recommend adding “Aggregate” in the name
 - Set Date Meter Became Active to January 1, two years prior to the current date, regardless of when your actual meters became active. For example, if you are creating your meters in 2024, please set the start date to January 1, 2022.
 - Click “Add Another Entry” and create second meter with other commodity not used
2. After creating one electric and one natural gas meter, click the CREATE METERS button, then click CONTINUE
3. Next, select ***These meter(s) account for the total energy consumption button***
4. Click the APPLY SELECTIONS button

When completed, **you should have only two meters**. Sample photo below:

Meters - Used to Compute Metrics (2) Add A Meter

[Change Meter Selections](#)
[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Aggregate - Electric Grid Meter 35868969	Electric - Grid		Yes
Aggregate - Natural Gas 35868970	Natural Gas		Yes

[Download Annual Totals by Meter](#)

If you have more than one electric and / or more than one natural gas meter(s), go back and delete your extra meter(s).

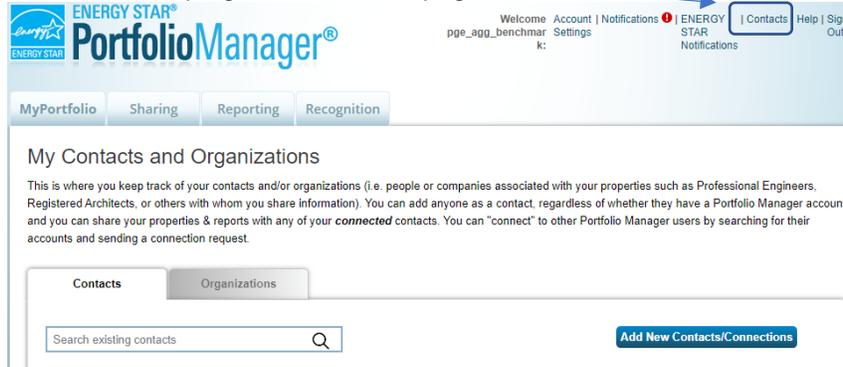
The system will not work properly if you have more than one shared meter per commodity.

3.3 Connect with PG&E in ESPM

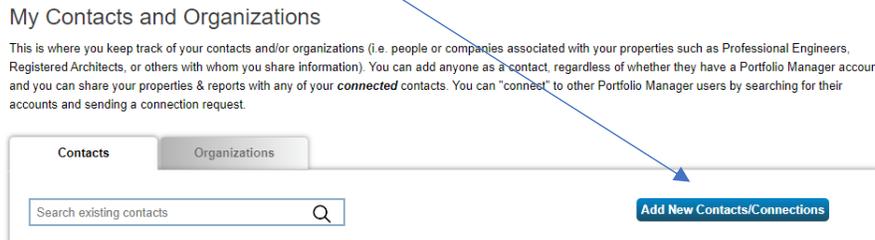
To establish a connection between ESPM and the BPM, you will need to connect with PG&E's ESPM account then share your ESPM Property with PG&E. If your account is already connected to PG&E's Whole Building Benchmarking connection; pge_agg_benchmark you can skip this step.

The first step is to connect with PG&E as a Portfolio Manager contact.

1. Click on the **Contacts** link on the top right corner of the page



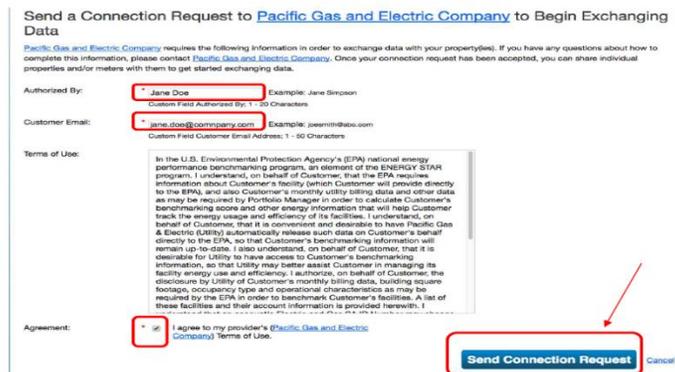
2. Click the **Add New Contacts/Connections** button.



3. Enter Pacific Gas and Electric in the Name Field and select Search. When the page refreshes, Pacific Gas and Electric Whole Building (pge_agg_benchmark) will appear on the right side of the page. Click Connect.



4. Enter User Account info
5. Read and Agree to PG&E's Terms of Use and select **Send Connection Request**



Public

Public

The top of the next page shows a green banner confirming that your Connection request was sent to PG&E's Whole Building Account.

NOTE: PG&E has two ESPM accounts. Make sure you only send a connection request to Pacific Gas and Electric Whole Building at **pge_agg_benchmark**. Connection requests are processed in batch and should be completed within 24 hours. You will receive a notification in your ESPM account when the request has been completed.

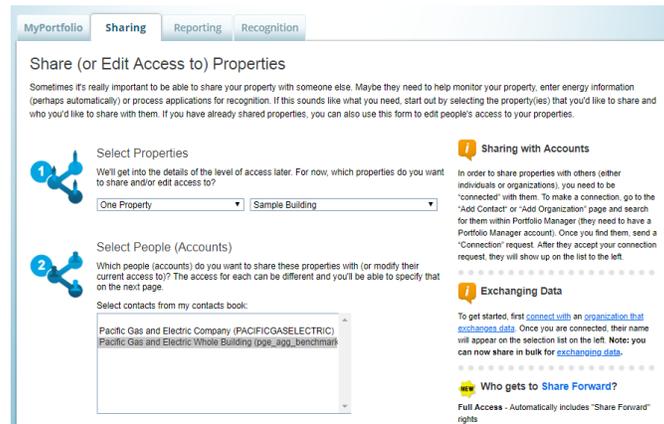
3.4 Share your Building and Meters with PG&E

After you receive confirmation that the connection request has been accepted, next you will share your ESPM Property with PG&E. Please have your BMP Building ID and BMP User ID available for this step. This is how PG&E will link your building definition for data-sharing to this ESPM property.

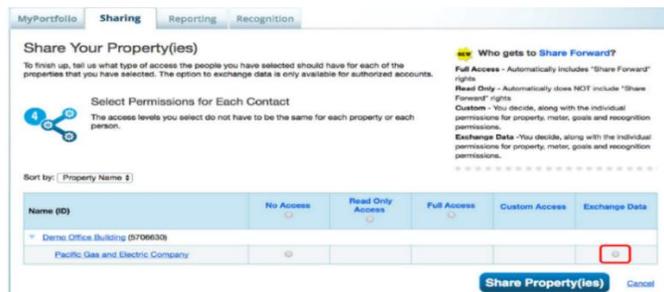
1. Click the Sharing tab



2. Click the Share (or Edit Access to) a property button
3. Select One Property (you can only share one Property at a time)
4. Select the specific Property
5. Select Pacific Gas and Electric Whole Building (pge_agg_benchmarking) from list of contacts



6. For Permissions, choose Personalized Sharing & Exchange Data (“Custom Orders”) and click Continue
7. Under Select Permissions, select the radio button in the Exchange Data Column



8. When you select the Exchange Data Radio Button, a Pop-Up window will open

For this next step, you will need information from your BMP Building Detail page; log into BMP and navigate to the Building Detail page of your building

9. Enter your Building ID from the BMP
10. Enter your User ID from the BMP
11. For Property Information, select Full Access – DO NOT SELECT READ ONLY
12. For your Electric and Natural Gas meter select Full Access - DO NOT SELECT READ ONLY
13. Set Goals and Recognition to Full Access or None – DO NOT SELECT READ ONLY

Select Access Permissions to [Sample Building for Pacific Gas and Electric Whole Building](#)
 The following information is required by Pacific Gas and Electric Whole Building in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Building ID: Example: 0123456789
Building ID provided in Pacific Gas and Electric Building Benchmarking Portal: 10 - 10 Characters

User ID: Example: 7654321
User ID provided in Pacific Gas and Electric Building Benchmarking Portal: 7 - 7 Characters

Select the permission level below that you would like to grant [Pacific Gas and Electric Whole Building](#) 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			
▼ Energy Meters			
Aggregate Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Aggregate Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

14. Set your aggregate meters sharing to Full Access. REMINDER – Check that only two meters (1 electric and 1 natural gas) are set to Full Access. If your building has any other meters listed in ESPM, these should be set to **None**.

Do not select Read Only for any setting. That will override the sharing permissions and interfere with data-sharing

15. For Share Forward, check the radio button for No
16. Click on the Apply Selections and Authorize Exchange button

Select Access Permissions to [Sample Building for Pacific Gas and Electric Whole Building](#)

▼ Energy Meters			
Aggregate Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Aggregate Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Recognition	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Additional Options:

Item	Yes	No
* Share Forward Allow Pacific Gas and Electric Whole Building 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](#)

17. On the next page, click Share Property(ies) to complete the data exchange request

A green banner will appear at the top of the page confirming that your site sharing request was submitted.

NOTE: Sharing requests are processed in batch and should be complete within 24 hours. You will receive a notification in your ESPM account when the Share has been accepted

Section 4 | Un-share / Re-share

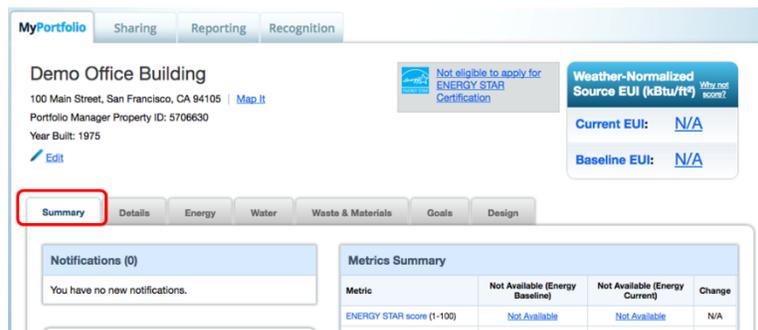
Once you have completed the BMP and ESPM setup, your data will be uploaded in 10 – 15 business days. However, if you want to retrieve data sooner you can jumpstart the data upload by re-sharing the building.

While not required, the “re-share” kickstarts your data upload and allows your data to arrive within twenty-four hours. If you skip this step, data will upload in 10 – 15 business days at the next monthly data load. Please note that use of the Unshare/Reshare process may result in duplicate (overlap) records if a monthly record is already present, creating an OVERLAP condition in ESPM. If this occurs, PG&E’s recommendation is to retain the record received in the most recent data share.

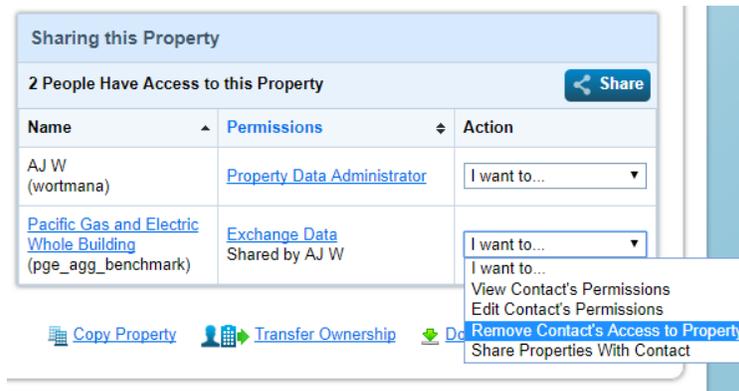
4.1 Un-share / re-share your building

To get started

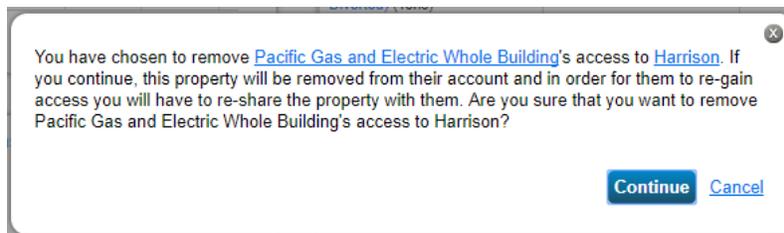
1. Go to the **Summary** tab of your property profile in Portfolio Manager



2. Under the Summary tab, go to “**Sharing this Property**” section. In the “I want to...” dropdown box to the right of Pacific Gas and Electric Company (pge_agg_benchmark), choose **Remove Contact’s Access to Property**.



3. A pop-up window will ask you to confirm removal of PG&E’s access to this property. Click **Continue**.
4. When the page refreshes, PG&E will no longer appear in the list of Contacts who have access to your building.



Next we will establish a fresh site share connection with PG&E. If you do not successfully complete this step, data will not share to your ESPM Property, and PG&E support teams will not have visibility to your property in the event troubleshooting is needed.

5. Click the “Sharing” tab at the top of the page



6. Click the Share (or Edit Access to) a property
7. Select the Property you wish to Re-share
8. Select the pge_agg_benchmark contact for re-sharing
9. Select “Personalized Sharing & Exchange Data (“Custom Orders”), click Continue
10. Select the Exchange Data radio button
11. A pop-up screen will appear, and should already be populated with the Building ID and User ID
12. Set Property Information, Aggregate Electric, and Aggregate Natural gas to Full Access
13. Set Goals and Recognition to Full Access or None
14. Confirm nothing is set to Read Only

Select Access Permissions to **Demo Office Building** for Z.PGAE.
The following information is required by Z.PGAE, in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Building ID: * 1234567890 Example: FG 323
Building ID, 1 - 12 Characters [More Information](#)

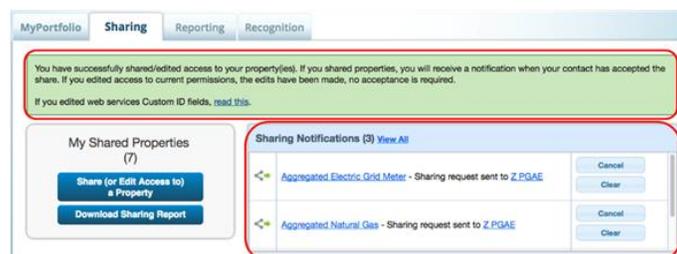
User ID: * 1234567 Example: FG 323
User ID, 1 - 7 Characters [More Information](#)

Select the permission level below that you would like to grant Z.PGAE 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	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Energy Meters	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Aggregated Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Aggregated Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

15. Finally, click the Apply Selections and Authorize Exchange button, and then select Share Property. You will see a confirmation message displayed on the completion of this step

Once you complete the un-share / re-share energy usage data will upload **within 24 hours**



Congratulations! You have successfully set up your Building in the BMP and ESPM. To confirm an accurate setup, please review our Benchmarking Portal Checklist in Section 5.

If you need support, submit your question along with your Building ID and ESPM Property ID to benchmarking@pge.com

Section 5 | Checklist

If you have completed all the steps above, but are not seeing data in your ESPM Property, please review the following checklist. Key steps are highlighted that, if missed, will impact the data upload.

5.1 Review your Building Benchmarking Portal Setup

Log into your BMP Account, and select your Building

1. Review the Premises mapped to your Building
 - Confirm the Premises mapped to your building are addresses that match your building
 - Review the total number of active meters at your building

Premises				
Premise Address	Gas Services		Electric Services	
	No.	Auth Status	No.	Auth Status

[View Meter IDs: Gas: 1 Electric: 1](#)

Remember, this number totals *active* meters. If your building has any meters that are currently inactive (e.g., no tenant) that meter will not be reflected in this total, but will be added once it is active again

- Finally, click [View Meter IDs](#) to review the Meter #'s of the meters you selected
 - If you need to remove Premises, select UPDATE MAPPING button, de-select the Premise you wish to remove, then click the Save Updates button.
2. Confirm that the Electric and Gas meters have been connected to ESPM. The BMP Portal will display the ESPM property that is linked to your BMP Building. Confirm that you have connected to the correct ESPM Property. NOTE: If you only have one commodity present in your building definition (i.e., electric meters only and no gas), the absent commodity will always reflect NOT LINKED. This condition will not impact data sharing for the commodity that is present.

Meter Status
Gas : Linked to Portfolio Manager account
Electric: Linked to Portfolio Manager account

- If either status is **Not Linked**, with the exception noted above, you will need to review your ESPM Setup on Pg. 19 (section 3.4), and confirm you created only one meter each for electric and natural gas
3. Confirm that no meters require Authorizations

Gas Services		Electric Services	
No.	Auth Status	No.	Auth Status
1	Authorized	1	Authorized

- If you see an **Auth Required**, the meter has not been authorized for release
- Review Section 2 for how to obtain data authorizations and complete as needed

If your Building:

- Has all intended premises mapped
- Shows correct commodities as linked to Portfolio Manager Account for the appropriate ESPM Property ID
- If applicable, required meters are authorized

Your setup in the Benchmarking Portal is complete.

5.2 Review your ESPM Setup

Log into your ESPM Account, and select your property, and select the Energy Tab

1. Confirm you have created 1 electric and 1 natural gas meter.

Meters - Used to Compute Metrics (2)

[Add A Meter](#)

[Change Meter Selections](#)

[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Aggregate - Electric Grid Meter 35868969	Electric - Grid	12/31/2017	Yes
Aggregate - Natural Gas 35868970	Natural Gas	12/31/2017	Yes

[Download Annual Totals by Meter](#)

- If you have created more than one meter for electric and / or natural gas, you will need to delete the meter(s) so that there is only one electric and natural gas meter each

NOTE: If you were previously connected to PG&E's AB 1103 Individual Meter Setup, you do not need to delete any meters. You will need to mark them as Inactive and remove your connection with PACIFICGASELECTRIC. Refer to Section 6 for guidance.

2. Check the Sharing Permissions of your ESPM Property with pge_agg_benchmark

- Go to the "Sharing this Property" box at the bottom right of the Summary tab

Sharing this Property		
2 People Have Access to this Property		Share
Name	Permissions	Action
AJ W (wortmana)	Property Data Administrator	I want to...
Pacific Gas and Electric Whole Building (pge_agg_benchmark)	Exchange Data Shared by AJ W	I want to...

- Make sure you have shared with [Pacific Gas and Electric Whole Building \(pge_agg_benchmark\)](#) and that the Permissions are set to [Exchange Data](#)
- Next, click [Exchange Data](#) and confirm that
 - Property Information is set to **Full**
 - Aggregate Electric is set to **Full**
 - Aggregate Natural Gas is set to **Full**
 - Goals, Improvements, & Checklists is set to **Full or None**
 - Recognition is set to **Full or None**

Item	Permissions
Property Information	Full
▼ All Meter Information	None
Aggregate Electric	Full
Aggregate Natural Gas	Full
Goals, Improvements, & Checklists	Full
Recognition	Full
Share With Others	No

Public

Public

- If you have any other meters at the building (e.g., other utility or water meter), these **must** be set to **None**
- Do not have anything set to **Read Only** – this will override other settings

NOTE: If you are not connected with pge_agg_benchmark, you will need to review Section 3 for instructions on how to connect with the proper PG&E ESPM Account; pge_agg_benchmark

3. If you need to make any changes in ESPM, click the Sharing tab
 - Click Share (or Edit Access to) a property
 - Select “One Property”
 - Select the Property to edit
 - Select Pacific Gas and Electric Whole Building (pge_agg_benchmark) connection
 - Select Personalized Sharing & Exchange Data (“Custom Orders”)
 - Select Continue
 - Select “Edit”
 - Update the Permission settings to:

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

NOTE: Goals, Improvements, & Checklists, and Recognition and can be set to either Full Access or None. Certain settings will default Goals to None. If that happens, keep it at None.

- Select “No” for Share Forward
- Click the Apply Selections & Authorize button
- Click the Share Property(ies) button

Section 6 | Editing an ESPM Account setup with individual meter sharing (AB 1103)

PG&E's Legacy Benchmarking Program for Individual Meter Sharing is being retired. If you have shared your ESPM Property with PG&E to receive individual meter data (AB 1103), you need to edit to your ESPM Property to begin receiving aggregate data from the BMP. Failure to convert to the Whole Building Benchmark Program may result in an interruption of data-sharing for accounts under the pacificgaselectric connection.

Please have your BMP Building ID and BMP User ID available for this process. This is how PG&E will link your building definition for data-sharing to this ESPM property.

6.1 Adjust existing ESPM Connection with PG&E

If your ESPM Property has existing individual meter connections, you will need to edit and update these meters to **Inactive**. This ensures that double counting of energy consumption does not occur. Also, as an option, it is recommended to remove access to the PACIFICGASELECTRIC ESPM account.

Step 1: Make existing meters Inactive

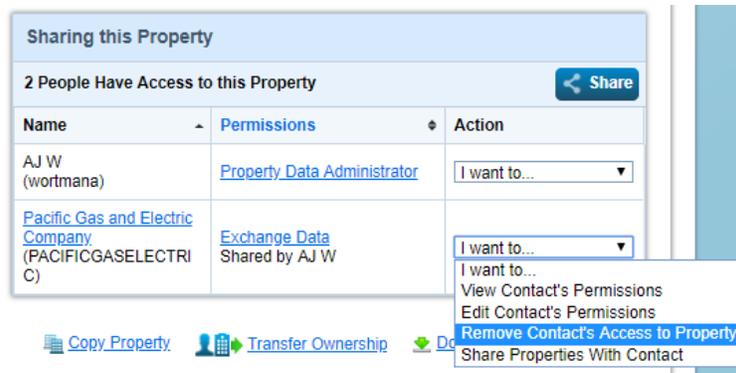
1. Click the Energy tab
2. Click on an existing meter that is receiving data from PACIFICGASELECTRIC
3. Click on the Basic Meter Information banner
4. Uncheck the **Still in Use** box
5. Indicate January 1 of last year for Date Meter Became Inactive, and select the Save Changes button

The Benchmarking Portal will ***ONLY*** upload data from January 1 of last year – present date of this year

6. Repeat steps for the remaining connected meters

Step 2 (optional): Remove PACIFICGASELECTRICs access to your property

1. Click the Summary tab
2. Scroll down to the Sharing this Property box
3. Click "I want to..." next to the Pacific Gas and Electric (PACIFICGASELECTRIC) contact and select "Remove Contact's Access to Property"



4. Select "Continue" when the confirmation pop-up appears

Note: Do not delete any old meters. Change individual meters to "Inactive" and remove access to the Property for PACIFICGASELECTRIC. This ensures that you retain any historical data that has already been entered for those meters as needed.

Next, you need to create two new meters. To receive data from the BMP, **you can only have two Energy Meters**: one natural gas and one electric meter. Or one meter if you only receive service for one commodity from PG&E.

6.2 Create Two New Meters

1. Click the **Energy** tab
 - Click **Add a Meter**
 - Choose Electric or Natural Gas: **No other meter types are supported.**
 - Choose the energy source (e.g., from the grid for electric)
 - Choose the Units – For Electric, select kWh, for natural gas, select Therms)
 - Users can name the Meters whatever works best. However, we recommend adding “Aggregate” in the name
 - Set Date Meter Became Active to January 1 of the prior year regardless of when your actual meters became active
 - Click “Add Another Entry” and create second meter with other commodity not used
2. After creating one electric and one natural gas meter, hit Create Meters, then Continue
3. Next, select These meter(s) account for the total energy consumption button
4. Click Apply Selections

When complete, you should **only have two new meters** (sample below)

Meters - Used to Compute Metrics (2) [Add A Meter](#)

[Change Meter Selections](#)
[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Aggregate - Electric Grid Meter 35868969	Electric - Grid		Yes
Aggregate - Natural Gas 35868970	Natural Gas		Yes

[Download Annual Totals by Meter](#)

NOTE: It is important that you set the Date Meter Became active for the two aggregate Meters to January 1 of last year. Also, make sure you set the Date Meter Became Inactive for the old meters to January 1 of last year.

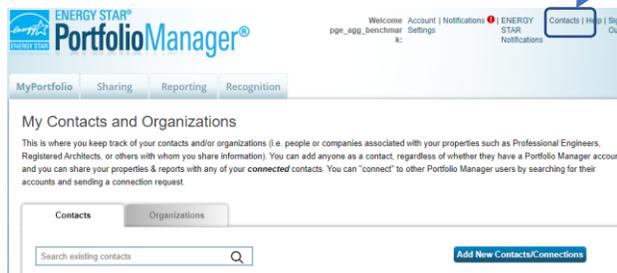
After you have updated the existing meters in the Property, return to the **Energy** tab: Review that you **only have the two active meters** (Aggregate meters). You are now ready to Connect and Share the Property with PG&E’s Aggregate ESPM Account

6.3 Connect with PG&E’s Aggregate ESPM Account

To establish a connection between ESPM and the BPM, you will need to connect with PG&E’s ESPM account then share your ESPM Property with PG&E. If you have already added PG&E’s Whole Building Connection; pge_agg_benchmark, you will not need to complete this step and can proceed to Step 6.4

The first step is to connect with PG&E as a Portfolio Manager contact.

- Click on the **Contacts** link on the top right corner of the page



- Click on the Add New Contacts/Connections button.

My Contacts and Organizations

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.

- Search for PG&E by entering Pacific Gas and Electric and then click the Search button.
- When the page refreshes, **Pacific Gas and Electric Whole Building (pge_agg_benchmark)** will appear on the right side of the page. Click **Connect**

- Enter User Account info
- Read and Agree to PG&E's Terms of Use **Send Connection Request**

NOTE: PG&E has two ESPM accounts. Make sure you only send a connection request to Pacific Gas and Electric Whole Building

The top of the next page shows a green banner confirming that your Connection request was sent to PG&E's Whole Building Account

NOTE: PG&E must process your connection request. This typically takes less than 24 hours, and you will receive notification in your ESPM Account when completed. After you receive confirmation, you will now share your Property and Meters with PG&E to begin receiving data.

6.4 Share your Building and Meters with PG&E

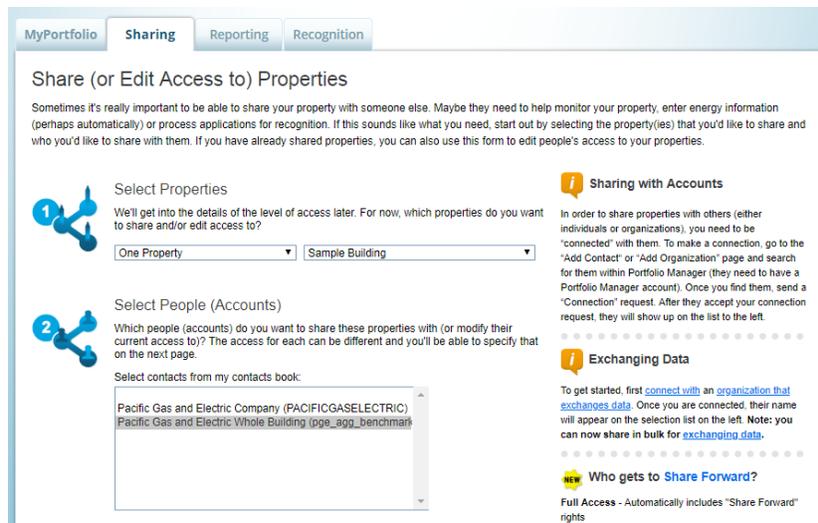
After you receive confirmation that the connection request has been accepted, it is time to share your ESPM Property with PG&E

- To start, click the Sharing tab

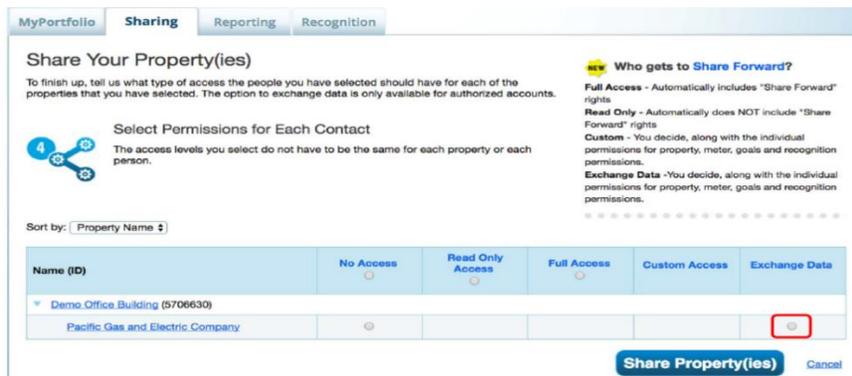


- Click **Share (or Edit Access to) a property**
- Select **One Property** (you can only share one Property at a time)
- Select the specific Property
- Select **Pacific Gas and Electric Whole Building (pge_agg_benchmarking)** from list of contacts

See sample photo below:



- For Permissions, choose **Personalized Sharing & Exchange Data (“Custom Orders”)** and click Continue
- Under Select Permissions, select the radio button in the Exchange Data Column



Public

Public

When you select the Exchange Data Radio Button, a Pop-Up window will open to populate the sharing permissions.

For the next step, you will need information from your BMP Building Detail page; log into BMP and navigate to the Building Detail page of your building

- Enter your Building ID from the BMP
- Enter your User ID from the BMP
- For Property Information, select **Full Access**
- For your Electric and Natural Gas meter select **Full Access**
- Set Goals and Recognition to **Full Access** or **None**

Select Access Permissions to [Sample Building](#) for [Pacific Gas and Electric Whole Building](#).
The following information is required by [Pacific Gas and Electric Whole Building](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Building ID: Example: 0123456789
Building ID provided in Pacific Gas and Electric Building Benchmarking Portal; 10 - 10 Characters

User ID: Example: 7854321
User ID provided in Pacific Gas and Electric Building Benchmarking Portal; 7 - 7 Characters

Select the permission level below that you would like to grant [Pacific Gas and Electric Whole Building](#) 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			
▼ Energy Meters			
Aggregate Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Aggregate Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You can only select **Full Access** for your one Electric and one Natural Gas meter. If you have additional meters, they must be set to **None**

Do not select Read Only for any setting. That will override the sharing permissions

REMINDER – Check that only two meters (1 electric and 1 natural gas) are set to **Full Access**. Every other meter should be set to **None**, and nothing should be set to **Read Only**.

- For Share Forward, check the radio button for **No**
- Click on **Apply Selections and Authorize Exchange**

Select Access Permissions to [Sample Building](#) for [Pacific Gas and Electric Whole Building](#).

▼ Energy Meters			
Aggregate Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Aggregate Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Recognition	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Additional Options:

Item	Yes	No
* Share Forward Allow Pacific Gas and Electric Whole Building 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](#)

- On the next page, click **Share Property(ies)** to complete the data exchange request

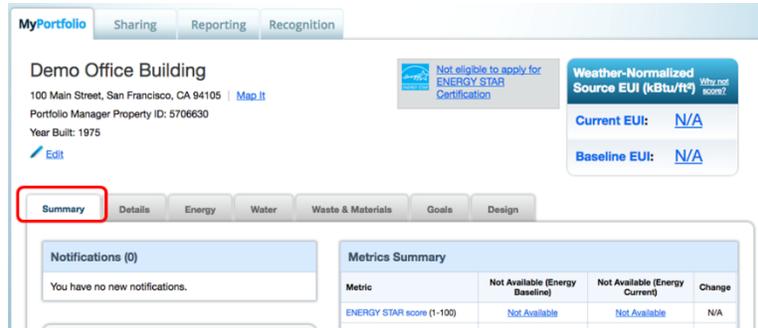
A green banner will appear at the top of the page confirming that your site sharing request was submitted. Sharing requests usually take less than 24 hours to process

NOTE: Your building is not yet shared with PG&E Whole Building. The request needs to process, and you will receive a notification in your ESPM account when the Share has been accepted.

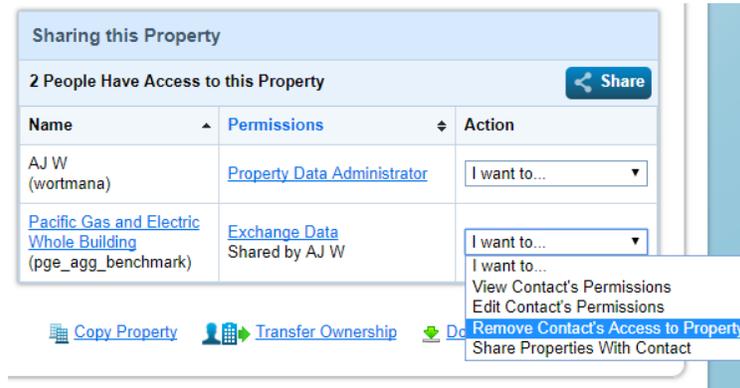
6.5 Un-share / Re-share

While not required, a recommended last step is to Un-share and Re-share the Property in ESPM. The “re-share” kickstarts your data upload and allows your data to arrive within 24 to 48 hours (about 2 days). If you skip this step, data will be uploaded in 10 – 14 business days.

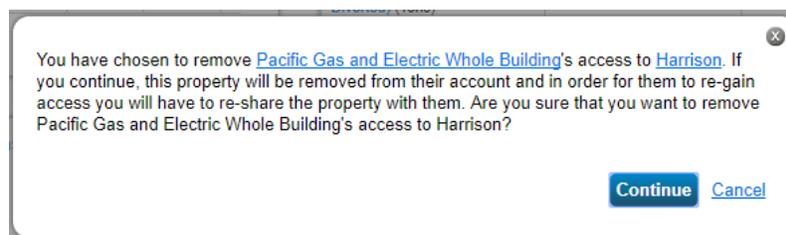
- Go to the **Summary** tab of your property profile in Portfolio Manager



- Under the Summary tab, go to “**Sharing this Property**” section. In the “**I want to...**” dropdown box to the right of Pacific Gas and Electric Company (pge_agg_benchmark), choose **Remove Contact’s Access to Property**



- A pop-up window will ask you to confirm your intentions to remove PG&E’s access to this property. Click the CONTINUE button.
- When the page refreshes, PG&E will no longer appear in the list of Contacts who have access to your building
- Next we will establish a fresh site share connection with PG&E



- Click the “Sharing” tab at the top of the page



- Click the SHARE OR EDIT ACCESS TO A PROPERTY button.
- Select the Property you wish to Re-share
- Select the **pge_agg_benchmark** contact for re-sharing
- Select “Personalized Sharing & Exchange Data (“Custom Orders”), click Continue
- Select the Exchange Data radio button
- A pop-up screen will appear, and should already be populated with the Building ID and User ID
- Set Property Information, Aggregate Electric, and Aggregate Natural gas to **Full Access**
- Set Goals and Recognition to **Full Access** or **None**
- Confirm nothing is set to Read Only

Select Access Permissions to **Demo Office Building** for Z.PGAE.
The following information is required by Z.PGAE in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Building ID: * 1234567890 Example: FG 323
Building ID: 1 - 12 Characters [More Information](#)

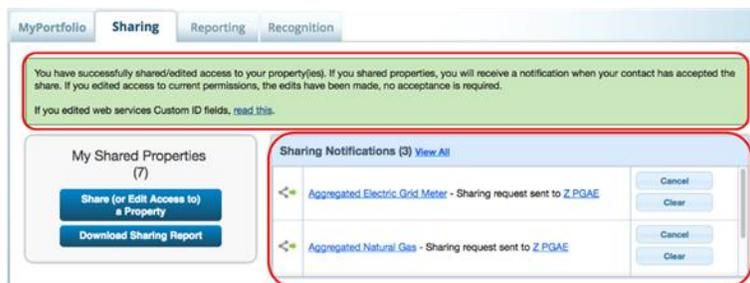
User ID: * 1234567 Example: FG 323
User ID: 1 - 7 Characters [More Information](#)

Select the permission level below that you would like to grant Z.PGAE 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			
Energy Meters			
Aggregated Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Aggregated Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

- Then, click the APPLY SELECTIONS AND AUTHORIZE EXCHANGE
- Finally, click the SHARE PROPERTY button.

Once you complete the un-share / re-share energy usage data will upload within 24 hours



Congratulations! You have successfully set up your Building in the BMP and ESPM. To confirm an accurate setup, please review our Benchmarking Portal Checklist in Section 5.

If you need support, submit your question along with your Building ID and ESPM Property ID to benchmarking@pge.com

Section 7 | FAQs

PG&E Building Benchmarking Portal

Building Registration

Q: Are there any special rules for account profile creation?

A: Yes, if you have a PG&E My Energy Account, you cannot reuse these Sign In credentials. Your User ID and Log In should be unique to the Benchmarking Portal. If you attempt to re-use credentials, you may receive an Unauthorized User error message and will need to create a new Benchmarking Account.

Q: What should I have before I submit a building registration request?

A: Gather as much information about the meter and premises as possible:

- Take a physical inventory of the meters at the facility
- Review utility billing statements to obtain Account Premise addresses, Account ID's, Service Agreement ID's, and Meter ID information

Q: What sort of documents can I upload in support of my registration request?

A: For **Agent** (3rd Party Service Provider) Profiles, a dated Letter of Authorization allowing the release of aggregate data for Benchmarking purposes that includes basic property information, e.g., address being benchmarked, PG&E account information etc. Property Tax documents or PG&E Bill Statements are insufficient authorization documents for AGENT profiles. Failure to provide specific premise details may result in a delay of approving your registration request

A: For **Owner** profiles, property ownership documents, (Property tax documents, PG&E Bill Statements etc.,) will suffice

Q: What document formats are acceptable for upload

A: Word Documents .doc, docx, or PDF are accepted

Q: How will I know the status of my Registration Request?

A: Most building registrations are approved within 3- 5 business days. You will receive an email when the status is updated to APPROVED or ON HOLD

Q: I was just informed that my Registration is ON HOLD, what should I do?

A: If a Registration is put ON HOLD, the requestor will be notified of the issue and remediation steps. In most instances, uploading additional supporting documentation to your Registration may be requested.

Building Definition

Q: Why are no Premises listed after I click UNDEFINED?

A: If no premises are listed, you will need to perform a Premise Search to locate the correct facilities to add to your building definition.

Q: What should I do if I am searching for my premises, but no results are returned?

A: It is recommended to search with the Street Number, Street Name and City

- Leave off all ROAD, STREET, WAY etc., designations
- For directional indicators (North, South), try variations N, S,
- Do not use punctuation if abbreviating e.g., W El Camino Real
- Try variations that do not include Apartment Numbers

Q: What if I try address variations and premises still are not located?

A: Confirm the address information using a Utility Billing Statement. The Service Address will match the address in the Benchmarking Portal.

Q: What do I need to do if I have found the address, but it says it is already MAPPED?

A: The Benchmarking Portal does not allow premises to be mapped to multiple facilities. If an address says that it is Mapped, it is unavailable to add to your building until it is unmapped (released) from another building definition. If you believe you should have access to the property for Benchmarking, contact Benchmarking@pge.com for assistance. You should provide the exact address that is shown mapped. You may be asked to have the building Owner or Property Manager contact the Benchmarking team directly and indicate that you are the party authorized to perform benchmarking.

Q: Sometimes when I search for Premises, I get a SERVICE UNAVAILABLE message. What happened?

A: If your Premise search will return many facilities, e.g., an apartment building, the system may time-out while processing the query. Please, log out of your browser, clear your cache, and reattempt the request. Our apologies for the inconvenience.

Q: I search my premises, but I know there is more than what was returned in the results. Where are they?

A: If your premise results return more than 50 matches, a SHOW MORE icon will display next to PREMISES. Click this icon to display the next 50 matches and so on until all results are displayed. Once the link disappears, all the premises have been displayed. Else, review your query to make sure it accurately reflects your premise address.

Authorizations

Q: Why do I need to get Authorizations for data release if the data is Aggregated?

A: Because PG&E is releasing data to a third party (ESPM), authorizations are needed if the number of services does not meet data aggregation standards, even if the meters are in your name.

Q: Can Authorization requirements be waived since the data is aggregated?

A: Authorizations if required, cannot be waived.

Q: Does it matter at which point in the process I complete the Authorizations?

A: Yes. Data Authorizations, if required, should be completed before you connect your ESPM Property with PG&E's pge_agg_benchmark profile in ESPM so that when the request to share data is received the authorizations are on file.

Q: I have input my Building ID into the Authorization form, but my building does not show, what should I do?

A: Confirm that the correct Building ID has been entered. Once the correct Building ID is entered a pop-up box should display with the ability to select your building. If you do not see this pop-up box, review your browser settings to allow for pop-ups.

Q: What do I do if I have submitted authorizations, but my profile says there are still AUTHORIZATIONS NEEDED?

A: Ensure that the person completing the Authorization has access to your Benchmarking Building ID. If that information is not populated your authorization cannot be processed. In some instances, the BMP Portal may display that authorizations are needed even after they have been completed. If you are concerned about the status, please contact benchmarking@pge.com for assistance.

Q: How long does it take to process Authorizations?

A: Once submitted, Authorizations may take up to 24 hours to fully process. Once the Authorization has been processed, you will notice the removal of the Authorization Banner message from your profile and the Auth Status for the service has been updated to "Authorized." Sharing your building from ESPM before authorizations have fully propagated PG&E systems may result in a failure to share data.

Data Sharing

Q: What should I do if I have completed and confirmed everything, and the data is not shared?

A:

- Please confirm that your ESPM Sharing settings are correctly configured and there are no READ ONLY settings present
- Please review all your premise data in your Benchmarking Portal profile, including selecting SHOW MORE in the Premise listing as sometimes Authorizations may be needed but not visible unless you view all the facilities. Data will not share for facilities that still need authorization
- Confirm that your buildings are LINKED for the data sharing services to ESPM. If you submitted a connection request before your ESPM meters were created, you will need to disconnect and reconnect to ensure data sharing
- If this is your initial set up, it can take 2-3 weeks for the initial data sharing to occur depending on the point in the data cycle that your building was created. To jump start the data sharing process, please unshare and reshare your building. (Refer to Section 4 of the Benchmarking Guidance Document)
- Otherwise, please unshare and re-share your building in ESPM to re-trigger the data-sharing event. This resolves most data-sharing issues. However, if the issue persists, please contact benchmarking@pge.com

Q: How long does it take to process the request to connect to data-sharing with PG&E?

A: Requests to link with ESPM for data-sharing scheduling are processed twice daily. You will see if the connection request was successful by viewing your BMP Building profile indicating that the services are LINKED and the ESPM Property ID for the linked property is displayed.

It may take a full business day to process your request to share PG&E data with ESPM. However, if this is your first time linking your ESPM account to PG&E, data may not be posted until our Monthly Historical Data run scheduled for the 16th of every month. If you need data sooner, the recommendation is to wait

until the initial linkage is complete (your BMP Building Profile will reflect LINKED), and then unshare and reshare the building. This will trigger the data-sharing event and try to pull in any historical data available for your facility.

Q: How often does the usage data update in ESPM?

A: Historical usage data is shared with ESPM for your facility on the 16th of every month. Please note, that depending on when you set up your account for sharing, you will not see historical usage until that monthly sharing process occurs.

If you need data sooner, the recommendation is to wait until the initial linkage is complete (your BMP Building Profile will reflect LINKED), and then unshare and reshare the building. This will trigger the data-sharing event and try to pull in any historical data available for your facility.

Q: Data is shared, but there are gaps (missing months) in the data?

A: if there is a gap or missing data, the recommendation is to delete all the records that occur after the data gap, (data gaps are highlighted in ESPM), and to unshare and reshare the building (Refer to Section 4 of the Benchmarking Guidance Document) **NOTE:** Do not delete data in your profile for records older than the full prior year as those records will NOT be updated in a data share event.

Q: Data is sharing, but there is a “0” usage value in the data and I know I had usage?

A: “0” value records, are typically due to an out of synch condition during data-sharing and should resolve with the next data posting. However, if after the next data-cycle the data does not correct, please unshare and reshare the building (Refer to Section 4 of the Benchmarking Guidance Document). If the issue persists, please contact benchmarking@pge.com for assistance.

Q: Why am I getting “Overlapping Meter Entries” error messages?

A: ESPM requires that meter entries do not overlap by more than one day. You may be getting errors for one of the following reasons:

- Before signing up for web-services, you had previously entered usage/billing data manually and the start/end dates did not accurately match the meter read cycle. You will want to correct this by editing the meter start/end dates.
- More typically, the meter had a bill that was rebilled either due to an error or bill estimation. Web services will update the meter with the new bill, but the previous bill will not be removed, and PG&E will not overwrite existing data. To correct this, delete the original or oldest record, and retain the corrected data, typically the more recent record posted to the account.

Q. I would like to get more historical data. Does the Benchmarking Program provide historical data?

A: Whole Building Benchmarking provides data for the 2 prior calendar years in the data-sharing process to support. No additional historical data is available through this program.

Additional Benchmarking Portal Tips/Information:

- If you are new to the Benchmarking program, we recommend that you fully set up one building at a time until you are familiar with the process. This will allow you to see the end-to end process before you proceed defining multiple facilities
- Gather as much information as you can about your facilities in advance to help you through the process.

- When mapping premises for your building, if the services reflect “0” services for gas/electric, but it is part of your building, add it to your mapping. If either meter becomes active it will automatically be included in your data uploads unless authorization is needed.
- If you need to delete a Building in the Benchmarking Portal, please delete/remove the meters before deleting the building to ensure they are available for future mapping.
- We recommend that you check your Benchmarking and ESPM accounts periodically to identify and resolve any data sharing issues that may have occurred.

Help with ESPM

Q: Is there a contact at ESPM that I can reach with questions about the Portfolio Manager tool and how to submit compliance reports?

A: Yes, please view ESPM Help Tools and reference information at ESPM Help Topics. If you need further assistance, you can submit a request via ESPM [ENERGY STAR Portfolio Manager](#)..

To ensure you have the most accurate information regarding your specific reporting compliance requirements, PG&E does not provide support related to the submission of any compliance documentation. For any questions related to your building’s specific compliance requirements, please reach out to the appropriate regulatory agency for your location. Contact information is listed in the Overview section of the Benchmarking User Guide.

AB1103 Program FAQ’s

Q: What is the status of PG&E’s Individual Meter Benchmarking Program AB 1103?

A: PG&E’s Whole Building Benchmarking (AB802) supersedes AB1003. Data sharing will cease to all AB1103 Meters as of 04/30/2023.

Users are encouraged to transition their existing ESPM account profiles and facilities to support data sharing via their profiles in PG&E’s Building Benchmarking Portal to ensure ongoing access to usage information.

Q: How do I convert my existing meters set up under AB 1103 to the Whole Building Benchmarking Program?

A: The Benchmarking Guidance Document, Section 6 provides step-by-step directions on how to convert your existing set up to the new program.

NOTE: To retain existing historical data, **DO NOT DELETE METERS**. Rather, set meters to INACTIVE. This will allow you to retain all prior historical data.