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
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 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.

PG&E Building Benchmarking Portal

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

Assembly Bill 802

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

Benchmarking@energy.ca.gov

Building Energy Benchmarking Program

ENERGY STAR Portfolio Manager

ENERGY STAR Portfolio Manager (ESPM) is an online tool managed by the EPA that allows building owners to measure and track energy usage, as well as greenhouse gas emissions, for their buildings.

ENERGY STAR® Portfolio Manager Website

ENERGY STAR® Portfolio Manager Support

The Process to Benchmark Using the Building Benchmarking Portal

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 ESPM.

If you have previously benchmarked your building in ESPM with PG&E’s individual meter web services connection, this guide will provide instructions for how to adjust your ESPM Property to begin receiving data from the BMP.
Process using the Building Benchmarking Portal
The process to setup your building with the BMP is accomplished in the following order:

1. Building owner, or authorized agent, submits request to benchmark their building.
2. After request is approved by PG&E, building owner searches for and selects the utility meters at their building.
3. If required, building owner receives authorization from utility meter account holders to authorize the release of their energy usage data to ESPM.
4. When BMP setup is complete, building owner creates an ENERGY STAR Portfolio Manager account for their building to share and connect with PG&E.
5. Once all steps above are completed, aggregate energy usage data is uploaded into the building owner’s ENERGY STAR Portfolio Manager Property.

NOTE: Setup must be followed in this order. Additionally, there are steps that require PG&E and ESPM systems to communicate with one another. These steps generally take 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, it is recommended to setup one building at a time first.
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.

If you have questions related to the Building Energy Benchmarking Disclosure Program, please contact the CEC Benchmarking Inbox at benchmarking@energy.ca.gov.
Section 1 | Setup your Building in the Building Benchmarking Portal

This section will instruct you how to setup your building in the Building Benchmarking Portal (BMP)

1.1 Create an Account

1. Go to the Building Benchmarking Portal
2. Click Register and create an online account for the BMP. 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 use these login credentials. You must create a new Username and password.

3. Once you create your BMP account you will be able to add your first Building. Click Add Building.
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.

1. After clicking on Add Building, enter the required information
2. Click Next

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

- Building owners or authorized Agents 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”
- Owners can also submit documents such as a deed or mortgage statement

3. Once the document is ready, click Browse to locate the file on your computer and upload, click Next

4. Review your request, then hit Submit
- 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
• Once approved, Registration status changes to “Approved”, and Mapping status to **Undefined**

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, it is recommended to:

1. Confirm the total number of physical meters at your building
2. Retrieve and review utility bills for the Service Address. This is the address of the meter in the BMP
3. Take note of the PG&E Meter #: either on your bill or on the physical meter
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)
1.3 Define and Map a Building

1. On the Manage Buildings tab, find your building and click on **Undefined**

2. On the next page, click **Go to New Building Definition**

**NOTE:** The next page may display 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 **Add to New Mapping**

**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
- **Do not include** suffixes like “Street”, “St”, “Road”, “RD”, etc.
- **Do not include** the zip code
Sample Search – “215 market san francisco”

3. Hit **Search** and matching results will appear on the next screen

The columns in the search results provide the following information:

<table>
<thead>
<tr>
<th>Premise Address</th>
<th>Premise Status</th>
<th>Gas Services</th>
<th>Electric Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Address of utility meter</td>
<td>Notes if the Premise is “Unmapped” (available) or “Mapped” (unavailable)</td>
<td>1 = active gas meter 0 = no active gas meter</td>
<td>1 = active electric meter 0 = no active electric meter</td>
</tr>
</tbody>
</table>
4. Select the Premise(s) you want to add to your building and click on **Add to New Mapping**. This will add the Premises to your “cart”

![Image of a search results page with a table listing premises and options to add them to a new mapping]

**NOTE:** If your search has more than 50 matches, a **Show More** icon will appear. Click this icon to display up to 50 additional premises. Once the link disappears, all Premises have been displayed.

---

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

To search for additional meters at other addresses, click **Search Premises** and repeat. Once you have added all necessary Premises click **Save New Mapping**.
• 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. If a count is “0”, then there are no active meters for that commodity.

• 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.

• Also notice that a Building ID has been created. You will need this, along with your User ID, for future steps.

NOTE: If a Premise is labeled “Mapped”, it is connected to another building and is unavailable. Premises cannot be mapped to more than one building. If you have questions, contact benchmarking@pge.com.

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

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

NOTE: Section 2 and Section 3 cover the “Auth Required” (if applicable) and “Not Linked” text you see in your Building Detail. These will be addressed during later steps.
If you need to remove a meter, click **Update Mapping**

De-select the meters you want to remove, then hit **Save Updates**

NOTE: If you need to delete a building, PLEASE REMOVE ALL METERS before deleting the building.

After completing building 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 setup 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.
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 jump to the next section.

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

Meters need to be authorized if:

- A non-residential building has less than 3 active utility accounts
- A building with at least one residential utility account has less than 5 active utility accounts

This applies to each commodity (electric and natural gas).

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

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.

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

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

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

- Select the meter(s) you intend to authorize for release by reviewing the Meter # or Service Agreement ID.
- Next, select the Aggregate Building Data (AB 802) radio button.
- Type, do not copy / paste, the BMP Building ID into the Property Owner Selection Field.
- This will generate a pop-up box where you select the building from the BMP.
- If you do not see the pop-up box, re-type the Building ID, or confirm the building is shared correctly in ESPM.
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".
Section 3 | Setup your ENERGY STAR Portfolio Manager Property

After you have completed your BMP building setup, and any required authorizations, its time to setup your ESPM Property.

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. Don’t 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 in 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)

- From the My Portfolio tab, add a property by clicking Add a Property box to get started

- Enter your property’s primary function, number of buildings, and construction status. Then click Get Started
- Enter the property name and full address carefully.

- Finish entering the building data, then click Continue.

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

- Finish adding the details describing your building, then click Add Property to finalize your building profile. The green banner confirms your success.
3.2 Setting up Energy Meters

To receive data from the BMP, **you can only have two 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.

To get started:

1. Click the Energy tab
   - Click Add a Meter
   - Choose Electric or Natural Gas
   - Choose the energy source (e.g. from the grid for electric)
   - Choose the Units (e.g. kWh, or Therms)
   - User can name the Meters whatever works best. However, we recommend adding “Aggregate” in the name
   - Set Date Meter Became Active to January 1 of last year
   - 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 completed, **you should have only two meters**. Sample photo below:

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 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.

- 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
  - Search for PG&E by entering `pge_agg_benchmark` in the Search for New Contacts field
  - 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. After you receive confirmation, now you will share your Property and Meters with PG&E to begin receiving data.

NOTE: If you plan to connect more than one building, you only need to complete this request once as your ESPM Account is now connected with PG&E’s. Connection requests typically take less than 24 hours to process and you will receive 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.

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

• 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
• Retrieve the **Building ID** and **User ID** of your building (screenshot below for reference)
• 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**

REMINDER – Check that only two meters (1 electric and 1 natural gas) are set to **Full Access**. If your building has any other none PG&E meters in ESPM, these should be set to **None**.

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

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

• 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
Section 4 | Un-share / Re-share

Once you have completed the BMP and ESPM setup, your data will upload 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 24. If you skip this step, data will upload in 10 – 15 business days.

4.1 Un-share / re-share your building
To get started

- 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 Continue.

- 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**
• 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

![Image of sharing options](image)

• Finally, click **Apply Selections and Authorize Exchange**

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

![Image of application confirmation](image)

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

If you need support, submit your question along with your Building ID and ESPM Property ID to [benchmarking@pge.com](mailto: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
   
   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, de-select the Premise you wish to remove, then Save Updates

2. Confirm that the Electric and Gas meters have been connected to ESPM
   - If either status is Not Linked, you will need to review your ESPM Setup on Pg. 19 (section 3.4), and also confirm you created only one meter each for electric and natural gas

3. Confirm that no meters require Authorizations
   - If you see an Auth Required, the meter has not been authorized for release
   - Review Pg. 12 for how to authorize meters

If your Building:
   - Has all intended Premises mapped
   - Shows both Gas and Electric as Linked to Portfolio Manager Account
   - 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.

   ![Meter Setup Table]

   - 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. See Pg. 27 for further instructions

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 Permissions Table]

   - 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

   - 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 Pg. 15 to review how to connect with the proper PG&E ESPM Account

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 Property that needs edit
   - Select Pacific Gas and Electric Whole Building (pge_agg_benchmark)
   - Select Personalized Sharing & Exchange Data (“Custom Orders”)
   - Hit Continue
   - Hit “Edit”
   - Update the Permission settings to:

<table>
<thead>
<tr>
<th>Item</th>
<th>None</th>
<th>Read Only Access</th>
<th>Full Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Information</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>All Meter Information</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Energy Meters</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Aggregate Electric</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Aggregate Natural Gas</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Goals, Improvements, &amp; Checklists</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
<tr>
<td>Recognition</td>
<td>☑</td>
<td>☑</td>
<td>☑</td>
</tr>
</tbody>
</table>

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.

   - Hit “No” for Share Forward
   - Hit Apply Selections & Authorize
   - Hit Share Property(ies)
Section 6 | Editing an ENERGY STAR Portfolio Manager Account setup with individual meter sharing (AB 1103)

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.

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
5. Click the **Energy** tab
6. Click on an existing meter that is receiving data from PACIFICGASELECTRIC
7. Click on the **Basic Meter Information** banner
8. Uncheck the **Still in Use** box
9. Mark January 1 of last year for Date Meter Became Inactive, Save Changes.
   a. The Benchmarking Portal will upload data from January 1 of last year – present date of this year
10. Repeat steps for the remaining connected meters

**Step 2** (optional): Remove PACIFICGASELECTRICs access to your Property
   - Click the **Summary** tab
   - Scroll down to the **Sharing this Property** box
   - Click “I want to…” next to the **Pacific Gas and Electric** (PACIFICGASELECTRIC) contact and select “Remove Contact’s Access to Property”

   - Select “Continue” when the confirmation pop-up appears

**PG&E Recommendation**: Do not delete any old meters. Change old meters to “Inactive” and remove access to the Property for PACIFICGASELECTRIC.

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

To get started:
1. Click the Energy tab
   - Click Add a Meter
   - Choose Electric or Natural Gas
   - Choose the energy source (e.g. from the grid for electric)
   - Choose the Units (e.g. kWh, or Therms)
   - User can name the Meters whatever works best. However, we recommend adding “Aggregate” in the name
   - Set Date Meter Became active to January 1 of last year
   - 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. Make sure you click the 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)

```
<table>
<thead>
<tr>
<th>Name</th>
<th>Energy Type</th>
<th>Most Recent Bill Date</th>
<th>In Use? (Inactive Date)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aggregate - Electric Grid</td>
<td>Electric - Grid</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Aggregate - Natural Gas</td>
<td>Natural Gas</td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>
```

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 made changes to 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.

- 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
  - Search for PG&E by entering pge_agg_benchmark in the Search for New Contacts field
• 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, now you will 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’s time to share your ESPM Property with PG&E:

- To start, click the Sharing tab

![Sharing Tab](image)

- 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:

![Share (or Edit Access to) Properties](image)

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

![Select Permissions](image)

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

- Retrieve the Building ID and User ID of your building (screen shot below for reference)

![Building Details](image)

- 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**

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**
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.
Un-share / Re-share

While not required, a recommended final 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. If you skip this step, data will upload in 10 – 14 business days.

Un-share / re-share your building

- 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 Continue.
- 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**
• 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

Finally, click **Apply Selections and Authorize Exchange**.

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

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

If you need support, submit your question along with your Building ID and ESPM Property ID to benchmarking@pge.com
Section 7 | FAQs

General
- What kind of document can I upload in support of my registration request?
  - Ownership documents or a Letter of Authorization in PDF or Word Doc format
- Why is energy usage data not uploading into ESPM?
  - Please review the Checklist above, to confirm your setup. Some reason data does not upload:
    - Meters have not been Authorized for release
    - Property hasn’t been shared with the correct PG&E ESPM Account pge_agg_benchmark
    - Meters were not setup with access as Full
    - You have created and share more than one meter per commodity
      - If any meter has “Read Only” access, this can override other settings and prevent data from uploading
- I’ve completed and confirmed everything, and the data still isn’t updating
  - Please Un-share / Re-share your building (Pg. 21). You’ll need to wait up to 24 hours for the share to be processed. If this does not work, contact benchmarking@pge.com
- Why are no Premises listed after I click Undefined?
  - If no results list, you will need to perform a Premise search. It is recommended to search with the street number, street name (w/out prefix), city
- What should I do if no Premises show up after I type in and search my address?
  - Make sure your search only includes the street number, street name (w/out prefix), city
  - Try variations: e.g. “North First”, “N First”, “N 1st”, etc.
- If I still cannot find a Premise matching my address, what do I do?
  - Review the utility bill for the Service Address; the Service Address will match the address for the Premise in the Portal
- There is a gap in my data, what should I do?
  - If there is a gap or missing data, please re-share the building in ESPM first (Pg. 21)

Authorization
- Why do I authorize the meters after I share with ESPM?
  - You must share your property in ESPM with pge_agg_benchmark before meters can be authorized for release
- Can authorization be waived by using/requesting aggregated data?
  - Authorization requirements cannot be waived

Help with ESPM
- Is there a contact at ESPM that I can reach out to if I run into a sticky situation I cannot resolve?
  - ENERGY STAR no longer has a hotline so we recommend submitting a query using this page. https://portfoliomanager.zendesk.com/hc/en-us/requests/new

Help with the Building Energy Benchmarking Program (AB 802) and CEC Resources
- Visit the CEC’s Building Energy Benchmarking Program Website for helpful information related to AB 802 regulations, and answers to Frequently Asked Questions
  - Program Fact Sheet
  - Frequently Asked Questions
  - Benchmarking Email Hotline: Benchmarking@energy.ca.gov