CITY OF SAN JOSE
CAPITAL OF SILICON VALLEY

Environmental Services

San José Energy and Water Building Performance Ordinance (BPO)

Compliance Instructions
Please submit your annual benchmarking report to the City of San José by **May 1**.
The benchmarking process consists of 6 steps:

☐ Step 1: Create a property profile in ENERGY STAR Portfolio Manager®

☐ Step 2: Gather and input energy use data

☐ Step 3: Gather and input water use data

☐ Step 4: Identify your San José Building ID(s)

☐ Step 5: Confirm your data is complete and accurate

☐ Step 6: Submit electronic benchmarking report to the City of San José

☐ Step 7: Submit annual reporting fee to the City of San José

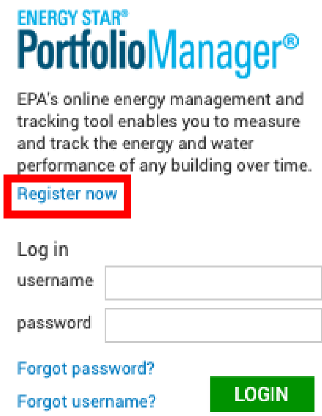
Please allow adequate time for each of these steps. The compliance process may take as little as one sitting, but can often require more time to find property details, enter data, allow for utility data authorizations, etc. If you need to benchmark in multiple sessions, you can save your work in ENERGY STAR Portfolio Manager®.

If you are having issues with the ENERGY STAR Portfolio Manager platform:

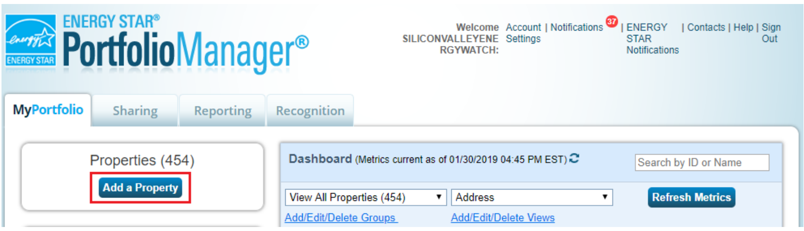
- Ask a Question: you can contact Energy Star's helpdesk by submitting your question; a representative will then reach out to you.
- Search their FAQ for Energy Star related questions.

Step 1: Create a property profile in ENERGY STAR Portfolio Manager®

1) To create an account in ENERGY STAR Portfolio Manager (Portfolio Manager), go to the login page www.energystar.gov/portfoliomanager and click **Register Now.** Return to this webpage to log in to your account in the future.

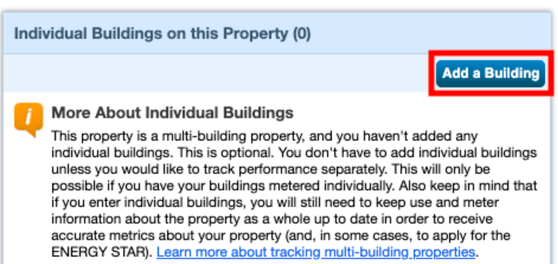


2) Fill out the required information (username, password, email address, job title, organization, etc.) and click **Create My Account.** Please note:
   i. All fields with red asterisks (*) are required;
   ii. Your username cannot be changed once an account has been created;
   iii. Remember to write down the username and password for the account;
   iv. The email address associated with the account can be updated, but should be one that is checked regularly, so that City staff can contact you if there are issues with your submission. If the City is unable to contact you to correct reporting errors, your property may be subject to noncompliance penalties or fines;
   v. You can benchmark and report multiple properties from one account.
3) You will receive an email from Portfolio Manager shortly after creating your account; click on the URL in that email to activate your account.
4) Once you have created and activated your account, you can create a profile for your building by clicking **Add a Property** under the **My Portfolio** tab.

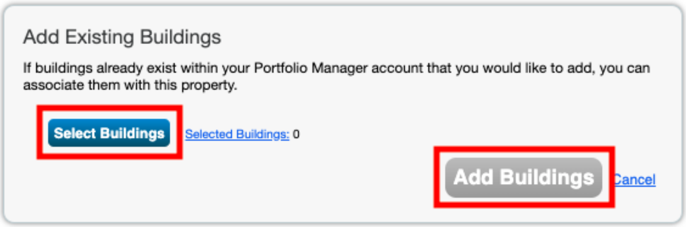


a) For properties with <u>one building</u>, start by entering the required information (property type, number of buildings, construction status). Then click **Get Started.**
   i. Enter the basic property information (property name, address, gross floor area, etc.) and click **Continue**.
   ii. Next, enter the building use information (weekly operating hours, workers on main shift, etc.). For buildings with multiple uses, click **Add Another Type of Use** and enter the corresponding information for this use. When you have added information for all uses in your building, click **Continue**.
   iii. Please note: Default and temporary values for these fields will not be accepted, and if left uncorrected in submitted reports, may result in noncompliance.
   iv. To finalize your entries, click **Add Property**.
   v. Add or edit property details at any time by returning to the property **Details** tab.

b) For properties with <u>more than one</u> building, you will then associate additional buildings ("child properties") to the first building ("parent property") you created. If your property is only comprised of one building, skip to *Step 2: Gather and input energy use data* on page 5.
   i. To create a child property, repeat all steps in #4, starting on the previous page.
   ii. Once you have created the child property(ies), you can associate them with your parent property by clicking on the **My Portfolio** tab, and then clicking on the **Summary** tab.
   iii. Scroll down and click **Add a Building**.



iv. Under **Add Existing Buildings**, click **Select Buildings**.

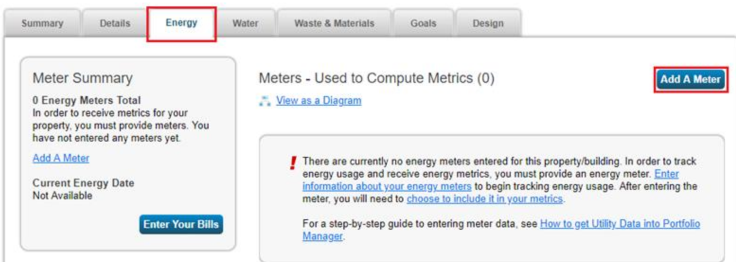


v. A new screen will appear, in which you will select the child property(ies) you'd like to add. Then, click **Apply Selection**.

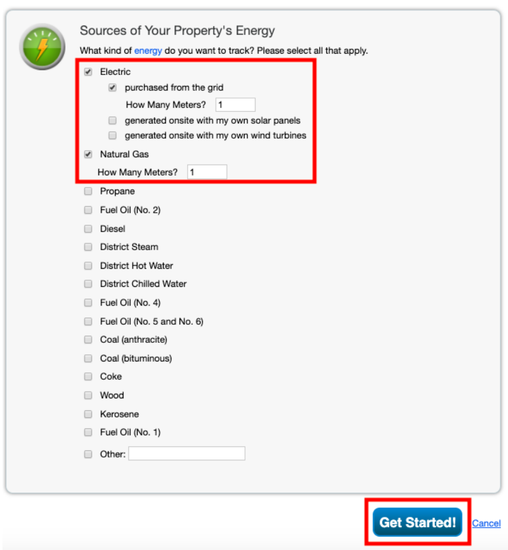
vi. Finally, click **Add Buildings**.

Step 2: Gather and input energy use data

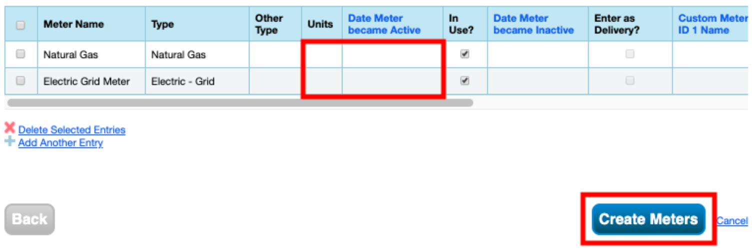
1) To input your energy use data, first you will have to have an accurate count of all energy meters that serve the property. Please note: The BPO requires you to benchmark ALL types of energy consumed on your property (e.g. electricity, gas, etc.) and what is generated on-site (e.g. solar), both in common areas and tenant areas.
2) Once you have this information, you can create your energy meter(s).
3) To add a meter, click on the property's **Energy Tab**, and click **Add A Meter**.



4) Check the boxes for all type(s) of energy you wish to track (e.g. electricity, gas, solar). Click **Get Started**. Please note: Most properties can use PG&E's aggregated whole-building benchmarking services, so will only need to select one meter of each type. Instructions on setting these services up begin below in #6 Option 1.



5) Next, you must specify the Units (e.g. kWh) and Date Meter became Active for each meter. You can do so simply by clicking in the cells and typing the information. Please note: The Date Meter became Active must match the date of the first bill entered. When you are finished, click **Create Meters**.



6) To ensure accurate analysis, there must be at least **12 full consecutive calendar months** of whole building energy use data for all active meters and all fuel types. There are two ways to get this data:

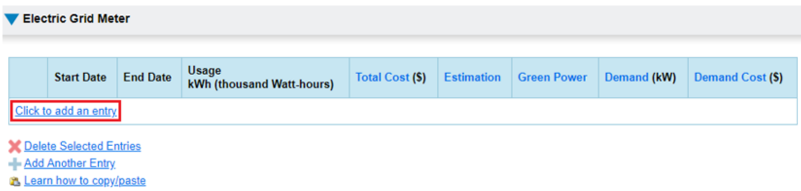
   <u>Option 1: If you do not have your monthly data on hand, you can request whole building energy use data directly from PG&E.</u> Start with this option if you are not the account holder for all the meters in the building; if you have a large number of meters (e.g. an apartment complex or plaza in which tenants are responsible for their own energy bills); or if you do not wish to manually enter your data. With this option, PG&E will import the previous year's data, and continue to upload new data regularly, saving time year after year.

   For detailed instructions, visit pge.com/benchmarking and click **Building Benchmarking Portal - Guidance & Instructions PDF** under the section "**How to request energy usage data from the Building Benchmarking Portal.**"

   <u>Option 2: Compile energy data directly from utility bills and enter it to Portfolio Manager</u>. This option is best for building owners who are also the account holder for all meters in the building, and where there are not multiple energy and gas meters.

   Once you have gathered 12 months of whole building energy use data, upload that data into Portfolio Manager through one of the two following options:

   a. <u>Enter energy use data manually</u>.
      i. Select **Click to Add an entry**.
      ii. Enter the billing **Start Date**, **End Date**, and **Usage** for each billing period. You can do so again by clicking in the cells and typing in your information.



iii. Repeat for all meters and energy sources and click **Continue** to save the information.

b. OR upload all energy use data at once via spreadsheet.

i. Click on the **Spreadsheet Template** hyperlink to download a standard template. Enter data from all bills into the template. Do not reformat the spreadsheet template. Doing so will likely result in an unsuccessful upload of the document.

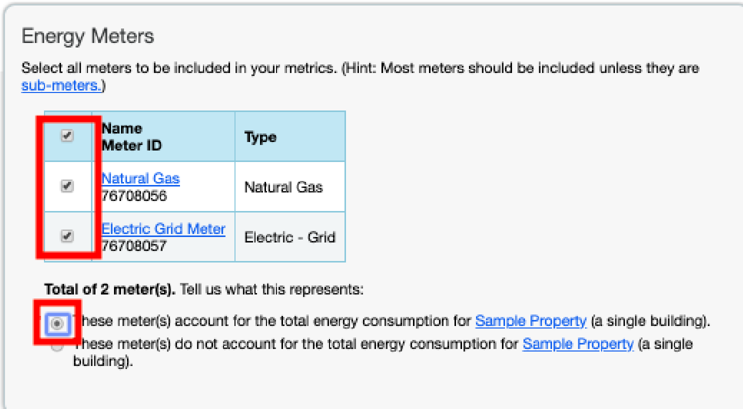
ii. Save the file onto your computer.

iii. Go back to the meter setup page on Portfolio Manager, click **Choose File**, and select the file you just created.

iv. Click **Upload**. Repeat for all meters and energy sources, and click **Continue** to save.

c. For BOTH manual entry options, please note: You must enter all bills for the reporting year. In some cases, this means that you may need to enter additional bills, spanning the end of the previous year, or the beginning of the next (e.g. a billing period from Dec. 20, 2018 – Jan. 20, 2019).

d. Next, select the meters that contribute to the property energy load by checking the boxes next to all meters you created. Then, confirm whether the meter(s) entered account for total or partial energy consumption for your property, then click **Apply Selections**.


Energy Meters
Select all meters to be included in your metrics. (Hint: Most meters should be included unless they are sub-meters.)
Name
Meter ID
Type
Natural Gas
76708056
Natural Gas
Electric Grid Meter
76708057
Electric - Grid
Total of 2 meter(s). Tell us what this represents:
hese meter(s) account for the total energy consumption for Sample Property (a single building).
hese meter(s) do not account for the total energy consumption for Sample Property (a single building).

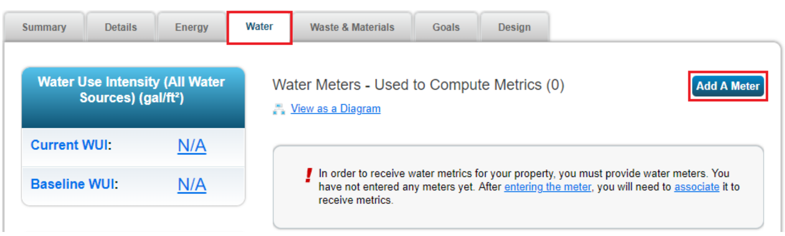
Step 3: Gather and input water data

Unlike energy usage data, water usage data can only be entered manually. If you do not have your water usage data on hand, you may request it by contacting your water provider directly. If you are not the account holder for all water meters serving your building, you will need the account holder to request this data for you.

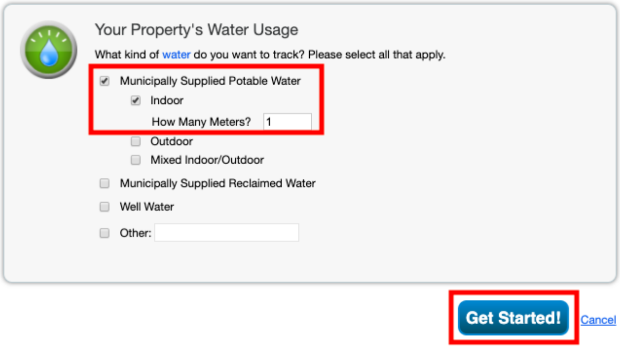
Water Providers

San Jose Water Company	customer.service@sjwater.com 408-279-7900
San Jose Municipal Water	408-535-3500
Great Oaks Water Company	customerservice@greatoakswater.com 408-227-9540

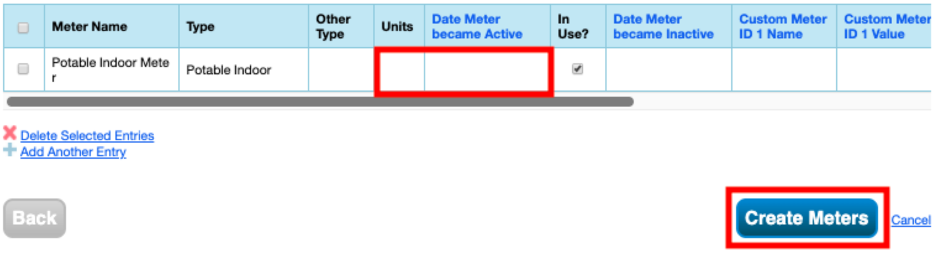
1) To input your water use data, first you will have to have an accurate count of all water meters that serve the property. Please note: The BPO requires you to benchmark ALL water consumed on your property (indoor, landscaping, etc.), both in common areas and tenant areas.
2) Once you have this information, you can add your water meter(s).
3) To add a meter, click on the property's **Water Tab**, and click **Add A Meter**



4) Check the boxes for all of the property's water sources (Municipally Supplied Potable Water, Municipally Supplied Reclaimed Water, Well Water, and/or Other) and the areas they serve (Indoor, Outdoor, Mixed Indoor/Outdoor) and click **Get Started.**



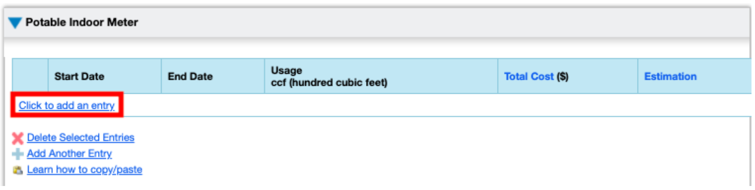
5) Next, you must specify the Units (e.g. ccf) and Date Meter became Active for each meter. You can do so simply by clicking in the cells and typing the information. Please note: The Date Meter became Active must match the date of the first bill entered. When you are finished, click **Create Meters**.



6) To ensure accurate analysis, there must be a full year of whole building water use data for all active meters. To enter this water use data, you can use one of two options:

a) <u>Option 1: Enter water use data manually</u>
   i. Select **Click to Add an entry**.

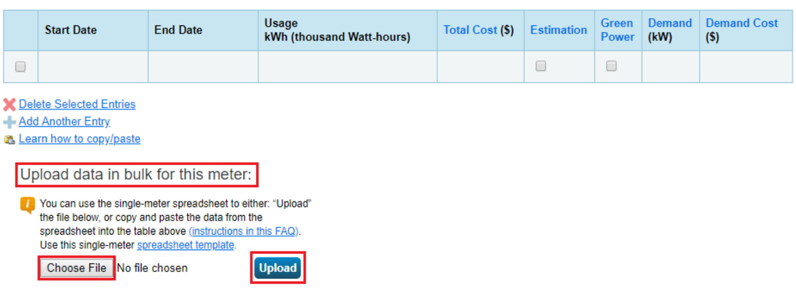
ii. Enter the billing **Start Date**, **End Date**, and **Usage** for each billing period. You can do so again by clicking in the cells and typing in your information.



iii. Repeat for all meters, and click **Continue** to save the information.

b) <u>Option 2: Upload all water use data at once via spreadsheet.</u>

i. Click on the **Spreadsheet Template** hyperlink to download a standard template. Enter data from all bills into the template. Do not reformat the spreadsheet template. Doing so will likely result in an unsuccessful upload of the document.



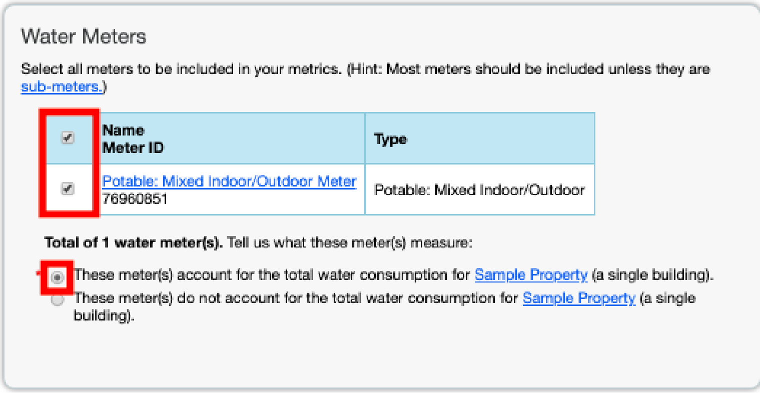
ii. Save the file onto your computer.

iii. Go back to the meter setup page on Portfolio Manager, click **Choose File**, and select the file you just created.

iv. Click **Upload**. Repeat for all meters and click **Continue** to save.

c) For BOTH options, please note: You must enter all bills for the reporting year. In some cases, this means that you may need to enter additional bills, spanning the end of the previous year, or the beginning of the next (e.g. a billing period from Dec. 20, 2018 – Jan. 20, 2019).

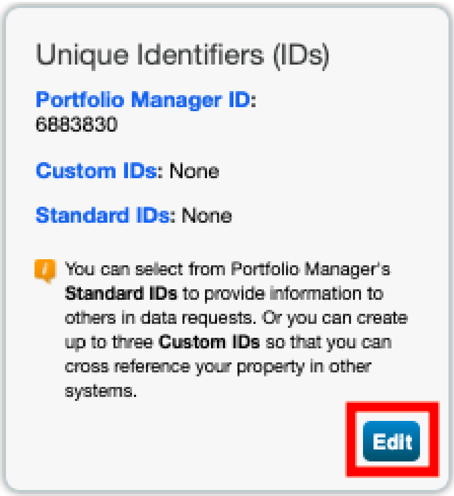
d) Next, select the meters that contribute to the property water load by checking the boxes next to all meters you created. Then, confirm whether the meter(s) entered account for total or partial water consumption for your property, then click **Apply Selections.**



Step 4: Identify your San José Building ID Number(s)

Each building has been assigned a San José Building ID, which you will use for reporting. This will allow the City to keep track of your building's compliance over time. To find your ID, download the PDF from the program website. You can search by building address or tax assessor parcel number. Please note: Different addresses may be associated with one building (e.g. a building in which tenants all have their own addresses, or a building on a corner lot at two cross-streets), you may need to search all potential addresses to find your building.

1) To add your Unique Building Identification (UBID) to your building profile, go to the **Details** tab for your building and click **Edit** in the **Unique Identifiers** box on the left-hand side.

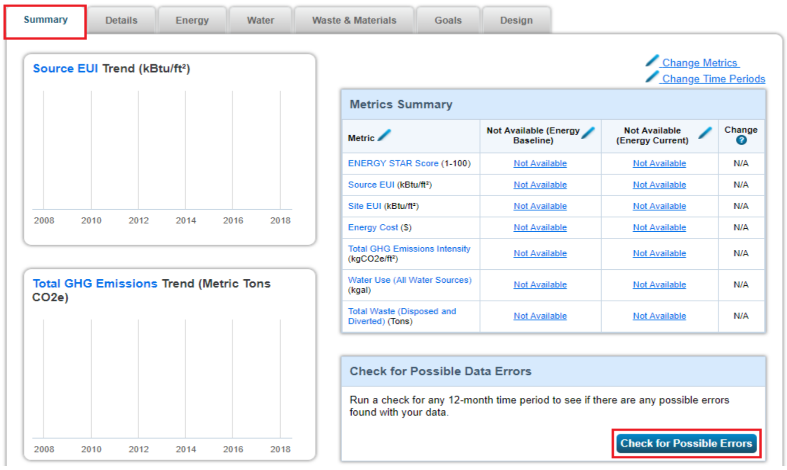


2) In the next **Property Identifiers** page, select San Jose Building ID from the **Standard IDs dropdown**, and enter your unique San José Building ID into the following field. Enter the ID exactly as it is shown on the Covered Buildings List, including all zeros and dashes. Click **Save**.

Step 5: Confirm your data is complete and accurate

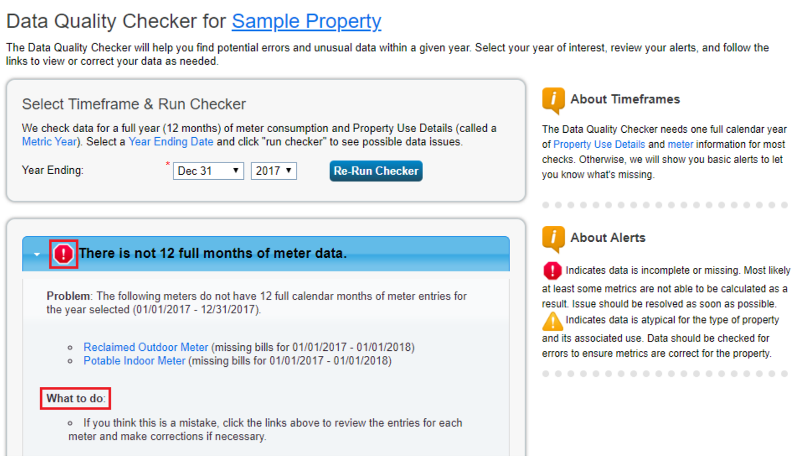
Building owners are required to submit accurate and complete benchmark reports to be in compliance. Benchmarks submitted with errors may inaccurately represent your buildings energy and water use and will not be approved.

1) To check for possible data errors, click on the properties **Summary** tab and select **Check for Possible Errors**.



2) Select the previous calendar year ending in December 31 and click **Run Checker**.
3) If there is an error, an alert icon will appear in the field that contains the error.

4) Review the list of alerts (if any) and follow Portfolio Manager's suggestions to address the issue(s).

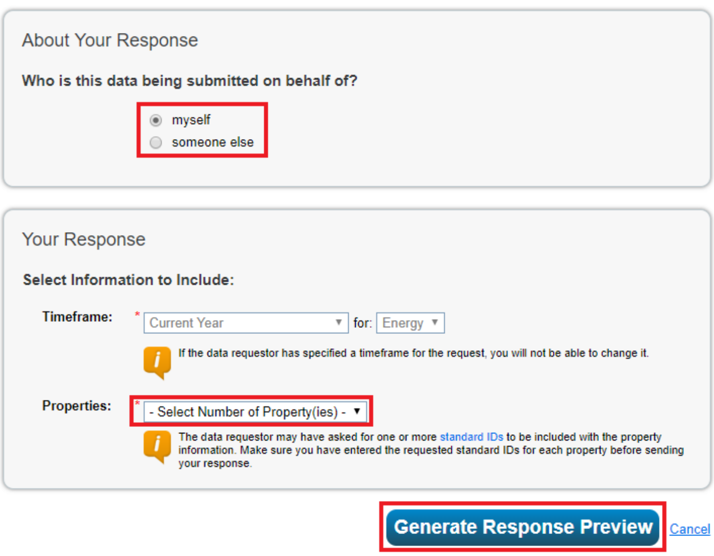


a) Check **Property Uses** and **Use Details** fields to verify that the information entered is correct, and that there are no default or temporary values.
b) Once you have made all necessary changes, run the data checker again to ensure that all alerts have been addressed.

If there is any additional property information you wish to be made publicly available—for instance, to provide context for extremely high Energy Use Intensity—please enter the information into the **Property Notes** section on the **Details** tab.

Step 6: Send Electronic Benchmarking Report to the City of San José

1) An annual Energy Benchmarking Report is required by the City of San José every year. To generate your annual benchmarking report, you need to click on or copy and paste the San José reporting link, which is located on our webpage under Step 5 of section **READY TO COMPLY? START HERE**, into your browser to submit your benchmarking data to the City.
   a) ***IMPORTANT!*** This link will not work until after you have entered all required data, for the entirety of the previous calendar year, into your ENERGY STAR Portfolio Manager® account.
2) You will be brought to an ENERGY STAR Portfolio Manager® page and one of the following will happen:
   a) If you are already logged into ENERGY STAR Portfolio Manager®: you will be brought to a page that says **Respond to Data Request: San Jose BPO Template**.
   b) If you are *not* already logged into ENERGY STAR Portfolio Manager®: you will be asked to log in. Once you log in, you will be brought to a page that says **Respond to Data Request: San Jose BPO Template.**
3) In the following window, fill in the **About Your Response** section, indicating that you are submitting on behalf of yourself or someone else.
4) In the **Your Response** box, select the properties you wish to report.
5) Click **Generate Response Preview**.



6) Send your report to the City of San José by clicking the drop-down menu for your report and select **Send Response**.

Commented [GH1]: Insert link: www.sanjoseca.gov/benchmarking

7) On the following page, enter your login credentials, and click **E-Sign Response**. This will refresh the page.
8) Once the page refreshes and your credentials have been accepted, click **Send Data**, and then **Continue**.
9) Confirmation: The email registered to your ENERGY STAR Portfolio Manager® account will receive a confirmation email from donotreply@energystar.gov, with subject **Receipt for Data Request Submittal**, once your data has been successfully submitted to the City of San José.
10) You will receive a confirmation email from the City of San José once your benchmarking report has been reviewed.

Step 7: Submit Annual Reporting Fee to the City of San José

1) Invoices are mailed out to all covered building list owners annually in early April. You will receive an invoice that contains a 7-digit dash-free **Invoice Number** listed in the top right corner (*highlighted in red box of example invoice below; actual invoices are not highlighted*). **Your Invoice Number is required to process your payment. Note that it is unique to each invoice, and is a different number than your San Jose Building ID**.

City of San José
200 E Santa Clara St, 13th Floor
San Jose, CA 95113

Debtor Number: ######
Invoice Number: ######
Invoice Date: MM/DD/YYYY

Owner Name
Mailing Address
City, State, Zip

TERM NET- PAYMENT BECOMES DELINQUENT 30 DAYS AFTER INVOICE DATE UNLESS OTHERWISE NOTED. FAILURE TO PAY THE TOTAL AMOUNT DUE BY THE DUE DATE CAN BE SUBJECT TO PENALTIES, INTEREST, AND FEES.

ENERGY AND WATER BUILDING PERFORMANCE ORDINANCE (BPO)

PROPERTY ADDRESS:
SAN JOSE BUILDING ID: #### - # - ##

PROGRAM REQUIRMENTS DUE BY MAY 1, 2020:
- BENCHMARKING REPORT, SUBMITTED THROUGH ENERGY STAR PORTFOLIO MANAGER, INCLUDING ALL BUILDING ELECTRICITY, GAS AND WATER USAGE FROM CALENDAR YEAR 2019 (THE OPEN REPORTING PERIOD IS FROM MARCH 1 TO MAY 1, 2020)
- $150 BENCHMARKING REPORT SUBMISSION FEE

Account: Environmental Services
001420763007086 BPO ANNUAL FEES $150.00
Balance: $150.00

Sample Invoice Only

Questions regarding the bill call: Environmental Services 408-975-2540, www.sanjoseca.gov/benchmarking
Questions regarding payment call: Revenue Management (408) 535-7055

Please return this portion with your payment in the enclosed envelope

CITY OF SAN JOSE
CAPITAL OF SILICON VALLEY

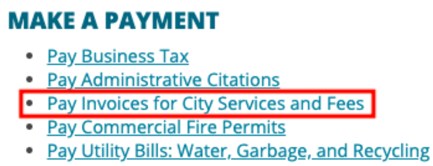
Payment Options:
Pay online: Go to www.csjfinance.org and select the appropriate link under the **Make A Payment** section.
By Mail: 200 E Santa Clara St., 13th Floor, San Jose, CA 95113 Make check payable to: *City of San Jose*
In Person: City Hall 200 E. Santa Clara Street, Tower, 1st Floor. Cashier's Window
By Phone: 408-535-7055 Credit or Debit Cards accepted

Debtor Number: ######

Owner Name
Mailing Address
City, State, Zip

Invoice No.	Citation No.	Amount Due	Amount Enclosed
######	######	$150.00	

2) To pay your annual reporting fee online, please visit http://www.csjfinance.org
   a) Under the **Make a Payment** section, click **Pay Invoices for City Services and Fees**



   b) Enter your invoice number, found on the top right corner of the invoice sent by mail, into the appropriate fields, and click **Pay Now**.

   c) If you did not receive an invoice, or need to request an updated invoice, please contact the BPO Help Desk and one can be re-issued.
3) To pay by mail, make checks payable to the City of San José, and send to 200 E Santa Clara St., 13th Floor, San Jose, CA 95113. Please list your invoice or citation number on the check.
4) To pay over the phone, call 408-535-7055. Credit and Debit Cards are accepted. Please have your invoice or citation number ready.

Note: City Hall is currently closed due to COVID-19; in-person payment is not available at this time.

If you have questions about the BPO or your specific building, please contact us; we're here to help.

- Visit www.sanjoseca.gov/benchmarking
- Email: benchmarking@sanjoseca.gov
- Phone: (408) 975-2540

Thank you for complying with the San José Energy and Water Building Performance Ordinance!