

### 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 7 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<sup>®</sup>.

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

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

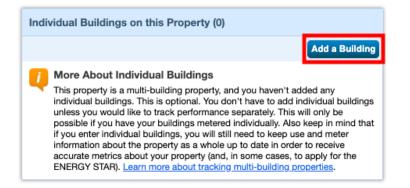
### Step 1: Create a property profile in ENERGY STAR Portfolio Manager®

- 1) Please Note: If you have already created an account and updated your property(s) details, skip to *Step 2: Gather and input energy use data*.
- 2) To create an account in ENERGY STAR Portfolio Manager (Portfolio Manager), go to the create an account page <u>https://portfoliomanager.energystar.gov/pm/signup</u>.
- 3) 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.
- 4) You will receive an email from Portfolio Manager shortly after creating your account; click on the URL in that email to activate your account.
- 5) 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.

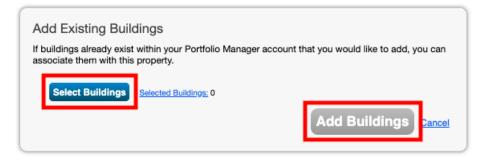
ENERGY STAR	rgy star® <b>ortfolio</b>	Manag	<b>er</b> ®		Welcome ALLEYENE GYWATCH:	Account   Notification Settings	ST	IERGY   ( AR tifications	Contacts   H	lelp   Sign Out
MyPortfolio	Sharing	Reporting	Recognition							
	Properties (45	<b>1</b>	Dashboard	(Metrics current as of	01/30/2019 0	4:45 PM EST) 🛢	[	Search by I	D or Name	e
	Add a Property		View All Prop Add/Edit/Delet	. ,	Address Add/Edit/De	elete Views	۲	Refresh	Metrics	

- 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**.
  - 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.
  - Please note: Default and temporary values for these fields will <u>not be</u> <u>accepted</u>, 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*.
  - 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**.



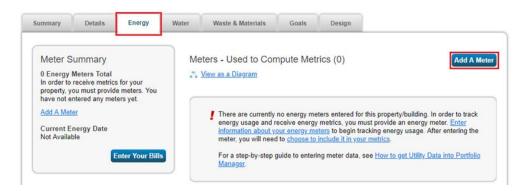
iv. Under Add Existing Buildings, click Select Buildings.



- 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

- 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 wholebuilding 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.

<b>9</b>	Sources of Your Property's Energy What kind of energy do you want to track? Please select all that apply.
	Electric   Purchased from the grid  How Many Meters?  generated onsite with my own solar panels  generated onsite with my own wind turbines  Natural Gas
	How Many Meters? 1
	Propane
	Euel Oil (No. 2)
	Diesel
	District Steam
	District Hot Water
	Fuel Oil (No. 4)
	<ul> <li>Fuel Oil (No. 5 and No. 6)</li> </ul>
	Coal (anthracite)
	Coal (bituminous)
	Coke
	Wood
	E Kerosene
	Evel Oil (No. 1)
	Other:
	Get Started!

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**.

	Meter Name	Туре	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Meter ID 1 Name
	Natural Gas	Natural Gas							
	Electric Grid Meter	Electric - Grid							
	ete Selected Entries I Another Entry								
Bac	:k						[	Create Me	ters Cancel

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:

**Option 1:** If you do not have your monthly data on hand, you can request whole building energy use data directly from PG&E. 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 <u>pge.com/benchmarking</u> and click **Building Benchmarking Portal - Guidance & Instructions PDF** under the section "**How to request energy usage data from the Building Benchmarking Portal.**"

How to request energy usage data from the Building Benchmarking Portal

To obtain aggregated whole-building data, create an account and register a building on our Building Benchmarking Portal.

For instructions on how to use the Building Benchmarking portal, please review Building Benchmarking Portal - Guidance & Instructions IPDF, 2.2 MB).

If additional assistance is required, please contact the benchmarking team at benchmarking@pge.com.

**Option 2:** Compile energy data directly from utility bills and enter it to Portfolio <u>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. Enter energy use data manually.
  - 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.

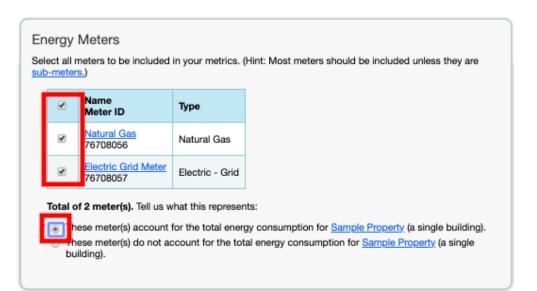
<b>T</b> Elec	tric Grid Me	ter							
_									
	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	
Click t	o add an entry								
Add	te Selected Er Another Entry n how to copy								

- 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.

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
+ Add	You can use the sing the file below, or copy spreadsheet into the	te ulk for this met le-meter spreadsheet h y and paste the data fr table above ( <u>instruction</u> s <u>preadsheet template</u>	to either: "Upload" om the ns in this FAQ).					

- 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, 2021 Jan. 20, 2022).

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**.



#### 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	<u>customerservice@greatoakswater.com</u> 408-227-9540

- 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.

Summary Details	Energy	Water Waste & Materials Goals Design	
Water Use Intens Sources) (		Water Meters - Used to Compute Metrics (0)	Add A Meter
Current WUI:	<u>N/A</u>		
Baseline WUI:	<u>N/A</u>	In order to receive water metrics for your property, you must provide water metrics have not entered any meters yet. After <u>entering the meter</u> , you will need to <u>assistence</u> metrics.	

4) Check the boxes for all 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.** 

<ul> <li>Municipally Supplied Potable Water</li> <li>Indoor</li> </ul>
How Many Meters? 1
Outdoor     Mixed Indoor/Outdoor
Municipally Supplied Reclaimed Water
Well Water
Other:

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**.

	Meter Name	Туре	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Custom Meter ID 1 Name	Custom Meter ID 1 Value
	Potable Indoor Mete r	Potable Indoor				V			
	ete Selected Entries I Another Entry								
Bac	k							Create Me	ters <u>Cancel</u>

- 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) Option 1: Enter water use data manually
    - i. Select Click to Add an entry.

Potable Indoor Met	er			
Start Date	End Date	Usage ccf (hundred cubic feet)	Total Cost (\$)	Estimation
Click to add an entry				
Celete Selected Entrie	<u>95</u>			
Add Another Entry Learn how to copy/pa				

- 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) Option 2: Upload all water 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.

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
+ Add Lea Up	You can use the single-r the file below, or copy ar		er: "Upload" e					

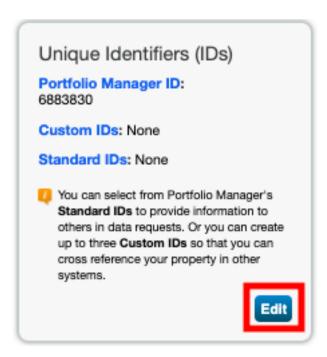
- ii. Save the file onto your computer.
- iii. Go back to the meter setup page on Portfolio Manager, click **Choose File**, and select the file you just created.
- iv. Click **Upload**. Repeat for all meters and click **Continue** to save.
- c) For **BOTH** options, please note: You must enter all bills 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, 2021 Jan. 20, 2022).
- 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.

•	Name Meter ID	Туре	
•	Potable: Mixed Indoor/Outdoor Meter 76960851	Potable: Mixed Indoor/Outdoor	
Th	of 1 water meter(s). Tell us what these m ese meter(s) account for the total water o ese meter(s) do not account for the total	consumption for Sample Property (	

## 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, please visit the <u>program website</u>, where you will find our Covered Buildings List and a Building Lookup Tool. 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

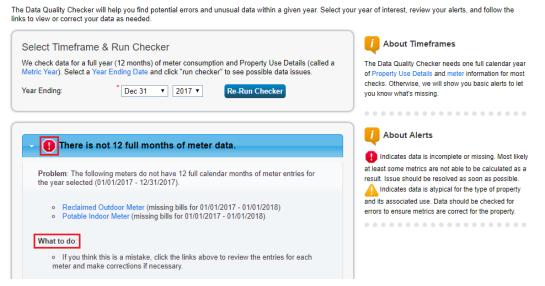
Building owners are required to submit accurate and complete benchmark reports to be in compliance. Benchmarks submitted with errors may inaccurately represent your buildings energy and water use and will not be approved.

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

Source EUI Trend (kBtu/ft²)				Change Me Change Tin				
	Metrics	Metrics Summary						
	Metric 🖊		Not Available (Energy Baseline)	Not Available /	Change 7			
	ENERGY S	TAR Score (1-100)	Not Available	Not Available	N/A			
	Source EUI	(kBtu/ft²)	Not Available	Not Available	N/A			
	Site EUI (kE	tu/ft²)	Not Available	Not Available	N/A			
2008 2010 2012 2014 2016 2018	2018 Energy Cos	(S)	Not Available	Not Available	N/A			
	Total GHG I (kgCO2e/ft <sup>2</sup>	missions Intensity	Not Available	Not Available	N/A			
Total GHG Emissions Trend (Metric Tor CO2e)	NS Water Use ( (kgal)	All Water Sources)	Not Available	Not Available	N/A			
	Total Waste Diverted) (T	(Disposed and ons)	Not Available	Not Available	N/A			
	Run a che	or Possible Da teck for any 12-mo i your data.	nta Errors nth time period to see if th	ere are any possible erro	ors			

- 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.

#### Data Quality Checker for Sample Property



- 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.

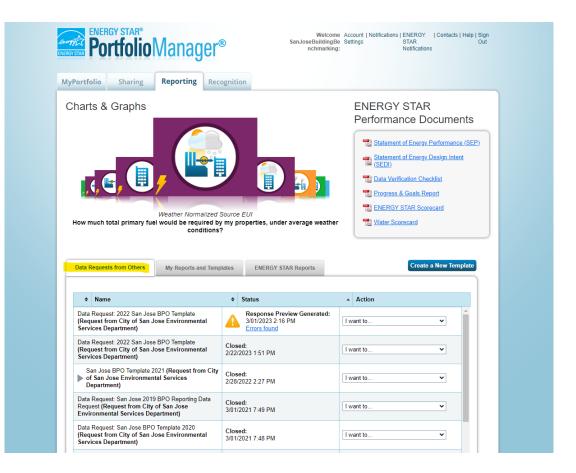
If there is any additional property information you wish to be made publicly available—for instance, to provide context for extremely high Energy Use Intensity—please enter the information into the **Property Notes** section on the **Details** tab.

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

- 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 <u>webpage</u> 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<sup>®</sup> account.
- 2) You will be brought to an ENERGY STAR Portfolio Manager<sup>®</sup> page and one of the following will happen:
  - a) If you are already logged into ENERGY STAR Portfolio Manager<sup>®</sup>: 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<sup>®</sup>: 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 window, fill in the **About Your Response** section, indicating that you are submitting on behalf of yourself or someone else.
- 4) Please Note: The Timeframe section is locked on the year prior to the reporting year. This is because you are reporting the previous year's data. (e.g., if you are filing the 2023 benchmarking report, your timeframe will be locked onto 2022)
- 5) In the Your Response box, select the properties you wish to report.
- 6) Click Generate Response Preview.

About Your F	Response
Who is this da	ta being submitted on behalf of?
	<ul> <li>myself</li> <li>someone else</li> </ul>
Your Respor	ise
Timeframe:	* Current Year • for: Energy •
	If the data requestor has specified a timeframe for the request, you will not be able to change it.
Properties:	<ul> <li>Select Number of Property(ies) - </li> <li>The data requestor may have asked for one or more standard IDs to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response.</li> </ul>
	Generate Response Preview Gance

7) You will be brought to your Energy Star account's **Reporting tab**. Towards the bottom of this page you will want to select the tab **Data Requests from Others**.



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

\$	Name	¢	Status	•	Action	
Data Request: 2022 San Jose BPO Template (Request from City of San Jose Environmental Services Department)		Response Preview Generated: 3/01/2023 2:16 PM Errors found		I want to 🗸		
Data Request: 2022 San Jose BPO Template (Request from City of San Jose Environmental Services Department)		Clos 2/22	ed: /2023 1:51 PM	Edit Properties and Timeframe Preview Response Download Preview in Excel Generate an Updated Response		
San Jose BPO Template 2021 (Request from City of San Jose Environmental Services Department)		Closed: 2/28/2022 2:27 PM		Send Response Delete Response		

- 9) On the following page, enter your login credentials, and click **E-Sign Response**. This will refresh the page.
- 10) Once the page refreshes and your credentials have been accepted, click **Send Data**, and then **Continue**.

- 11) Confirmation: The email registered to your ENERGY STAR Portfolio Manager<sup>®</sup> account will receive a confirmation email from <u>donotreply@energystar.gov</u>, with subject **Receipt for Data Request Submittal**, once your data has been successfully submitted to the City of San José.
- 12) 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

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.



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

#### **MAKE A PAYMENT**

- <u>Pay Business Tax</u>
- <u>Pay Administrative Citations</u>
- Pay Invoices for City Services and Fees
- Pay Commercial Fire Permits
- Pay Utility Bills: Water, Garbage, and Recycling
- 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**.

nvoice/Citation #		
onfirm Invoice/Citation #		
		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) <u>To pay by mail</u>, 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) <u>To pay over the phone</u>, call 408-535-7055. Credit and Debit Cards are accepted. Please have your invoice or citation number ready.

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

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

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