STEP-BY-STEP GUIDE TO BENCHMARKING
Instructions for New ENERGY STAR® Portfolio Manager Users
1. OVERVIEW

ENERGY STAR Portfolio Manager, an online service created by the Environmental Protection Agency (EPA), allows you to track your building’s energy performance and compare it to similar buildings nationwide. To make benchmarking easier and more convenient, SoCalGas offers an Automated Benchmarking Service (ABS), which will automatically upload your building’s energy use directly to Portfolio Manager so you don’t have to manually enter the data from your monthly bills.

SoCalGas encourages customers to obtain benchmark scores for their facilities. A benchmark score tells you how energy-efficient your facility is, compared to similar facilities nationwide.

This guide shows you the step-by-step process for obtaining a benchmark score.
2. GATHER DATA FOR BENCHMARKING
2.1 Fill out the optional ENERGY STAR Portfolio Manager Data Collection Worksheet by entering in the information for all of the space types within your building. Worksheets are available at energystar.gov/ia/business/downloads/PM_Data_Collection_Worksheet.doc. (Learn more about space types at http://www.energystar.gov/index.cfm?c=eligibility.bus_portfoliomanager_space_types.)

2.2 Record all 10-digit SoCalGas account numbers associated with the building. Your account number is located on your SoCalGas bill.

2.3 Record an eight-digit meter number associated with one of your SoCalGas account numbers. Your meter number is also located on your bill.

2.4 Record the five-digit ZIP code of the building you are benchmarking.

You now have all of the information you need to benchmark your building. Proceed to Step 3.

3. REGISTER A PORTFOLIO MANAGER ACCOUNT
3.1 Go to the Portfolio Manager Login Page at https://www.energystar.gov/istar/pmpam/ and click on “Register”:

3.2 Fill out the required information. (Required information is marked with a red asterisk.)

4. CREATE A FACILITY PROFILE
To benchmark your facility in Portfolio Manager, you will need to create a profile that has basic information about the facility and how it is used.

For steps 4.1 through 4.11, you will enter basic information about your building and how it is used. For help, refer to your Data Collection Worksheet.

4.1 Add a facility by clicking on “Add a Property” in the “My Portfolio” page:

4.2 Select the property type that best describes your building and click “Continue”:
4.3 Enter the required information about the property and click “Save”. (Note: It is important that the city name is spelled correctly.)

ADD SPACE TYPES TO YOUR BUILDING

4.5 Portfolio Manager uses different “space types” to categorize a building for benchmarking. To understand which space type(s) to enter for your building, refer to the following ENERGY STAR webpages:

**Space Type Definitions**
energystar.gov/index.cfm?c=eligibility.bus_portfoliomanager_space_types#

**Criteria for Rating Building Energy Performance**
energystar.gov/index.cfm?c=eligibility.bus_portfoliomanager_eligibility.

To obtain the most accurate information, you will need to create separate spaces for facility areas such as outdoor or garage parking, data centers and swimming pools.

Add a space by clicking on “Add Space” in the Space Use section of the “Facility Summary” page. To return to the “Facility Summary” page after viewing the “My Portfolio” page, click on the appropriate property name link in the “Facility Name” column:

4.4 Congratulations! You have successfully created a Facility Profile. You can now view your building on the “My Portfolio” page. The next steps describe how to enter information about your building space and energy use so you can get a benchmark score.
4.6 In the “Add a Facility Space” screen, enter the required information. You can keep the effective date Portfolio Manager provided for you. (If this date is incorrect—for instance, if the space was part of a later addition to the building—you can replace it with the true date.) Select “Continue”.

4.7 In the next screen, refer to your Data Collection Worksheet and input the “Gross Floor Area” for the space you just entered. If you have not yet gathered the information for the worksheet, you can check the boxes in the “Use Default Value” column to substitute temporary values provided by Portfolio Manager. For this screen, Gross Floor Area is the only required attribute; however, entering the other building-specific information requested will give you a more accurate benchmark score.

4.8 If your building has more than one space type, create additional space types by repeating Steps 4.5 through 4.7.

Congratulations! You have successfully entered your building’s space types. You are now at the last stage of benchmarking, which is to enter your building’s energy data. SoCalGas can help you with this step by automatically uploading up to 36 months of energy data directly into Portfolio Manager for you.

ADD METERS TO YOUR BUILDING

4.9 From the “Facility Summary” page click on “Add Meter” in the Energy Meters section.

4.10 Enter your 10-digit SoCalGas account number (see below bill sample) in the “Meter Name” field. The “Meter Name” is actually your SoCalGas 10-digit Account Number. Select therms for natural gas. (Note: It is not necessary at this point to select SoCalGas as an Energy Service Provider and give your meter ID here.) If the “Meter Name” (aka “Account Number”) captures all energy usage for the entire facility, select “Entire Facility.” Under “Select the Meter Type” for “Energy Type,” select “Natural Gas” and for “Units,” select “Therms.” Click “Save.”
4.11 Choose between manual and automatic billing data entry

You now have a choice between manual and automated entry of the energy use for your building(s). If you want to enter the data manually, fill in the requested information in the “Add Meter Entries” screen. Begin with your first meter by entering the number of months of usage data you would like to enter manually, as well as the “Start Date” of the first metering period. Click “Continue.” If you do not want to manually enter energy usage data and instead wish to authorize SoCalGas to automatically upload your billing data to Portfolio Manager, click “Do Not add meter entries.” Skip to section 4.12a.

4.12 If you have multiple SoCalGas account numbers for your building, simply repeat steps 4.10 and 4.11 until all SoCalGas account numbers have been entered in the “Meter Name” field.

4.12a If you want SoCalGas to upload your energy usage data automatically, you can enroll in SoCalGas’ Automated Benchmarking Service (ABS). This service uploads your previous 36 months of energy usage data within one business day. Then ABS will continue to update your account every month to include the most recent 36 months of usage data. This will help you receive the most accurate benchmarking score.

If you plan to use ABS, select “Do Not Add Meter Entries.”
Clicking “Do Not Add Meter Entries” will bring you back to the “Facility Summary” screen. Click on the “My Portfolio” link at the top left side of the page.

5.2 Select Southern California Gas Company from the dropdown list under “Option 1: Select your Current Provider” and click “Add.”

5.3 Read the Terms of Use and check the box “I agree to my provider’s Terms of Use” and click “Continue.”

5.4 Select the appropriate “Level of Access” for your Energy Service Provider (ESP). The most appropriate response is almost always the second of the two choices:

1. “Add new buildings in My Portfolio” allows the ESP to only add new buildings to your Portfolio Manager account.
2 “Add new buildings and update existing buildings in My Portfolio” allows the ESP to add new buildings and edit the existing buildings in your account.

5.5a Select the facilities/campuses for which you wish to authorize data release. Check the box next to each facility and then click “UPDATE LIST.”

5.5b The screen will refresh with the selected facilities listed. Select “CONTINUE.”

5.5c Select the buildings and meters that you want to authorize. Check the box next to each facility and for each meter select the “Read/Write” radio button. **You will not receive data from SoCalGas unless “Read/Write” access has been selected.** Select “CONTINUE” when you have done this for all facilities and meters.

5.5d For the “Information Required by Your ESP” screen, refer to your Data Collection Worksheet and enter an exact **10-digit SoCalGas account number**, an **8-digit meter number** associated with the account number (listed on your SoCalGas bill) and the building’s **5 digit ZIP code**.
You should now be back to the main ABS Console screen.

Congratulations! You have successfully completed all of the data requirements for benchmarking. Your energy use history will be uploaded within one business day. After that, you can log back into your Portfolio Manager account to generate a Statement of Energy Performance, which includes your current benchmark rating.

To receive your Statement of Energy Performance, go to the Facility Summary screen and click on “Generate a Statement of Energy Performance”.

**ENERGY STAR PORTFOLIO MANAGER DATA COLLECTION WORKSHEET**

The EPA has designed some data collection worksheets to help building owners and managers collect data to benchmark buildings using the EPA ENERGY STAR’s Portfolio Manager. The information in the worksheet can be used to establish your building’s profile in Portfolio Manager. Using these worksheets in advance to gather the building information you will need to enter into Portfolio Manager will speed up the data entry process for you. Please refer to the following ENERGY STAR EPA website to access the data collection worksheets: energystar.gov/ia/business/downloads/PM_Data_Collection_Worksheet.doc.

**DATA COLLECTION SHEET FOR SOCALGAS’ AUTOMATED BENCHMARKING SERVICE**

Below is information you can collect in advance which will make it easier for you to access the data needed to complete the benchmarking process:

1. List all of the 10-digit SoCalGas Account Numbers associated with the building you wish to benchmark.
2. List one 8-digit Meter Number associated with one of the above-listed SoCalGas Account Numbers (refer to your SoCalGas bill).
3. Write down the building’s 5-digit ZIP code.

**TROUBLESHOOTING SOCALGAS’ AUTOMATED BENCHMARKING SERVICE (ABS)**

**Issue #1:**
I manage multiple buildings in Portfolio Manager – some on behalf of other people. Many of my buildings have their energy use history, but some still haven’t successfully initiated ABS.

**Solution #1:**
The Portfolio Manager user who initially enrolls a building and its meters in ABS is not able to transfer his authorization to users who “Share” his building. The original user who initially attempted enrollment in ABS should complete Steps 1-3 in Solution #2 on the next page.
**Issue #2:**
I enrolled my building in SoCalGas' Automated Benchmarking Service and it’s been more than one business day. However, my energy data still hasn’t been uploaded to Portfolio Manager.

**Solution #2:**
The steps below address the most common reasons why ABS failed to upload energy data. After completing these steps, you should see your energy use history uploaded within one business day.

1. Make sure the “Meter Name” in the Energy Meters box (on the Facility Summary Page) is an active 10-digit SoCalGas account number. (Do not exceed 10 digits or use any letters or special characters.)

2. Make sure the “Meter Number” listed in the “Information required by your Energy Service Provider (ESP)” section is an accurate 8-digit meter number associated with the account number listed in #1 above.

3. Make sure the “ZIP code” listed in the “Information required by your Energy Service Provider (ESP)” section is the ZIP code associated with the account number and meter number listed for #1 and #2 above.

If energy data is still not uploaded within one business day, you may be requesting data for a “closed” account. SoCalGas is unable to provide energy use history for closed accounts at this time.

If you continue to have issues with uploading billing data via SoCalGas' ABS system, please contact our help desk at: benchmarking@semprautilities.com.

**Issue #3:**
SoCalGas’ ABS uploaded my energy use history, but I still haven’t received my benchmark score from Portfolio Manager.

**Solution #3:**
There are many reasons why your facility may not have a rating. The best way to find out is to click on the link that says “N/A” next to the facility name where the score would otherwise appear.

For additional assistance with Portfolio Manager and your benchmark score, contact the EPA’s help desk at: buildings@energystar.gov. For additional assistance with ABS, contact SoCalGas’ benchmarking help desk at benchmarking@semprautilities.com.

---

**BENCHMARKING FREQUENTLY ASKED QUESTIONS**

It’s been more than one business day; why hasn’t my energy data shown up in my Portfolio Manager account yet?
Refer to the “Trouble-Shooting” section in this document.

How can I improve my ENERGY STAR score?
SoCalGas wants to help you save energy and improve your score! To find out more about our many programs that can help you save energy and money, visit socalgas.com (search “BUSINESS”) or call our Energy Information Center at 1-888-431-2226. Energy audits and cash incentives for new equipment are among the many services we offer.

What buildings are eligible for benchmarking and receiving the ENERGY STAR label?
Refer to the ENERGY STAR website, which describes the building criteria necessary to receive a rating:
[energystar.gov/index.cfm?c=eligibility.bus_portfoliomanager_eligibility](https://energystar.gov/index.cfm?c=eligibility.bus_portfoliomanager_eligibility)

What if ENERGY STAR does not have a space type for my building?
If ENERGY STAR does not currently have a space type that matches your facility, you can still use Portfolio Manager to track your energy use, greenhouse gas emissions and energy-efficiency improvements. Use the “Other” space type if none of the other choices apply.

If energy data is still not uploaded within one business day, you may be requesting data for a “closed” account. SoCalGas is unable to provide energy use history for closed accounts at this time.

If you continue to have issues with uploading billing data via SoCalGas' ABS system, please contact our help desk at: benchmarking@semprautilities.com.

Where can I get more help?
For questions related to ENERGY STAR Portfolio Manager, make sure to check the Frequently Asked Questions, which can be accessed from the top right corner of any page in Portfolio Manager. For additional assistance, contact buildings@energystar.gov.

Also, consider attending one of our hands-on benchmarking workshops. Visit socalgas.com (search “ERC”) for upcoming workshops on benchmarking with Portfolio Manager.
This information is provided solely for informational purposes. Although Southern California Gas Company has used reasonable efforts to assure
its accuracy, no representation is made that the contents are free from error or suitable for use for any particular purpose. Southern California
Gas Company assumes no responsibility for use of, or reliance on, this information by any party, and specifically advises such parties to discuss
any decisions or actions related hereto with their own advisors and experts.

SoCalGas’ energy-efficiency programs are funded by California utility customers and administered by Southern California Gas Company under the
auspices of the California Public Utilities Commission. Programs are available on a first-come, first-served basis until program funds are no longer
available. Other conditions apply; find out how to qualify at socalgas.com/energyefficiency. Southern California Gas Company is not responsible
for any goods or services selected by the customer.

©2011 Southern California Gas Company. All copyright and trademark rights reserved.