Energy Star PortfolioManager® Utility Automation Guide

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Department of General Services
Office of Sustainability

Contents

Introduction

Utility data can be automatically uploaded by utility companies for many electric and gas meters in the state's building portfolio. Utility data automation will save your department time on data entry as monthly meter updates will automatically transfer to Energy Star PortfolioManger® (ESPM) once set up. In addition, automation reduces the chance for human data entry errors thus ensuring more accurate data. Some utility companies may be able to provide historical data automated, upon request. This guide will help you set up the automatic meter upload process in ESPM for five of the largest utility companies in California, Pacific Gas and Electric, Sacramento Municipal Utility District, Southern California Edison, San Diego Gas and Electric, and Southern California Gas Company.

Reminders before you set up Automatic Uploads

- ✓ Ensure all of the meters have been added to the property profile.
- ✓ Collect the Service ID or Meter Number for each meter.
- ✓ Ensure meter names match meter numbers or service ID numbers, depending on utility company (See individual utility companies for more information)
- ✓ Ensure the city name is spelled correctly in the address for each property and the zip code matches billing information.
- ✓ Delete any manually entered meter data if requesting historical meter data from the utility or duplicates may occur.

Pacific Gas and Electric (PG&E)

How to Initiate Automatic Upload of Consumption Data

To provide Pacific Gas and Electric access to share data automatically you must first connect with PG&E:

- Click on the **Contacts** link on the top right hand corner of the ESPM home page.
- This takes you to your **My Contacts** list. Click **Add Contact.**
- In the **Find Contact** section, search for PG&E by entering **Pacific Gas and Electric** in the **Name** field or by entering **benchmarking@pge.com** in the **Email** field. Click **Search.**
- When the page refreshes, **Pacific Gas and Electric Company** will appear on the right-hand side of the page. Click **Connect**.
- Enter the name and email address of the individual authorizing the connection with PG&E. Next, read and agree to PG&E's Terms of Use. Click **Send Connection Request**.

The top of the next page will show a green bar, confirming your connection request was sent to PG&E. **Note**: You are not yet connected to PG&E. PG&E must first <u>accept</u> your request. You will receive an email notification when PG&E accepts your request. The connection and notification typically takes less than 24 hours.

After you have received notification that your connection request has been accepted, you will then need to share your properties and meters with the PG&E's account.

- Go to the **Sharing** tab click the **Share a Property** button.
- Select which properties you wish to share. You have the option to share **one property**, to select **multiple properties**, or to **share all properties**. Select the property(ies) you would like PG&E to provide web services.
  - If you select multiple properties, a pop up window will allow you to filter and select the specific properties you want to share. You can filter by region or building type, or use the checkboxes to select one property at a time.
- To authorize PG&E to provide data automatically select **Pacific Gas and Electric Company**. Click **Continue.**
  - Select the **Exchange Data** radio button as the permission level to grant PG&E access.
  - When the **Exchange Data** radio button is clicked, a pop-up window will appear. First, enter the name of the **Property Owner.** Next, for the meter(s) you would like to connect with PG&E's Web Services, click the **Full Access** radio button(s). You will not receive data from PG&E unless **Full Access** has been selected.
  - In the **ID Type** field, input an **S** if you will be providing the **Service Agreement ID Number** or an **M** if you will be providing the **Meter Number**.
    - NOTE: All meter data for a property must be requested through this step. PG&E does not provide aggregated data for properties, only

individual meter data.

- Scroll down and click **Apply Selections & Authorize Connection.**
- When the pop-up window has closed, be sure to click **Share Property(ies)** to complete the data exchange request.

A green bar will appear at the top of the sharing tab, confirming the request was submitted. Your request should be processed within 1-2 business days after the customer authorization to release meter data has been received (see steps below). Each shared meter will receive up to three years of meter history and will be updated once per month going forward.

Meter data will not be uploaded to ESPM until the Service Agreement ID has been authorized for release by the customer of record. See below for more information on completing the customer authorization release.

Customer Authorization

Once you've shared your properties and meters you must authorize the release of meter data for each meter shared with PG&E in ESPM. Customers will need to complete the ESPM Web Services Data Authorization form, designating the building owner as the third-party authorized to receive their meter data. PG&E cannot provide aggregated data for each building, all meter data must be authorized for release by the customer of record.

NOTE: Since this process involves releasing data to ESPM and the U.S. Environmental Protection Agency (EPA), all meters must be authorized for release even if the building owner is the customer of record for the meter.

This process can only be completed after the Property in ESPM has been shared with PG&E but BEFORE you share meters. Data will not be uploaded to ESPM until this step is complete.

To authorize release of the data, each customer of record must submit the ESPM Web Services Data Authorization form to PG&E. **The customer should have their monthly bill available to simplify this process.**

- The building owner will receive a confirmation email from PG&E that the property has been shared, which will include a reminder that all meters must have a customer authorization on file before data can be released. Links to the form and www.pge.com/benchmarking will be included.
- After the property has been shared with PG&E, the building owner will ask the customer to complete the authorization process. It is critical that the building owner waits until after the property has been shared with PG&E, as the PG&E IT process uses the building information from ESPM to pre-load information in the online form for each customer.
- For the form, the customer will need to enter the account number and either the phone number or meter number to access the form. The form will be pre-populated with the Service Agreement IDs tied to the account. The customer will

need to denote if data is being authorized or revoked for release, select the Service Agreement IDs to be released, and designate an Authorized Third Party. The customer can search for the Property Owner by searching on their building's address. The customer may designate up to ten Authorized Third Parties. If the customer has multiple accounts, the form will need to be submitted for each account.

- The IT process will check for authorizations for 30 days. If the authorization is not confirmed within this time, an email will be sent to building owners reporting that meters have not been authorized for release. The building owner will have the responsibility for reconciling this with the tenant.

Past Meter Energy Data
For meters that have been successfully shared, PG&E will populate up to three years of energy data for that meter, with the following exceptions:

- The meter has existed for less than three years (e.g., a meter in a new building).
- The customer of record for the meter billing data has changed. In that case, only data for the current customer of record will be provided. The "customer of record" is determined by the actual customer, not the Account ID, Service ID number or Meter Number.
- If there are existing meter entries that were entered manually, PG&E's Web Services will not overwrite them; instead, entries will only be populated going forward from the last manual entry.

Monthly Updates
For meters that have been successfully validated, PG&E will update the meter with new entries as new billing data becomes available, with the following exceptions:

- If the meter becomes inactive, PG&E will automatically mark it as inactive in ESPM. If it is re-activated under the same customer, it will start updating again.
- If the customer of record for the meter changes, PG&E will stop updating the meter. To continue receiving new meter entries, you will need to reshare the meter with the most current Service ID or Meter Number. You will need to **Edit Settings** for **Exchange data** to reestablish the connection for any meter that had previously been shared.

Additional Resources

PG&E Benchmarking Website
PG&E Benchmarking How-To Guide

Benchmarking Contact

benchmarking@pge.com

Account Representative

Felix Lopez
(415) 407-2315
FAL1@pge.com

Sacramento Municipal Utility District (SMUD)

How to Initiate Automatic Upload of Consumption Data

For continuous data sharing you will need your **Account Number** and **Location Number**.

To provide Sacramento Municipal Utility District access to share data automatically you must first connect with SMUD:

- Click on **Contacts** at the top right hand corner of the ESPM home page.
- Click on the **Add Contact** button. This takes you to your **My Contacts** list. Click **Add Contact.**
- In the **Find Contact** section, search for SMUD by entering **Sacramento Municipal Utility District** in the name field, click **Search**. Once the contact comes up, click on the **Connect** button.
- Answer the “Are you benchmarking a building for a State of CA Government Agency?” question, read and agree to the Terms of Use, and click on the **Send a Connection Request** button.
    - You should see a green bar confirming that your connection request was sent to SMUD. You will receive a notification when SMUD accepts your request. This process takes 24 to 48 hours.

After the contact is accepted you will then need to share your properties and meters with the SMUD account.

- Click on the **Sharing** tab and then click on the **Share a Property** button.
- Select the number of properties and the properties you would like to share.
    - If you select multiple properties, a pop up window will allow you to filter and select the specific properties you want to share. You can filter by region or building type, or use the checkboxes to select one property at a time.
- Select **Sacramento Municipal Utility District** from your contacts and click on the **Continue** button.
- Next to each property, select the **Exchange Data** radio button.
- In the popup window, select the **Full Access** radio button next to all of the meters you would like to connect with SMUD web services.
    - Select **N** to establish a continuous data feed, and provide your **Account Number** and **Location Number**.
- Click on the **Apply Selections & Authorize Connections** button to save and close the popup window.
- Click on the **Share Property(ies)** button.
    - You should see a green bar at the top of the Sharing tab confirming the request was submitted. You will receive a notification when SMUD has accepted your property share request. This process takes 24 to 48 hours.

Customer Authorization
SMUD does not require a separate customer authorization form, the entire process is done through ESPM.

Additional Resources

[SMUD Benchmarking Website]

Benchmarking Contact

Benchmark@SMUD.org

Account Representative

Joey Penneman
(916) 732-6595
Joseph.Penneman@smud.org

Southern California Edison (SCE)

How to Initiate Automatic Upload of Consumption Data

To provide Southern California Edison access to share data automatically you must first connect with SCE:

- Click on the **Contacts** link in the top right corner of the ESPM home page.
- This takes you to your **My Contacts** list. Click **Add Contact.**
- In the **Find Contact** section, search for SCE by entering **Southern California Edison** in the name field, click **Search**. Once the contact comes up, click on the **Connect** button.
- In the box next to **Contact name**, search for **Southern California Edison**. Select **Search**.
- Once Southern California Edison's Automated Data Exchange Service comes up, select **Connect**.

To connect with SCE, enter the following data:

  - Your Customer Account Number (ex: 2-00-000-0000 (with dashes))
  - Your Authentication Key (Last Four Digits of Tax ID or Social Security Number)
  - Your Name
  - Your Phone Number
  - Your Email Address

- Read and Agree to SCE's Terms and Conditions.
- Click **Send Connection Request**.

SCE processes connection requests every couple of hours. As soon as you submit your request, you will see a notification that your request has been submitted. Once your request is approved, you will see a notification in your **My Portfolio** tab that you are connected to Southern California Edison.

Note: If there is an error or discrepancy with any of the data that has been submitted to SCE, you will also get a notification about the specific issue.

After the contact is accepted you will then need to share your properties and meters with the SCE account.

- In the **Sharing** tab, select **Share a Property** to select the property you want to share with **Southern California Edison**.
- Select which properties you wish to share. You have the option to share **one property**, to select **multiple properties**, or to **share all properties**. Select the property(ies) you would like SCE to provide web services.
  - If you select multiple properties, a pop up window will allow you to filter and select the specific properties you want to share. You can filter by region or

building type, or use the checkboxes to select one property at a time.

- To authorize SCE to provide data automatically select **Southern California Edison**. Click **Continue.**
- Select the radio button under **Exchange Data** for Southern California Edison to provide your energy data.
- Select **Share Property(ies**) to share your property(ies) with the Southern California Edison account.
- SCE requires answers to the following questions:
    - **Building Owner?** Select **Y** for Yes if you are the owner or **N** for No if not.
    - **Are you benchmarking for the purpose of AB 1103?** Select **Y** for Yes if you are the owner or **N** for No if not.
- When making the share, everything must be shared with **Full Access**, otherwise the share will be rejected and no data will be given for that property/meter.
    - Note that SCE may need to create a new meter in a property in some situations where aggregate energy usage data are provided.
- Enter in your **Service Account Number** (ex, 3-000-0000-00) with the dashes.
- The Service Account Number you enter will match the Service Account Number you entered for the Meter Name.
- Select **Apply Selections & Authorize Connection**.

Within one business day of your authorizing the connection, SCE will upload energy data to your ESPM account.

Customer Authorization
SCE has implemented an Authorization Form which customers may use to give authorization to a designated Agent to receive service account information or act on their behalf. A completed Authorization form is required to be submitted directly to SCE from anyone requesting data for an account who is not the owner of that account before data can be sent to Portfolio Manager. ***Customers requesting data for their own accounts do not need to submit an authorization form.***

If an Authorization Form is needed, submit a completed Authorization Form, via email to 3rdparty@sce.com. **Note: Allow 5 working days for processing before submitting your meter share requests via Portfolio Manager**.

For help on filling out and submitting the authorization form, please refer to the Authorization Form Instructions.

The two typical scenarios when authorization forms are needed are:

- A building owner who is requesting the tenant's data.
- A third party (such as a benchmarking consultant) who is benchmarking a building on behalf of a customer and is requesting the building owner's (and/or tenant's) data.

In addition to submitting a completed authorization form, the third party should use their (the third party company's) own **Customer Account Number** and **Authentication Key** to request to connect with SCE. The third party should name the meters with the **Service Account Number(s)** that are associated with the building they are trying to benchmark. If the third party does not have a SCE Customer Account Number, a Customer Account Number can be obtained by calling SCE's Commercial and Industrial Call Center at (800)-990-7788 and providing information about the company's Tax ID together with other general information.

An SCE customer can authorize SCE to share data with third parties, but it is the customer's responsibility to understand the access that a third party can have. The Authorization Form is designed to protect the privacy rights of SCE's customers. Any alterations to the Authorization Form after it has been executed by a customer will render the Authorization Form null and void.

Additional Resources

SCE Benchmarking Website
SCE Benchmarking Guideline
Benchmarking Authorization Form

Benchmarking Contact

benchmarking@sce.com

Account Representative

Lisa Hannaman
(714) 895-0616
lisa.hannaman@sce.com

San Diego Gas and Electric (SDG&E)

How to Initiate Automatic Upload of Consumption Data

Please have available: meter number, account number and the last amount of your bill. First change all of your meter names to the 8 digit SDG&E meter number.

To provide San Diego Gas and Electric access to share data automatically you must first connect with SDG&E:

- Click on the **Contacts** link on the top right hand corner of the ESPM home page.
- This takes you to your **My Contacts** list. Click **Add Contact.**
- In the **Find Contact** section, search for SDG&E by entering **SDGE Benchmarking** in the name field, click **Search**. Once the contact comes up, click on the **Connect** button.
    - o Requests are processed once a day at 1PM, so after you've made the add request it will be accepted automatically at that time.

After the contact is accepted you will then need to share your properties and meters with the SDGE account.

- Go to the **Sharing** tab, click the **Share a Property** button.
- Select which properties you wish to share. You have the option to share **one property**, to select **multiple properties**, or to **share all properties**. Select the property(ies) you would like SDG&E to provide web services.
    - o If you select multiple properties, a pop up window will allow you to filter and select the specific properties you want to share. You can filter by region or building type, or use the checkboxes to select one property at a time.
- To authorize SDG&E to provide data automatically select **SDGE Benchmarking**. Click **Continue.**
- Select the radio button under **Exchange Data** for **SDGE Benchmarking** to provide your energy data.
- This will bring up a popup window where you will have to fill in the account number and last bill amount for each of the meters you have for the property.
    - o Answer the questions based on what your needs are.
    - o When making the share, everything must be shared with **Full Access**, otherwise the share will be rejected and no data will be given for that property/meter.
- After you've gone through all of your properties and entered all of the account numbers and bills for each meter, click **Finish and Share Property(ies)**.
    - o This will send the share request to the automated system to process. Once processed, the system will upload any consumption data that is in the system for each meter that is shared.

Customer Authorization

Typically if it is a state owned facility which is also occupied by only state departments, an authorization to release information is not required. However, if the building is owned by the state but they are leasing it to a non-state entity, the tenant of that property would need to fill out an authorization in order for the state to benchmark the building. To request this form please contact benchmarking@semprautilities.com.

Additional Resources

SDG&E Benchmarking Website

Benchmarking Contact

benchmarking@semprautilities.com

Account Representative

Jeff Alexander
(858) 636-5762
jalexander@semprautilities.com

Southern California Gas (SoCalGas)

How to Initiate Automatic Upload of Consumption Data

Please have available: meter number, account number and the last amount of your bill.

To provide Southern California Gas Company access to share data automatically you must first connect with SoCalGas:

- Click on the **Contacts** link on the top right hand corner of the ESPM home page.
- This takes you to your **My Contacts** list. Click **Add Contact.**
- In the **Find Contact** section, search for SoCalGas by entering **Southern California Gas Company** in the name field, click **Search**. Once the contact comes up, click on the **Connect** button.

After the contact is accepted you will then need to share your properties and meters with the SoCalGas account.

- Go to the **Sharing** tab click the **Share a Property** button.
- Select which properties you wish to share. You have the option to share **one property**, to select **multiple properties**, or to **share all properties**. Select the property(ies) you would like SoCalGas to provide web services.
    - If you select multiple properties, a pop up window will allow you to filter and select the specific properties you want to share. You can filter by region or building type, or use the checkboxes to select one property at a time.
- To authorize SoCalGas to provide data automatically select **Southern California Gas Company**. Click **Continue.**
- Select the radio button under **Exchange Data** for **Southern California Gas Company** to provide your energy data.
- This will bring up a popup window where you will have to fill in the account number and last bill amount for each of the meters you have for the property.
    - Answer the questions based on what your needs are.
    - When making the share, everything must be shared with **Full Access**, otherwise the share will be rejected and no data will be given for that property/meter.
- After you've gone through all of your properties and entered all of the account numbers and bills for each meter, click **Finish and Share Property(ies)**.
    - This will send the share request to the automated system to process. Once processed, the system will upload any consumption data that is in the system for each meter that is shared.

Customer Authorization

Once you've shared your properties and meters you must authorize the release of meter data for each meter shared with SoCalGas in ESPM. Customers will need to complete the complete the Customer Authorization Standardized Request (CISR) and email to SCGBenchmarking@semprautilities.com before meter data will be shared.

Additional Resources

SoCalGas Benchmarking Website

Benchmarking Contact

SCGBenchmarking@semprautilities.com

Account Representative

Jason Lewis
(213) 784-0701
jlewis2@semprautilities.com