

Frequently Asked Questions

How do I know if my facility must be benchmarked?

All buildings must be benchmarked if they are State-owned or leased and occupied by humans at least part of the time or if the State pays the utility bill - whether or not the facility is leased to or from other State Departments or non-State entities. The only exception is if the amount your Department pays for utilities is included in the total monthly charges paid to your building owner such that it is difficult to discern how your monthly fees are divided. *The bottom line is that all facilities your department pays utility bills for must be included in your benchmarking portfolio.*

What part of the energy data benchmarking is my responsibility?

The Benchmarking lead at each department is responsible for the upkeep of the facility portfolio and energy database.

- The original list of facilities in your Portfolio Manager account was taken from the State Property Inventory list. Keeping this list up-to-date is your responsibility. If a new facility is added to your property inventory, it is your responsibility to add it to Portfolio Manager. If the physical or operating characteristics of any facility in your portfolio change, it is your responsibility to change the appropriate information in Portfolio Manager.
- Departments have assigned account numbers and unique identifiers for each energy meter on each facility. It is your responsibility to ensure that all meters are entered into all facilities and that data is available for all months starting in January 2003. For utilities with automated benchmarking capabilities, this also requires that you provide a signed data release authorization for each utility. For facilities served by non-participating utilities, you must obtain historical energy usage data from the utility, beginning January 2003, and upload this data into Portfolio Manager.

What are the key pieces of data necessary for each facility?

You should ensure that each of the facilities in your portfolio have accurate and complete information for the following:

- Energy data
- Square footage
- Year built

How do I know if my energy data is incomplete or otherwise not right?

The best way is to check the “Adjusted Percent Energy Reduction” value. If it says “N/A” – you’ve got trouble with your energy data.

What are the critical items to check for when looking for problems in my portfolio?

The first things you should check in your portfolio are:

- Adjusted Percent Energy Reduction – there should not be any ‘N/A’s in this column
- Energy Use Alerts – resolve any issues identified in this column. Often times, this will be resolved by correcting the problem(s) identified in the Adjusted Percent Energy Reduction, so it is best to start with those.

Whom do I contact to help me fix my data?

If there are problems with your facility, space or meter data, you should be able to fix it yourself. If you need help with this, contact Amy Barr at 916-962-7001.

If there are problems with your energy data, you should contact your utility. If the problem pertains to issues with Portfolio Manager, click the Help button at the top of any Portfolio Manager window to see the help topics. They offer assistance for every step in rating energy performance and applying for ENERGY STAR® recognition. You can also contact the Portfolio Manager Administrator at energystarbuildings@epa.gov or the Toll Free Hotline at 1-888-STAR-YES.

How do I know if my utility is participating in automatic data uploads?

Utilities with automated benchmarking capabilities include PG&E, SDG&E, SoCalGas, SCE, and SMUD.

How do I get data from utilities without automatic data uploads?

You must submit a data request form to non-automated utilities, asking for monthly data back to January 2003, preferably in an Excel spreadsheet. In Portfolio Manager, account you can use the 'Update Multiple Meters' feature to upload the data.

How can I display all of my facilities on one screen in Portfolio Manager?

To show all your facilities on one page:

- Download them to Excel
- Click on 'View All' in the dark blue bar at the top of the facility list
- Go to 'Edit View' and click on display 'All' facilities

Why am I not getting an Energy Performance Rating?

There are several potential reasons:

- In most cases, lack of a Rating indicates that your building is something Other than an Office or a Warehouse. You can confirm this by clicking on the facility name and checking the status of the Space Type. If it says "Other", you cannot get a Rating.
- Portfolio Manager requires 12 months of utility billing data to calculate a benchmark. If Portfolio Manger is unable to generate an energy performance score, energy data should be checked for gaps or overlaps in periods of consumption and meters with less than eleven months of data. From the Facility Summary Energy Meters section, click on a Meter Name. To edit dates, energy consumption, or cost, make changes to the respective field and click SAVE at the bottom of the screen.

Why does my facility show no reduction figures? Or N/A?

Your Adjusted Percent Energy Reduction will show 'No Reduction' if the Normalized Source Energy for your Current Period is higher than that for your Baseline Period, meaning that there is a NEGATIVE savings for your facility. Portfolio Manager will display 'N/A' if it is unable to calculate a Percent Energy Reduction. This is usually because there is missing energy meter data for either the current year, the baseline year, or both.

What do I do with a facility that has been sold or is now inactive in our portfolio?

If you sell a building, do not remove it from Portfolio Manager. Leaving it in not only provides a more accurate reflection of your portfolio, but also should improve your score. If you own a building but lease it to an outside organization and don't pay the utility bill, it's essentially the same as selling the building, so you want to treat it the same way: leave it in your portfolio, but make it inactive.

My agency recently added a new facility to our portfolio – how do I reflect that in Portfolio Manager?

If you add a new facility or build a new building, click on 'Add a Property' in Portfolio Manager and follow the steps. You will almost always check the first Property Type option, 'A single facility for which my organization owns or manages 90% or more of the floor area.' Enter in the required information about the facility, leaving the bottom section blank (the organization that owns the facility and the primary service and product provider), unless you know that information and want to complete that part. Be sure to share that facility with California State Master account. You must also share the new facility with any participating utilities – in doing so, they will get an email notification, which alerts them to the presence of this new facility in your portfolio so they can set it up for automatic data uploads.

Why is my facility not eligible for the ENERGY STAR® Buildings Award?

Facilities are eligible to receive the ENERGY STAR® label if they are greater than 5,000 ft², receive an energy performance rating of 75 or higher, have at least 12 months of energy data available for all fuel types. Additionally, at least half of a facility's gross floor area must be used as an eligible primary space type – in most cases, an Office or Warehouse.

Should I enter energy from photovoltaic systems on my facility?

You may enter PV data as a separate meter, but check the box in the Meter characteristics page that says "No, adding this meter to this facility's total energy use will inflate the actual value".

We purchase green power for some of our facilities – how do we enter that?

If you purchase green power, to meet LEED credit for instance, it is entered into Portfolio Manager in the same way as other energy sources. Unfortunately, there is no difference in the program between the two types of energy. It has been requested to the designers, but has not yet been addressed.

What should I do once my portfolio is perfect?

After you have resolved all problems within your portfolio and have all the necessary information entered for each facility, you should identify the buildings that are the best candidates for increasing efficiency. When you are ready to start improving those buildings, call:

- Your utility representative
- DGS' Retrocommissioning Program
- EPAC