

Benchmarking Compliance Checklist

This Compliance Checklist is a quick guide to get you started with benchmarking your building. Please visit the **San Diego Energy Benchmarking Website** for instructional videos and other resources: www.sandiego.gov/benchmark.

1. Determine Applicability – Suggested Completion Date: March 20		
<input type="checkbox"/>	Refer to benchmarking website to determine if you are required to report.	<ul style="list-style-type: none"> Refer to “What’s Covered?” page on sandiego.gov/benchmark
<input type="checkbox"/>	If applicable, submit an exemption request.	<ul style="list-style-type: none"> Click ‘Request an Exemption’ on “What’s Covered?” page of sandiego.gov/benchmark If an extension is granted, proceed with Steps 2 and 3, but do not include any energy data

2. Prepare Your Report – Suggested Completion Date: April 24		
<input type="checkbox"/>	Create a Portfolio Manager account	<ul style="list-style-type: none"> You may use existing Portfolio Manager accounts and property(ies), if they exist Visit https://portfoliomanager.energystar.gov/pm/signup
<input type="checkbox"/>	Set up your property in Portfolio Manager. If one already exists, confirm use details are up to date.	<ul style="list-style-type: none"> Refer to video Modules 1 and 2 on “Submit Data” page at sandiego.gov/benchmark Required information for various property types is available at: https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheetsheet Enter your property information
<input type="checkbox"/>	Compile energy data from calendar year 2019.	<ul style="list-style-type: none"> Refer to video Modules 3 and 4 on “Submit Data” page at sandiego.gov/benchmark Log into SDG&E’s Benchmarking Portal to request whole-building data for the previous calendar year: sdge.com/benchmarking Enter your December 2018 bill if you are not billed by calendar month.

3. Report to the City – Required Completion Date: June 1		
<input type="checkbox"/>	Run the Data Quality Checker prior to submission	<ul style="list-style-type: none"> Refer to video Module 5 on “Submit Data” page at sandiego.gov/benchmark Fix any errors prior to proceeding with your report.
<input type="checkbox"/>	Submit the report to the City through Portfolio Manager	<ul style="list-style-type: none"> Click on the current reporting link on “Submit Data” page at sandiego.gov/benchmark.