

Compliance Checklist

This Compliance Checklist is intended to guide you through the compliance process for the Chicago Energy Benchmarking Ordinance, especially if you have not complied in the past. Please do not submit this form. All steps below should be completed by **June 1 each year**. Please visit the **Chicago Energy Benchmarking Website** for step-by-step instructions, trainings, and other resources: www.CityofChicago.org/EnergyBenchmarking.

1. Get Started - Suggested Completion Date: March 24th		
<input type="checkbox"/>	Determine whether your building(s) must comply in the current year	<ul style="list-style-type: none"> All commercial, institutional, or residential buildings 50,000 square feet or greater are required to comply. If you believe your building(s) is not required to comply, please submit an exemption form: http://www.CityofChicago.org/EnergyBenchmarking
<input type="checkbox"/>	Identify a benchmarking lead	<ul style="list-style-type: none"> Designate a building staff member or 3rd party partner. Arrange for in-house or 3rd party data verification. Only needed every 3 years: See page 1 of your compliance notification letter or the Covered Buildings List (on the Chicago Data Portal) for the next year of required verification (Step #3).

2. Benchmark Your Building(s) - Suggested Completion Date: April 28th		
<input type="checkbox"/>	Create a Portfolio Manager account	<ul style="list-style-type: none"> You may use existing Portfolio Manager accounts and profile(s), if they exist Visit http://www.energystar.gov/portfoliomanager
<input type="checkbox"/>	Gather basic information required by Portfolio Manager and set up property profile(s), if no profile exists	<ul style="list-style-type: none"> Required info for various property use types is available at: http://www.energystar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details Refer to the <i>Benchmarking Guide</i> at http://www.CityofChicago.org/EnergyBenchmarking
<input type="checkbox"/>	Request whole-building data. You are strongly encouraged to take advantage of aggregated, whole-building electricity and natural gas data provided by local utilities at no additional charge to covered buildings.	
	<input type="checkbox"/>	Electricity: Log into the ComEd's Energy Use Data System, if an account already exists. (If needed, set up a new account.) Request whole-building data for the previous calendar year: https://www.comed.com/WaysToSave/ForYourBusiness/Pages/EnergyUsageData.aspx
	<input type="checkbox"/>	Natural Gas: Request whole-building natural gas use data for the previous calendar year from Peoples Gas: www.PeoplesGasDelivery.com/Business/Aggregation.aspx
	<input type="checkbox"/>	Other Fuel Types: Refer to monthly bills for other fuel types (ex: chilled water, steam, diesel, oil, etc.)
<i>Note: You may also enter monthly energy use data directly from energy bills, if whole-building data is available (i.e. if you have access to all the meter(s) providing energy to the building.)</i>		
<input type="checkbox"/>	Enter property uses & details into profile(s), if needed	<ul style="list-style-type: none"> On the Details tab, use the Add Another Type of Use menu to select a property use. Click Add and enter requested info and repeat for add'l property uses.
<input type="checkbox"/>	Enter energy use data for all fuel types	<ul style="list-style-type: none"> If meters are already set up, start entering data on the Energy tab. If no meters are set up, click Add Another Meter. Enter requested info and repeat for add'l meters or fuels. Note: Chicago's ordinance does not require water or cost data.
<input type="checkbox"/>	Enter your Chicago Energy Benchmarking ID(s)	<ul style="list-style-type: none"> On the Details tab, click Edit under Unique Identifiers (IDs). From Standard IDs, select Chicago Energy Benchmarking ID. Enter the 6-digit ID (listed on notification letter or the Covered Buildings List).

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3. Verify Building Data - Suggested Completion Date: May 12 (Official data verification is required every three years)		
<input type="checkbox"/>	Generate a Data Verification Checklist in Portfolio Manager	<ul style="list-style-type: none"> • Check the first page of your notification letter or the Covered Buildings List to determine the next year for required data verification (required every 3 years) • If required this year: On the Reporting tab, under Energy Star Performance Documents, click Data Verification Checklist. • Specify Single Year timeframe, ending Dec 31 of the previous calendar year using the dropdown boxes, and download the Data Verification Checklist. • Buildings do not need to submit the signed Data Verification Checklist to the City, but buildings are required to produce it upon request.
<input type="checkbox"/>	Have a recognized professional review and sign the Data Verification Checklist and save it for your records.	<p>Recognized data verifier credentials (as of February 2017):</p> <ul style="list-style-type: none"> • Professional Engineer (State of IL) • Licensed Architect (State of IL) • Building Operator Certification Level I (MEEA) • Building Energy Technology Certificate (City Colleges of Chicago) • Certified Energy Manager (AEE) • Building Energy Assessment Professional (ASHRAE) • Facility Engineering Technology Course 220 (offered by IUOE Local 399 and Triton College)
<input type="checkbox"/>	Add data verifier information to Portfolio Manager	<ul style="list-style-type: none"> • On the Details tab, scroll down to the Property Notes field. • In the text field, type: verifier's name, organization, email, recognized credential, unique identifying information (ex: license or certificate number), and (MOST IMPORTANTLY): the date of verification (month / day / year).

4. Report to the City – Required Completion Date: June 1		
<input type="checkbox"/>	Generate and review the building's report in Portfolio Manager	<ul style="list-style-type: none"> • Click on the current reporting link at www.CityofChicago.org/EnergyBenchmarking. • Scroll down to Your Response, select building(s) from the Properties dropdown box, and click Generate Response Preview. • Review any data alerts or other instructions that may appear. • In the Templates and Reports table, find the row for [current year] Chicago Energy Benchmarking Reporting; under the Action menu in that row, select Download Preview in Excel from the dropdown box. • Review the resulting Excel preview data that will be shared with the City (fields that do not apply to the building will be left blank).
<input type="checkbox"/>	Submit the report to the City through Portfolio Manager	<ul style="list-style-type: none"> • On the Reporting tab, in the Templates and Reports table, find the row for [current year] Chicago Energy Benchmarking Reporting; under the Action menu, select Send Response (Note: reporting to the City is distinct from sharing data in Portfolio Manager's Sharing tab). • Review any data alerts or other instructions that may appear. • Enter requested information, e-sign with your Portfolio Manager username and password and click Send Data. • Save the ENERGY STAR Portfolio Manager confirmation email.

Questions? We Can Help!

- Instructions, training, and other free resources: www.CityofChicago.org/EnergyBenchmarking
- Chicago Energy Benchmarking Help Center: (855) 858-6878 (M-F, 9:00am-5:00pm) or email Info@ChicagoEnergyBenchmarking.org