Compliance Checklist

This Compliance Checklist is intended to guide you through the compliance process for the Chicago Energy Benchmarking Ordinance. Please do not submit this form. All steps below should be completed by **June 1, 2016**. Please visit the **Chicago Energy Benchmarking Website** for step-by-step instructions, training sign-up, and other free resources: www.CityofChicago.org/EnergyBenchmarking.

1. Get Started - Suggested Completion Date: March 28, 2016		
☐	Determine whether your building(s) must comply in 2016	• Residential buildings 50,000-250,000 square feet must benchmark (Step #2), verify (Step #3), and report (Step #4). • Commercial, institutional, and residential buildings that complied in 2014 and/or 2015 must benchmark (Step #2) and report (Step #4). • If you believe your building(s) is not required to comply, please submit an exemption form: http://www.CityofChicago.org/EnergyBenchmarking
☐	Identify a benchmarking lead	• Designate a building staff member or 3rd party partner. • Arrange for in-house or 3rd party data verification (Step #3).

2. Benchmark Your Building(s) - Suggested Completion Date: April 25, 2016		
☐	Create a Portfolio Manager account	• Visit http://www.energystar.gov/portfoliomanager • You may use existing Portfolio Manager accounts and profile(s)
☐	Gather basic information required by Portfolio Manager and set up property profile(s)	• 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 *Benchmarking Guide* at http://www.CityofChicago.org/EnergyBenchmarking
☐	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.	
	☐ Electricity: Request whole-building 2015 electricity use through ComEd's Energy Use Data System: www.ComEd.com/EnergyUsageData	
	☐ Natural Gas: Request whole-building 2015 natural gas use data from Peoples Gas: www.PeoplesGasDelivery.com/Business/Aggregation.aspx	
	☐ Other Fuel Types: Refer to monthly bills for other fuel types (ex: chilled water, steam, diesel, oil, etc.)	
	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.)	
☐	Enter property uses & details into profile(s)	• 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.
☐	Enter energy use data for all fuel types	• On the ENERGY tab, click ADD ANOTHER METER. Enter requested info, and repeat for add'l meters or fuel types. • Note: Chicago's ordinance does not require water or cost data.
☐	Enter your Chicago Energy Benchmarking ID(s)	• 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).

	3. Verify Building Data - Suggested Completion Date: May 9, 2016 (for first-time compliers only; official data verification is required every three years)	
☐	Generate a Data Verification Checklist in Portfolio Manager	• On the REPORTING tab, under ENERGY STAR PERFORMANCE DOCUMENTS, click DATA VERIFICATION CHECKLIST. • Specify SINGLE YEAR timeframe, ending DEC 31 2015 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.
☐	Have a recognized professional review and sign the Data Verification Checklist and save it for your records.	Recognized data verifier credentials (as of February, 2016): • 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)
☐	Add data verifier information to Portfolio Manager	• 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 date of verification.

	4. Report to the City – Required Completion Date: June 1, 2016	
☐	Generate and review the building's report in Portfolio Manager	• Click on the 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 2016 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).
☐	Submit the report to the City through Portfolio Manager	• On the REPORTING tab, in the TEMPLATES AND REPORTS table, find the row for 2016 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