

Appendix Y Tier 2 covered buildings reporting requirements—This is a normative annex and is part of the Tier 2 covered building requirements of this standard.

Y1 BUILDING OWNER NOTIFICATIONS BY THE AHJ

Y1.1 Notification to building owners of covered buildings by the AHJ. Based on records obtained from each county assessor and other available information sources, the *AHJ* may create a database of *covered buildings* and *building owners* required to comply with the standard established in accordance with this section. The database may include *buildings* and *building complexes* presumed to meet the definition of *covered building*.

Y1.1.1 The database may contain information about *buildings* that may be subject to compliance and their owners. The database may also contain information to assist tracking and reporting on *building owner* compliance, and incentive application and distribution.

Y1.2 By July 1, 2025, the *AHJ* must provide the owners of *covered buildings* with notification of compliance requirements. Notifications will be mailed to the mailing addresses county assessors have on file. The *AHJ* will attempt to notify known covered building owners, but some covered buildings owners may not receive a notification.

Y1.3 When a *covered building* undergoes a change of ownership, it is the seller's responsibility to provide the buyer any information it has received from the *AHJ* regarding this program and it is the buyer's responsibility to promptly contact the *AHJ* and update the *covered building's* profile.

Y1.4 Failure by the *AHJ* to provide the notification in Section Y1.2 does not release the *building owner* of the legal obligation to comply with this law.

Y2 BUILDING OWNER RESPONSE TO NOTIFICATIONS

Y2.1 Correction of errors. *Building owners* are responsible for reviewing the property and *building* information provided by the *AHJ* through notification including, but not limited to, *building* or *building complex* ownership details, *gross floor area*, and other information as identified by the *building owner*.

Y2.1.1 Correction of errors documentation. *Building owners* who are notified in error may submit a correction to the *AHJ*. The correction will be used to document *gross floor area* (conditioned and unconditioned) and/or *building type*.

Y3 OREGON STATE REPORTING REQUIREMENTS FOR TIER 2 BUILDING OWNERS

Y3.1 General compliance. The *building owner* of a *Tier 2 covered building* must provide data as specified in Forms A, B, and C to enable the *AHJ* to establish a benchmark for energy use in, and greenhouse gas emissions from, tier 2 buildings in accordance with the compliance schedule established under Section Y3.2. The *AHJ* shall cooperate with the Oregon Department of Education to establish a requirement to provide the data in a manner that minimizes costs to schools and avoids or minimizes duplication with the Department of Education's school facility assessments. The *AHJ* shall also coordinate, where practicable, with other jurisdictions in Oregon that have energy benchmarking policies to minimize duplication in reporting.

Y3.2 Compliance schedule. The *building owner* of a *Tier 2 covered building* must report the *information required by section Y4* to the *AHJ* not later than July 1, 2028 and by July 1 every five years thereafter. During the initial reporting period on July 1, 2028, the building owner must report, at a minimum, required data for complete calendar years 2026 and 2027. For subsequent reporting deadlines, the building owner must report complete data for all calendar years since the previous reporting period. Newly constructed buildings that become covered buildings during a reporting period shall report data for all months following certificate of occupancy.

Y4. DOCUMENTATION OF COMPLIANCE

Building owners must provide the following documentation to verify compliance with the benchmarking requirement.

1. Form A
2. Form B
3. Form C

Y5. VIOLATIONS, ASSESSMENT OF ADMINISTRATIVE PENALTIES AND REVIEW OF PENALTY DECISIONS

Not applicable for *Tier 2 covered buildings*.

Y6. COMPLIANCE FORMS

The following sections replace Standard 100, Normative Annex C, "Reporting Forms," and provide additional forms specified by rule. Building owners are required to submit the applicable forms and the required supporting information to demonstrate compliance with benchmarking requirements. These forms replace all referenced forms in this standard. The AHJ will make these forms available in an electronic format for submission to the AHJ.

Y6.1 Compliance with Energy Benchmarking Requirements (Form A)

1. Building identification:
 - a. Oregon state building ID
 - b. County
 - c. County parcel number(s)
 - d. Portfolio manager property ID number
 - e. Property name
 - f. Parent property name
 - g. Address 1 (street)
 - h. Address 2
 - i. City
 - j. State
 - k. Postal code
2. Contact information:
 - a. Building owner name(s)
 - b. Contact name
 - c. Address 1 (street)
 - d. Address 2
 - e. City
 - f. State/province
 - g. Country
 - h. Postal code
 - i. Telephone number
 - j. Email address
3. Qualified person: (if applicable)
 - a. Qualified person name
 - b. Address 1 (street)
 - c. Address 2
 - d. City
 - e. State
 - f. Postal code
 - g. Telephone number
 - h. Email address
 - i. Licensed, certified (select all that apply)
 - i. Licensure, or
 - ii. certifying authority
4. Qualified Energy manager (if applicable, if not the qualified person):
 - a. Qualified energy manager name
 - b. Address 1 (street)
 - c. Address 2
 - d. City
 - e. State/province
 - f. Postal code
 - g. Country
 - h. Telephone number
 - i. Email address

- j. Qualified Energy Manager certification number
- 5. Energy manager (if different than the qualified person or qualified energy manager):
 - a. Energy manager name
 - b. Address 1 (street)
 - c. Address 2
 - d. City
 - e. State/province
 - f. Postal code
 - g. Country
 - h. Telephone number
 - i. Email address
- 6. Summary data:
 - a. Energy use intensity target (EUI_t) (kBtu/ft²/yr) based on completed Section Y6.2 Form B;
Note: Buildings unable to develop EUI_t in accordance with Section 7.2.2 or 7.2.3 of this standard shall report national median site EUI target as calculated by the Energy Star portfolio manager account and reported on Form C.
 - b. Measured site EUI (kBtu/ft²) for the compliance year for this building based on Section Y6.3 Form C;
 - c. Measured weather normalized site EUI (kBtu/ft²) for the compliance year based on Section Y6.3 Form C;
 - d. List the months/year of the collected data (mm/yyyy - mm/yyyy) for the compliance year for this building from Section Y6.3 Form C;
 - e. Buildings unable to comply with Section 6.2, building energy monitoring, and complete Section Y6.3 Form C, shall provide a reason statement.

Y6.2 Building Activity and Energy Use Intensity Target (EUI_t) (Form B).

Complete form provided by the AHJ with the following information:

1. Building identification:
 - a. Oregon state building ID
 - b. County
 - c. County parcel number(s)
 - d. Portfolio manager property ID number
 - e. Property name
 - f. Parent property name
 - g. Address 1 (street)
 - h. Address 2
 - i. City
 - j. State
 - k. Postal code
2. List the building location Climate Zone, 4C or 5B. Determine the climate zone using the ASHRAE climate zone map located in Informative Annex G.
3. The gross floor area in square feet shall be reported as defined in Oregon State Buildings Performance Standard
4. If entire building is a nontarget building, a single building activity type not listed in Table 7-1, it should be listed as "building without target" on Section Y5.1 Form A. List "energy target" as "N/A" on Section Y6.2 Form B, and Section Y6.2 Form B is considered complete.
5. Fill in fraction of gross floor area (A)_i for each activity. For single-activity buildings this is 1.0.
6. Fill in the operating shifts normalization factor (S)_i from Table 7-3 for each activity.
7. Fill in the activity energy target (EUI_{t1})_i from Table 7-2 (or table from AHJ) for each activity.
8. Calculate weighted space EUI target (A × S × EUI_{t1})_i for each activity.
9. Add up fraction of floor area and enter sum in "Total fraction of floor area with target," and add up all weighted space EUI targets and enter sum as the "energy target" on Sections Y6.1 and Y6.2 Forms A and B.
10. If more than 50% of gross floor area has no target, it should be listed as "building without target". on Section Y6.1 Form A. List "energy target" as "N/A" on Section Y6.2 Form B. For single-activity buildings this is 1.0.

Y6.3 Energy use intensity calculations and energy benchmarking information (Form C).

Energy use intensity calculations and other building information for energy benchmarking shall be reported via the U.S. EPA's ENERGY STAR portfolio manager (www.energystar.gov/benchmark) unless otherwise approved by the AHJ. The *energy manager* is responsible for creating Energy Star portfolio manager record for each *building*.

Exception to Y5.3: *Buildings* unable to comply with Section 5.2, building energy monitoring shall demonstrate compliance at the *connected buildings* level.

The Energy Star portfolio manager building record shall be identical to the building activity/type, fraction floor area, operating shifts (hours of operation), and gross floor area of the building as reported on Form B. All inputs shall be up to date prior to reporting as required in Section Y3, and annually as required in Section 5.1.2.3.

Prior to submitting reports, run the Energy Star portfolio manager data quality checker and make all corrections required to complete the report.

The *energy manager* shall use the EPA's Energy Star portfolio manager share properties feature and share the property data with the *AHJ* by enabling the read-only access and exchange data feature.

For each report submitted under Section Y3, The *energy manager* shall create and submit a report documenting the required data fields listed (below) and other fields deemed necessary by the *AHJ* for the reporting period.

Report fields shall include the following:

- Portfolio manager property ID;
- Portfolio manager parent property ID;
- Property name;
- Parent property name;
- Address 1;
- Address 2;
- City;
- County;
- State/Province;
- Postal Code;
- Primary property type - Self-selected;
- Primary property type - EPA calculated;
- List of all property use types at property;
- Property GFA - Self-reported (ft²);
- Property GFA - EPA calculated (*buildings* and parking) (ft²);
- Property GFA - EPA calculated (*buildings*)(ft²);
- Property GFA - EPA calculated (parking)(ft²);
- Largest property use type;
- Largest property use type - *Gross floor area* (ft²);
- 2nd Largest property use type;
- 2nd Largest property use - *Gross floor area* (ft²);
- 3rd Largest property use type;
- 3rd Largest property use type - *Gross floor area* (ft²);
- Year built;
- Occupancy;
- Property notes;
- Property data administrator;
- Property data administrator - Email;
- Last modified date - Property;
- Last modified date - Electric meters;
- Last modified date - Gas meters;
- Last modified date - Nonelectric nongas energy meters;
- Local standard ID(s) Oregon state building standard;

- Data center - Energy estimates applied;
- Electricity use - Grid purchase and generated from on-site renewable systems (kWh);
- Electricity use - Grid purchase (kWh);
- Electricity use - Generated from on-site renewable systems and used on-site (kWh);
- Natural gas use (therms);
- Fuel oil #1 use (kBtu);
- Fuel oil #2 use (kBtu);
- Fuel oil #4 use (kBtu);
- Fuel oil #5 and #6 use (kBtu);
- Diesel #2 use (kBtu);
- Kerosene use (kBtu);
- Propane use (kBtu);
- District steam use (kBtu);
- District hot water use (kBtu);
- District chilled water use (kBtu);
- Coal - Anthracite use (kBtu);
- Coal - Bituminous use (kBtu);
- Coke use (kBtu);
- Wood use (kBtu);
- Other use (kBtu);
- Default values;
- Temporary values;
- Estimated data flag - Electricity (grid purchase);
- Estimated data flag - Natural gas;
- Alert - Data center does not have an IT meter;
- Alert - *Gross floor area* is 0 ft²;
- Alert - Property has no uses;
- Data quality checker - Date run;
- Data quality checker run - ?;
- Alert - Energy meter has less than 12 full calendar months of data;
- Alert - Energy meter has gaps;
- Alert - Energy meter has overlaps;
- Alert - Energy - No meters selected for metrics;
- Alert - Energy meter has single entry more than 65 days;
- Estimated values - Energy;
- Energy Star score;
- National median *site energy* use (kBtu);
- *Site energy* use (kBtu);
- *Site EUI* (kBtu/ft²);
- *Weather normalized site energy* use (kBtu);
- *Weather normalized site EUI* (kBtu/ft²);
- *Weather normalized site electricity* (kWh);
- *Weather normalized site electricity intensity* (kWh/ft²);
- *Weather normalized site natural gas use* (therms);
- *Weather normalized site natural gas intensity* (therms/ft²) energy current date;
- Electricity use - Generated from on-site renewable systems (kWh);
- Electricity use - Generated from on-site renewable systems and exported (kWh);
- Electricity Use - Grid purchase and generated from on-site renewable systems (kBtu);
- Electricity use - Grid purchase (kBtu);
- Electricity use - Generated from on-site renewable systems and used on site (kBtu);
- Natural gas use (kBtu);
- Percent of total electricity generated from on-site renewable systems;
- Cooling degree days (CDD) (°F);

- Heating degree days (HDD) (°F);
- Weather station name;
- Weather station ID.

Y6.4 Energy Audit Forms (Form D). Not applicable for *Tier 2 covered buildings*.

Y6.5 Normative Annex X, “Investment Criteria” Tool (Form F). Not applicable for *Tier 2 covered buildings*.

Y6.6 Documentation of a Building of Historic Significance (Form G). Not applicable for *Tier 2 covered buildings*.

Y6.7 Application for Exemption Certificate (Form H). Not applicable for *Tier 2 covered buildings*.

Y6.8 Grouped Buildings Compliance with Standard 100 (Form J). Not applicable for *Tier 2 covered buildings*.

Y7. Section 7—Tables as modified by Oregon state.

See Normative Annex Z Oregon State Reporting Requirements for:

- **Table 7-1 Building Activity Types/Activities**
- **Table 7-2a Building Activity Site Energy Targets (EUI_{t1}) (I-P Units)**
- **Table 7-3 Building Operating Shifts Normalization Factor**
- **Table 7-4 Building Activity Type Definitions Table**

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