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# ATTACHMENT 1

### **Questions for Party Consideration**

Parties are asked to consider and respond to the below questions .

Q1. Pacific Gas and Electric Company will be designated as the lead utility and fiscal sponsor of the development and implementation of the concurrent application process system (CAS). What is a reasonable budget amount to authorize for Senate Bill (SB) 1208 implementation?

Implementation will include, but may not be limited to, the following:

- Software development for a CAS that allows customers to concurrently apply, or begin to apply, to multiple customer assistance programs, at a minimum to include the Energy Savings Assistance (ESA), California Alternate Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) programs, and leverages design requirements from the Universal Application System (UAS) recommendations report as much as possible.<sup>1</sup> This includes integration with the large investor owned utilities' (IOUs) existing ESA/CARE/FERA enrollment processes, associated data flows, and updates to the existing enrollment systems to allow for seamless integration;
- Platform design and development with the scalability and flexibility for future development, such as integration with external program applications and leveraging other existing technologies to further reduce enrollment barriers and administrative burden;
- CAS data storage and management capabilities that adhere to applicable data security and privacy laws, both for regulated entities and regulators; and
- System testing, launch, and ongoing support and maintenance costs of the platform.

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<sup>1</sup> UAS Sub-Working Group Report, July 1, 2022:  
<https://pda.energydataweb.com/#!/documents/2626/view>.

Q2. What proportion of the total budget authorized for SB 1208 implementation should each IOU be allocated and authorized to collect?

Q3. Should the costs associated with the implementation of SB 1208 be funded, tracked, and recovered using the existing ESA balancing account or a new memorandum account?

Q4. The Universal Application System Working Group Report recommended ongoing stakeholder engagement in the design and development of the platform. Energy Division staff has identified a need for formal governance bodies in past information technology projects to adapt and update a system based on new needs and requirements. A governance body for CAS will be important since this platform is expected to expand.<sup>2</sup> Should a governance body be established to govern decisions on setting design requirements? Who should be included on the governance body? How should other stakeholders be included during the development process? What additional responsibilities should be part of the governance body?

Q5. In designing and implementing the CAS, what privacy and data sharing policies and concerns should be considered, particularly if a third-party is used to administer the CAS?

**(END OF ATTACHMENT 1)**

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<sup>2</sup> Expansion of CAS is expected given: (1) the intent of CAS provided in Section 1 of SB 1208 is to expand to additional CAPs; (2) the recommendations in the UAS Sub-Working Group Report included expansion and development of the platform in future phases; and (3) both SB 1208 and the UAS Working Group highlight integration opportunities beyond IOU-administered energy programs, including other CPUC and state agency energy, water, and telecommunications programs.