

R.19-01-011 COM/DH7/jnf



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03/26/25

03:30 PM

R1901011

**APPENDIX A**

Electric Utilities New Reporting Requirements Established by D.XX-XX-XXX

**A P P E N D I X A**

**Electric Utilities New Reporting Requirements Established by this Decision**

<b>Reporting Requirements per Section 5, Ordering Paragraphs 9, 17 and 19</b>			
<b>Reporting Requirement</b>	<b>Entities Responsible</b>	<b>Reporting Deadline</b>	<b>Reporting Format</b>
Final evaluation report for all non-isolating devices that have been approved, not approved, or for which the evaluation has ceased.	Electric utilities and suppliers	No later than 60 days after the evaluation process of the device has concluded.	Informational filing to the service lists of R.19-01-011 and R.19-09-009 and Energy Division at <a href="mailto:energydivisioncentralfiles@cpuc.ca.gov">energydivisioncentralfiles@cpuc.ca.gov</a>
Progress on evaluation activities for the last reporting period and expected evaluation activities for the upcoming reporting period (see Section 5.3.3 for further detail).	Electric utilities	For 2025 and 2026 calendar years, every 3 months starting April 15, 2025. Starting 2027, annually on January 15, until funds have been fully expended.	Tier 1 Advice Letter
Response to the questions posed in Section 5.2.3 about peak demand data.	Electric utilities	Within 90 days of the passage of this decision	Tier 1 Advice Letter

The following information is added to Resolution E-5105 reporting requirements, all of which shall be submitted via an informational Tier 1 Advice Letter by April 15, 2026, and annually each April 15 thereafter. This reporting requirement shall automatically sunset after the last report following exhaustion of the authorized funds for service line upsizing. Electric utilities may request a copy of the reporting requirement below in csv format from Energy Division staff.

<b>Reporting Requirements per Section 4.3, Ordering Paragraphs 6, 7 and 28 for Common Facility Cost Treatment</b>		
<b>Instructions and Definitions Tab:</b>		
<b>General Notes</b>	<p>This annual data reporting is required per D.23-12-037, Ordering Paragraph 8, in the Building Decarbonization proceeding R.19-01-011. Compliance deadline for all data reporting is April 15 annually. The date required in this spreadsheet shall be included with the reporting requirements established under Resolution E-5105 of the same proceeding. This reporting requirement shall automatically sunset after the last report following exhaustion of the authorized funds for service line upsizing or after the fourth report on April 15, 2030, whichever comes first.</p>	
<b>Definitions</b>	Under-resourced customer	<p>The definition of an under-resourced customer shall be by reference to the program that the customer is participating in, and will thus differ from program to program. If a customer is a participant of any under-resourced, low income, or equity-based program, or combination of programs, as a result of which the customer's premise undergoes full electrification and capping of prior gas service, then that customer shall be considered an under-resourced customer. These programs may include, but are not limited to The Equitable Building Decarbonization program, the HEEHRA program, the TECH Initiative, the ESA program, etc. Please refer to Section 4.3 of today's decision for full context.</p>

<b>Reporting Requirements per Section 4.3, Ordering Paragraphs 6, 7 and 28 for Common Facility Cost Treatment</b>		
<b>Instructions and Definitions Tab:</b>		
	Program	A Program means any collective public service initiative including but not limited to those overseen, managed, or led by utilities, Community Choice Aggregators (CCAs), local governments, Regional Energy Networks (RENs), state or federal agencies, non-profit organizations, or community-based organizations, with the general purpose of making a positive impact towards reducing climate change caused from building energy use. These would typically include, but are not limited to, initiatives that support building electrification or fuel substitution, distributed renewable generation and onsite storage, and building electric efficiency. Gas efficiency programs do not qualify as an eligible Program under this definition.
	Multifamily	Any premise <b>with two or more</b> dwelling units shall be considered multifamily for this reporting
	Small business	Any business with less than 25 employees shall be considered a small business
	Service Point Climate Zone	Use <b>CEC Climate Zones</b> , same as what was required in Resolution E-5105 reporting
	USPS-standardized Service Address	An address that has been standardized to United States Postal Service address format. See <a href="https://postalpro.usps.com/address-quality">https://postalpro.usps.com/address-quality</a>

<b>Reporting Requirements per Section 4.3, Ordering Paragraphs 6, 7 and 28 for Common Facility Cost Treatment</b>		
<b>Instructions and Definitions Tab:</b>		
	Project Identifier (project ID #)	As reported in compliance reporting required under CPUC Energization proceeding: R.24-01-018
	Meter ID#	Unique number assigned to every utility meter. This field shall only be reported in the confidential version sent to CPUC staff via secure file transfer

<b>Individual Premise Information</b>	
<b>Reporting Field</b>	<b>Example Text</b>
USPS-Standardized Service Address	1234 JEFFERSON CT SACRAMENTO CA 95691-4882
Meter ID# (Confidential version only)	123456789
Project Identifier # (project ID #) (see instructions)	
Service Address Climate Zone	12
Initial Application Submittal Date	3/14/2025
Application Approval Date	4/30/2025
Site work Completion date	6/4/2025
Service Restart date	6/20/2025
Utility existing service capacity (at the time of initial application) (amp)	60
Customer existing electrical panel capacity (at the time of initial application)	60
Utility Installed Electrical Service Capacity	200
Customer Installed electrical panel capacity	200
Were full utility costs ratebased? Y/N	Y
Is customer a participant of any income-based electrification program? Y/N	Y
Name of Program/s that the customer has participated in for electrification	Equitable Building Decarbonization Direct Install
Year the customer enrolled in program (if participant in more than one program, provide the last enrolled)	2025
Has the premise fully electrified after service upsizing? Y/N	Y
Premise Type: Small Business, Single Family or Multifamily	Single Family
Ratebased Utility costs (\$s)	\$8,343.00
Customer-paid Utility Costs (\$s)	\$0.00

<b>Individual Premise Information</b>	
<b>Reporting Field</b>	<b>Example Text</b>
If applicable, was project denied ratebasing of utility costs (i.e. estimated utility costs exceeded \$10,000) Y/N/NA	NA
Reason/s that made the project costs > \$10,000, if applicable	E.g. 1NA E.g. 2 Existing Overground lines were undergrounded E.g. 3 Unexpected trenching costs due to Bedrock/soil condition/(utilities can create categories for commonly occurring conditions in their territory)
Measure1 that triggered the need for service upsizing, as noted in application (e.g. solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	HVAC
Measure2 that triggered the need for service upsizing, as noted in application (e.g. solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	Water Heater
Measure3 that triggered the need for service upsizing, as noted in application (e.g. solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	Electric Cooktop
Measure4 that triggered the need for service upsizing, as noted in application (e.g. solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	NA
Measure5 that triggered the need for service upsizing, as noted in application (e.g. solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	NA

<b>Individual Premise Information</b>	
<b>Reporting Field</b>	<b>Example Text</b>
Measure6 that triggered the need for service upsizing, as noted in application (e.g. solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	NA
Did the customer consider (self-attestation) alternates to service upsizing such as smart splitters, power control devices, Meter Socket Adapters, and alternative load calculation methods? Y/N	Y



**(END OF APPENDIX A)**