



**FILED**

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A2503009

**BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA**

Application of Southern California  
Edison Company (U338E) for  
Authorization to Recover Costs  
Related to NextGen Enterprise  
Resource Planning Program.

Application 25-03-009

**ASSIGNED COMMISSIONER'S SCOPING MEMO AND RULING**

This scoping memo and ruling sets forth the issues, need for hearing, schedule, category, and other matters necessary to scope this proceeding pursuant to Public Utilities (Pub. Util.) Code Section 1701.1 and Article 7 of the Commission's Rules of Practice and Procedure (Rules).

**1. Procedural Background**

On March 14, 2025, Southern California Edison Company (SCE) filed Application 25-03-009, seeking funding to replace its Enterprise Resource Planning (ERP) system, a software system that helps SCE manage its critical day-to-day business operations, because its current ERP system will soon be obsolete.

A prehearing conference was held on May 14, 2025, to address the issues of law and fact, determine the need for hearing, set the schedule for resolving the matter, and address other matters as necessary. After considering the protests, SCE's reply, the report on the meet and confer of parties, and the discussion at the prehearing conference, I have determined the issues and proceeding schedule to be as set forth in this scoping memo. I have also determined that no environmental and social justice issues have been raised at this time.

## **2. Issues**

The issues to be determined or otherwise considered in this proceeding are:

1. What are the quantified and qualified forecasted benefits and costs for the NextGen ERP program? Are these forecasted benefits and costs just and reasonable?
2. Is SCE's proposed implementation for the NextGen ERP program reasonable?
3. What, if any, forecasts and ratemaking proposals should the California Public Utilities Commission (Commission or CPUC) authorize for the NextGen ERP program?
  - a. What amounts of forecasted expenses, forecasted capital expenditures, and revenue requirement for the NextGen ERP program are just and reasonable and should be authorized for recovery in rates?
  - b. Should the NextGen ERP Program Balancing Account (ERPBA) be authorized? If so, what is the appropriate ratemaking mechanism for the ERPBA which, among other things, ensures that costs recorded in the account are incremental to those authorized or will be authorized in SCE's General Rate Cases?
  - c. Should the Commission grant SCE a ratemaking mechanism for costs SCE incurred for the NextGen ERP program above authorized spending? If so, what is the appropriate ratemaking mechanism for costs incurred above authorized spending?
  - d. Should the Commission address SCE's requested NextGen ERP SAP Memorandum Account (NGESMA) and the 2024 recorded costs in the NGESMA in this proceeding?
4. Should SCE be required to report incurred and forecasted costs and benefits of the NextGen ERP program? If so, how should this reporting be done?

### **3. Need for Evidentiary Hearing**

The above issues are contested, material issues of fact. Accordingly, we will allow parties to present evidence on these issues. Evidentiary hearings are needed.

### **4. Schedule**

The following schedule is adopted here and may be modified by the Administrative Law Judge (ALJ) as required to promote the efficient and fair resolution of the application:

<b>EVENT</b>	<b>DATE</b>
SCE's Workshop on the ERP CPUC San Francisco Office Courtyard Room 505 Van Ness Ave San Francisco, CA 94102 <u>View-only Webex:</u> Webinar Number: 2480 631 8218 Password: AVf36fp2wxJ	May 30, 2025
Intervenors' testimony served	September 15, 2025
Rebuttal testimony served	October 20, 2025
Report of the Meet and Confer	November 5, 2025
Evidentiary Hearings (5 days) CPUC San Francisco Office 505 Van Ness Ave San Francisco, CA 94102	December 1-5, 2025
Opening briefs filed	January 14, 2026
Reply briefs filed	February 13, 2026
Proposed decision	2nd Quarter 2026

Pursuant to Rule 13.9, the parties shall meet and confer no later than 10 calendar days after the submission of rebuttal testimony. The purpose of the

meet and confer is to ascertain whether the parties stipulate to the receipt of prepared testimony into evidence without direct or cross examination or whether an evidentiary hearing is still needed. After the meet and confer, SCE, on behalf of the parties, shall file and serve a Report of the Meet and Confer by November 5, 2025, identifying agreements reached and unresolved issues requiring hearing.

The proceeding will stand submitted upon the filing of reply briefs, unless the ALJ requires further evidence or argument. Based on this schedule, the proceeding will be resolved within 18 months as required by Pub. Util. Code Section 1701.5.

## **5. Alternative Dispute Resolution Program and Settlements**

The Commission's Alternative Dispute Resolution (ADR) program offers mediation, early neutral evaluation, and facilitation services, and uses ALJs who have been trained as neutrals. At the parties' request, the assigned ALJ can refer this proceeding to the Commission's ADR Coordinator. Additional ADR information is available on the Commission's website.<sup>1</sup>

Any settlement between parties, whether regarding all or some of the issues, shall comply with Article 12 of the Commission's Rules of Practice and Procedure and shall be served in writing. Such settlements shall include a complete explanation of the settlement and a complete explanation of why it is reasonable in light of the whole record, consistent with the law, and in the public interest. The proposing parties bear the burden of proof as to whether the settlement should be adopted by the Commission.

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<sup>1</sup> <https://www.cpuc.ca.gov/PUC/adr/>.

**6. Category of Proceeding and  
Ex Parte Restrictions**

This ruling confirms the Commission's preliminary determination<sup>2</sup> that this is a ratesetting proceeding. Accordingly, *ex parte* communications are restricted and must be reported pursuant to Article 8 of the Commission's Rules of Practice and Procedure.

**7. Public Outreach**

Pursuant to Pub. Util. Code Section 1711(a), where feasible and appropriate, before determining the scope of the proceeding, the Commission sought the participation of those likely to be affected, including those likely to derive benefit from, and those potentially subject to, a decision in this proceeding. This matter was noticed on the Commission's daily calendar. Where feasible and appropriate, this matter was incorporated into engagements conducted by the Commission's External Affairs Division with local governments and other interested parties.

**8. Intervenor Compensation**

Pursuant to Pub. Util. Code Section 1804(a)(1), a customer who intends to seek an award of compensation must file and serve a notice of intent to claim compensation by June 13, 2025, 30 days after the prehearing conference.

**9. Response to Public Comments**

Parties may, but are not required to, respond to written comments received from the public. Parties may do so by posting such response using the "Add Public Comment" button on the "Public Comment" tab of the online docket card for the proceeding.

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<sup>2</sup> Resolution ALJ 176-3562 at 1.

## **10. Public Advisor**

Any person interested in participating in this proceeding who is unfamiliar with the Commission's procedures or has questions about the electronic filing procedures is encouraged to obtain more information at <https://www.cpuc.ca.gov/about-cpuc/divisions/news-and-public-information-office/public-advisors-office>, contact the Commission's Public Advisor at 866-849-8390 or 866-836-7825 (TTY), or send an email to [public.advisor@cpuc.ca.gov](mailto:public.advisor@cpuc.ca.gov).

## **11. Filing, Service, and Service List**

The official service list has been created and is on the Commission's website. Parties should confirm that their information on the service list is correct and serve notice of any errors on the Commission's Process office, the service list, and the ALJ. Persons may become a party pursuant to Rule 1.4.<sup>3</sup>

When serving any document, each party must ensure that it is using the current official service list on the Commission's website.

This proceeding will follow the electronic service protocol set forth in Rule 1.10. All parties to this proceeding shall serve documents and pleadings using electronic mail, whenever possible, transmitted no later than 5:00 p.m., on the date scheduled for service to occur. Rule 1.10 requires service on the ALJ of both an electronic and a paper copy of filed or served documents, unless the ALJ orders otherwise. The assigned ALJ has provided specific instructions as to the service of filed or served documents at the prehearing conference.<sup>4</sup>

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<sup>3</sup> The form to request additions and changes to the Service list may be found at: <https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/administrative-law-judge-division/documents/additiontoservicelisttranscriptordercompliant.pdf>.

<sup>4</sup> At the prehearing conference, the assigned ALJ requested two paper copies of any testimony served and one paper copy of any document filed that is over 20 pages.

When serving documents on Commissioners or their personal advisors, whether or not they are on the official service list, parties must only provide electronic service. Parties must not send hard copies of documents to Commissioners or their personal advisors unless specifically instructed to do so.

Persons who are not parties but wish to receive electronic service of documents filed in the proceeding may contact the Process Office at [process\\_office@cpuc.ca.gov](mailto:process_office@cpuc.ca.gov) to request addition to the “Information Only” category of the official service list pursuant to Rule 1.9(f).

The Commission encourages those who seek information-only status on the service list to consider the Commission’s subscription service as an alternative. The subscription service sends individual notifications to each subscriber of formal e-filings tendered and accepted by the Commission. Notices sent through subscription service are less likely to be flagged by spam or other filters. Notifications can be for a specific proceeding, a range of documents and daily or weekly digests.

## **12. Receiving Electronic Service from the Commission**

Parties and other persons on the service list are advised that it is the responsibility of each person or entity on the service list for Commission proceedings to ensure their ability to receive emails from the Commission. Please add “@cpuc.ca.gov” to your email safe sender list and update your email screening practices, settings and filters to ensure receipt of emails from the Commission.

## **13. Assignment of Proceeding**

Karen Douglas is the assigned Commissioner and Elaine Lau is the assigned ALJ and presiding officer for the proceeding.

**IT IS RULED** that:

1. The scope of this proceeding is described above and is adopted.
2. The schedule of this proceeding is set forth above and is adopted.
3. An evidentiary hearing is needed.
4. The presiding officer is Administrative Law Judge Elaine Lau.
5. The category of the proceeding is ratesetting.

Dated June 5, 2025, at San Francisco, California.

/s/ KAREN DOUGLAS

Karen Douglas  
Assigned Commissioner