



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

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Application of Pacific Gas and Electric Company  
for Approval of Its Billing Modernization Initiative

Application No. 24-10-014  
(Filed October 23, 2024)

(U 39 M)

**PACIFIC GAS AND ELECTRIC COMPANY'S (U 39 M)  
SECOND JOINT CASE MANAGEMENT STATEMENT**

MARJORIE KENNEDY  
RICHARD STEPANOVIC

Jenner & Block, LLP  
353 North Clark Street  
Chicago, IL 60654  
Telephone: (312) 222-9350  
Facsimile: (312) 527-0484  
Email: [kennedy@jenner.com](mailto:kennedy@jenner.com)  
[rstepanovic@jenner.com](mailto:rstepanovic@jenner.com)

AARON J. LEWIS

Pacific Gas and Electric Company  
300 Lakeside Drive, Suite 210  
Law Department, 19th Floor  
Oakland, CA 94612  
Telephone: (530) 400-9136  
Facsimile: (510) 898-9696  
Email: [Aaron.Lewis2@pge.com](mailto:Aaron.Lewis2@pge.com)

Attorneys for:  
PACIFIC GAS AND ELECTRIC COMPANY

Dated: January 30, 2026

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**I. INTRODUCTION**

Pursuant to Rule 7.2(a) of the California Public Utilities Commission’s Rules of Practice and Procedure, and the March 27, 2025 Assigned Commissioner’s *Scoping Memo and Ruling* (Scoping Memo), Pacific Gas and Electric Company (PG&E) submits this Joint Case Management Statement. PG&E makes this filing on behalf of PG&E, the Public Advocates Office at the California Public Utilities Commission (Cal Advocates), The Utility Reform Network (TURN), Small Business Utility Advocates (SBUA), Peninsula Clean Energy Authority, Ava Community Energy, Central Coast Community Energy, the City and County of San Francisco, acting by and through its Public Utilities Commission, Marin Clean Energy, City of San José, Silicon Valley Clean Energy, and Sonoma Clean Power Authority (collectively, the Joint CCAs), and leapfrog Power, Inc (Leapfrog).<sup>1/</sup> The parties met and conferred on August 14, 2025, September 5, 2025, and January 14, 2026.

**II. CASE MANAGEMENT STATEMENT ISSUES**

**A. Stipulated Facts**

The parties stipulate to the following facts:

- PG&E’s current billing systems (legacy billing systems) consists of multiple systems, including Oracle Customer Care and Billing (CC&B), a

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<sup>1/</sup> Pursuant to Rule 1.8(d), PG&E is authorized to file this Joint Case Management Statement on behalf of the parties listed in this paragraph.

modular rate engine called Advanced Billing System (ABS), and a Landis+Gyr Meter Data Management System (MDMS).

- CC&B was first implemented in 2001 and was last updated in 2017.
  - ABS was developed in-house at PG&E in the 1990s.
  - The Landis+Gyr MDMS was implemented in 2006.
- Oracle continues to provide sustaining support for CC&B version 2.4.
  - CCAs rely on PG&E, as the statutorily designated billing agent for CCAs in its service territory, to generate and issue bills for their customers and to collect and transfer CCA customer payments to CCAs.
  - CCAs cannot directly make changes to CCA-specific messaging in the “swim lane” on customer bills; CCAs must request that those changes be made through PG&E and those changes are subject to PG&E approval. CCAs retain the ability to tailor “on-bill messaging” content tied to their charge data, which allows for customer-specific language to be reflected within the bill’s charge details section.
  - Currently, more than half of PG&E’s customers are unbundled customers and receive service from CCAs.
  - PG&E’s current billing system has constraints that impact the flexibility, visibility, and timeliness of certain features available to unbundled customers, particularly with regard to bill messaging, usage data presentation, and third-party system integrations.
  - PG&E’s Commission-approved common cost methodology allocates common costs across all of PG&E’s functions.

## **B. Status of Settlement Negotiations**

The parties met on August 14, 2025, September 5, 2025, and January 14, 2026 to discuss a potential settlement of this proceeding. PG&E and the Joint CCAs have separately met regularly in ongoing settlement negotiations. No settlement agreements have been reached to

date. As a result, the issues within the scope of this proceeding identified in Section 2 of the Scoping Memo remain unresolved. The parties will be ready to discuss at the status conference the parties' resources, readiness for the hearing, and estimates of time requested for cross-examination and identification of anticipated final exhibits as directed by the Scoping Memo and Ruling. As stated in the Proposed Witness Schedule submitted by PG&E on January 30, 2026, the parties anticipate that three hearing days will likely be sufficient for evidentiary hearings in this proceeding.

### **C. List of Disputed Facts**

The disputed material facts requiring an evidentiary hearing are listed below, along with an explanation of the party/parties requesting an evidentiary hearing and why these facts could not be elicited through data requests or another format and estimates of the amount of time needed to address each disputed material fact. Note that while PG&E and CalAdvocates each dispute issues, neither currently identifies any disputed material facts that require an evidentiary hearing.

#### **1. Joint CCAs' List of Disputed Facts:**

- Whether PG&E's BMI upgrades will enable the billing presentment changes the Joint CCAs recommend.
  - Parties seeking evidentiary hearing on this issue: Joint CCAs.
  - Explanation of why hearing is necessary: The Joint CCAs are actively working to conduct discovery to determine whether this issue can be resolved without hearings. At the time of this Joint Case Management Statement, the Joint CCAs do not yet have the additional information they need to determine whether hearings can be waived. The Joint CCAs therefore respectfully request that the Commission grant hearings on this issue to ensure there is a venue to further elucidate issues surrounding this disputed fact.
  - Amount of time sought: 30 minutes.

- Whether PG&E's BMI upgrades will better facilitate communications between CCAs and their customers as compared to PG&E's current system.
  - Parties seeking evidentiary hearing on this issue: Joint CCAs.
  - Explanation of why hearing is necessary: The Joint CCAs are actively working to conduct discovery to determine whether this issue can be resolved without hearings. At the time of this Joint Case Management Statement, the Joint CCAs do not yet have the additional information they need to determine whether hearings can be waived. The Joint CCAs therefore respectfully request that the Commission grant hearings on this issue to ensure there is a venue to further elucidate issues surrounding this disputed fact.
  - Amount of time sought: 30 minutes.
- Whether PG&E's current billing system constraints are anti-competitive or a disadvantage to CCAs and their customers.
  - Parties seeking evidentiary hearing on this issue: Joint CCAs.
  - Explanation of why hearing is necessary: The Joint CCAs are actively working to conduct discovery to determine whether this issue can be resolved without hearings. At the time of this Joint Case Management Statement, the Joint CCAs do not yet have the additional information they need to determine whether hearings can be waived. The Joint CCAs therefore respectfully request that the Commission grant hearings on this issue to ensure there is a venue to further elucidate issues surrounding this disputed fact.
  - Amount of time sought: 30 minutes.
- Whether the IT costs that PG&E currently allocates to all functions through its common cost methodology are comparable to the proposed BMI costs.

- Parties seeking evidentiary hearing on this issue: Joint CCAs.
- Explanation of why hearing is necessary: The Joint CCAs are actively working to conduct discovery to determine whether this issue can be resolved without hearings. At the time of this Joint Case Management Statement, the Joint CCAs do not yet have the additional information they need to determine whether hearings can be waived. The Joint CCAs therefore respectfully request that the Commission grant hearings on this issue to ensure there is a venue to further elucidate issues surrounding this disputed fact.
- Amount of time sought: 30 minutes.
- Whether the common cost methodology set forth in PG&E’s Application is different than its existing common cost methodology.
  - Parties seeking evidentiary hearing on this issue: Joint CCAs.
  - Explanation of why hearing is necessary: The Joint CCAs are actively working to conduct discovery to determine whether this issue can be resolved without hearings. At the time of this Joint Case Management Statement, the Joint CCAs do not yet have the additional information they need to determine whether hearings can be waived. The Joint CCAs therefore respectfully request that the Commission grant hearings on this issue to ensure there is a venue to further elucidate issues surrounding this disputed fact.
  - Amount of time sought: 30 minutes.
- Whether PG&E could have taken actions between 2017-2024 to mitigate the need for the CC&B 25.1 upgrade as an interim measure.
  - Parties seeking evidentiary hearing on this issue: Joint CCAs, TURN, SBUA

- Explanation of why hearing is necessary: The Joint CCAs are actively working to conduct discovery to determine whether this issue can be resolved without hearings. At the time of this Joint Case Management Statement, the Joint CCAs do not yet have the additional information they need to determine whether hearings can be waived. The Joint CCAs therefore respectfully request that the Commission grant hearings on this issue to ensure there is a venue to further elucidate issues surrounding this disputed fact.
- Amount of time sought: 60 minutes.
- Whether PG&E's BMI upgrades will resolve persistent issues with billing data quality and data exchange processes between PG&E and CCAs in its service territory.
  - Parties seeking evidentiary hearing on this issue: Joint CCAs.
  - Explanation of why hearing is necessary: The Joint CCAs are actively working to conduct discovery to determine whether this issue can be resolved without hearings. At the time of this Joint Case Management Statement, the Joint CCAs do not yet have the additional information they need to determine whether hearings can be waived. The Joint CCAs therefore respectfully request that the Commission grant hearings on this issue to ensure there is a venue to further elucidate issues surrounding this disputed fact.
  - Amount of time sought: 30 minutes.
- Whether PG&E can estimate the impacts of its proposed BMI upgrades on CCA service fees.
  - Parties seeking evidentiary hearing on this issue: Joint CCAs.
  - Explanation of why hearing is necessary: The Joint CCAs are actively working to conduct discovery to determine whether this issue can be

resolved without hearings. At the time of this Joint Case Management Statement, the Joint CCAs do not yet have the additional information they need to determine whether hearings can be waived. The Joint CCAs therefore respectfully request that the Commission grant hearings on this issue to ensure there is a venue to further elucidate issues surrounding this disputed fact.

- Amount of time sought: 30 minutes.

**2. TURN's List of Disputed Facts:**

- Whether PG&E's GRC application only addressed the "beginning of the upgrade process," and whether PG&E indicated this in its GRC application
  - Parties seeking evidentiary hearing on this issue: TURN.
  - Explanation of why hearing is necessary: This is a critical and material disputed fact. It is also complex and interrelated with many other facts, as well as potentially requiring numerous follow-up questions to present a full picture. This makes discovery a poor mechanism for addressing this disputed factual issue.
  - Amount of time sought: 90 minutes.
- Whether the benefits proposed in the 2023 GRC could be obtained at the cost proposed by PG&E.
  - Parties seeking evidentiary hearing on this issue: TURN, SBUA.
  - Explanation of why hearing is necessary: PG&E argues that the benefits it proposed in the 2023 GRC application could not have been obtained at the cost proposed by PG&E. Since this was contained in PG&E testimony and sponsored by a witness under oath, evidentiary hearings is necessary for this issue for potential impeachment. Cross examination for impeachment cannot be accomplished by the discovery process.

- Amount of time sought: 105 minutes.
- Whether PG&E's application represents a drastic increase in costs, and whether the increased costs would have likely occurred if the Commission had approved PG&E's GRC application, as PG&E asserts.
  - Parties seeking evidentiary hearing on this issue: TURN.
  - Explanation of why hearing is necessary: This is a critical and material disputed fact. It is also complex and interrelated with many other facts, as well as potentially requiring numerous follow-up questions to present a full picture. This makes discovery a poor mechanism for addressing this disputed factual issue.
  - Amount of time sought: 90 minutes.

### **3. SBUA's List of Disputed Facts**

- Whether PG&E's application demonstrates that the scoping and implementation of the CC&B 25.1 and C2M projects adequately control for completion and cost-overflow risks.
  - Parties seeking evidentiary hearing on this issue: SBUA.
  - Explanation of why hearing is necessary: This is a critical and material disputed fact. SBUA has submitted discovery on this issue without satisfactory response.
  - Amount of time sought: 90 minutes.
- Whether PG&E has justified its contingency request.
  - Parties seeking evidentiary hearing on this issue: SBUA.
  - Explanation of why hearing is necessary: This is a critical and material disputed fact. SBUA has submitted discovery on this issue without satisfactory response.
  - Amount of time sought: 30 minutes.

- Whether PG&E has sufficiently considered the requirements to integrate the multitude edge systems that are impacted by its proposed billing system updates.
  - Parties seeking evidentiary hearing on this issue: SBUA.
  - Explanation of why hearing is necessary: This is a critical and material disputed fact. SBUA has submitted discovery on this issue without satisfactory response.
  - Amount of time sought: 45 minutes.
- Whether PG&E project scope has sufficiently considered the bill-related needs of small business customers.
  - Parties seeking evidentiary hearing on this issue: SBUA.
  - Explanation of why hearing is necessary: This is a critical and material disputed fact. SBUA has submitted discovery on this issue without satisfactory response.
  - Amount of time sought: 30 minutes.

### **III. CONCLUSION**

The parties appreciate the opportunity to provide an update on the status of this proceeding and will provide updates on the status of settlement negotiations as necessary.

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Respectfully Submitted,

AARON J. LEWIS

By:           /s/Aaron J. Lewis            
AARON J. LEWIS

Pacific Gas and Electric Company  
300 Lakeside Drive, Suite 210  
Law Department, 19th Floor  
Oakland, CA 94612  
Telephone: (530) 400-9316  
Facsimile: (510) 898-9696  
E-Mail: [Aaron.Lewis2@pge.com](mailto:Aaron.Lewis2@pge.com)

Attorney for  
PACIFIC GAS AND ELECTRIC COMPANY

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