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BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

Application of Southern California Edison Company (U338E) for Approval of its 2027 ERRA Forecast Proceeding Revenue Requirement.	Application 26-05-006
Application of Southern California Edison Company (U338E) regarding energy resource recovery account trigger mechanism; Expedited treatment requested.	Application 26-09-019

ASSIGNED COMMISSIONER'S AMENDED SCOPING MEMO AND RULING

This Amended Scoping Memo and Ruling consolidates Application (A.) 26-05-006 and A.26-09-019. The scope of the consolidated proceeding is modified to consider the issues raised in A.26-09-019. Evidentiary hearing is not needed, and the schedule of the consolidated proceeding will align with the existing schedule for A.26-05-006. This Amended Scoping Memo affirms the category and other matters necessary to scope this proceeding pursuant to Public Utilities Code Section 1701.1 and Article 7 of the Commission's Rules of Practice and Procedure (Rules).

1. Background

1.1. Procedural Background for A.26-05-006

On May 15, 2026, Southern California Edison Company (Applicant or SCE) filed Application (A.) 26-05-006 seeking approval of its 2027 Energy Resource Recovery Account (ERRA) forecast. On June 17, 2026, the California Community

Choice Association (CalCCA) and the Public Advocates Office at the California Public Utilities Commission (Cal Advocates) timely filed and served protests to the Application, and the Direct Access Customer Coalition (DACC) filed and served a timely response. On June 29, 2026, SCE timely filed and served a reply to the protests and response.

On July 13, 2026, the Prehearing Conference (PHC) for A.26-05-006 was held.

On July 22, 2026, the Scoping Memo and Ruling for A.26-05-006 was issued.

On October 5, 2026, an ALJ email ruling took notice of the submission of A.26-09-019, SCE's ERRA Trigger application. In the ruling, the ALJ noted that SCE proposed resolving A.26-09-019 by the end of 2026, using a similar schedule set in A.26-05-006. Given the concurrent timing and the overlapping issues in the two proceedings, the Commission directed SCE to incorporate all analysis related to the ERRA Trigger application in its October Update in A.26-05-006. In addition, the Commission directed parties to address any matters from the ERRA Trigger application in comments and/or briefs for the ERRA Forecast proceeding.

On October 15, 2026, SCE served its October Update, including analysis related to the ERRA Trigger application.

1.2. Procedural Background for A.26-09-019

On September 30, 2026, SCE filed A.26-09-019, its ERRA Trigger application.

On October 12, 2026, CalCCA filed and served a response to A.26-09-019, and Cal Advocates filed and served a motion for party status.

On October 13, 2026, SCE filed and served a reply to CalCCA's response, and Cal Advocates' motion for party status was granted.

On October 16, 2026, a joint prehearing conference statement was filed and served.

On October 19, 2026, the PHC for A.26-09-019 was held. At the PHC, SCE, CalCCA, and Cal Advocates expressed a preference for consolidating the ERRA Forecast and ERRA Trigger applications.[1]

2. Consolidation

After considering the ERRA Forecast and ERRA Trigger applications and the discussion at the prehearing conference, I have determined that consolidating A.26-05-006 and A.26-09-019 is reasonable given the overlap of issues and timing. The schedule of the consolidated proceeding will align with the existing ERRA Forecast proceeding schedule.

3. Issues

The issues to be determined or otherwise considered are:

1. Whether SCE's requested 2027 ERRA forecast revenue requirement is reasonable, including but not limited to consideration of the following:
    a. SCE's forecast of electric sales and electric load;
    b. SCE's forecast of costs for fuel and purchased power expenses (F&PP);
    c. SCE's forecast of greenhouse gas (GHG) costs; and
    d. SCE's true-ups for certain memorandum accounts (MAs) and balancing accounts (BAs), including but not limited to consideration of the following:
        i. 2026 ERRA Balancing Account (ERRA BA) year-end balance;

[1] Cal Advocates noted it was equally open to holding A.26-09-019 in abeyance or consolidating.

ii. 2026 Portfolio Allocation Balancing Account (PABA) year-end balance;

iii. 2026 New System Generation Balancing Account (NSGBA) year-end balance;

iv. 2026 Modified Cost Allocation Mechanism Balancing Account (MCAMBA) year-end balance;

v. 2026 Tree Mortality Non-Bypassable Charge Balancing Account (TMNBCBA) year-end balance;

vi. 2026 Bioenergy Market Adjusting Tariff (BioMAT) Non-Bypassable Charge Balancing Account (BMNBCBA) year-end balance;

vii. 2026 Energy Settlements Memorandum Account (ESMA) year-end balance; and

viii. 2026 Litigation Costs Tracking Account (LCTA) year-end balance.

2. Whether SCE's forecast of GHG allowance revenue return allocations for energy-intensive trade-exposed customers, small business customers, and the residential customer California Climate Credit is reasonable;
3. Whether SCE's forecast of GHG revenues and expenses set aside for (a) clean energy and energy efficiency programs and GHG program administration and (b) customer education and outreach plan costs are reasonable;
4. Whether the Cost Allocation Mechanism rates are reasonable;
5. Whether SCE's forecast of Central Procurement Entity (CPE) related costs is reasonable;
6. Whether SCE's calculations of the Power Charge Indifference Adjustment (PCIA) and Competition Transition Charge (CTC) are reasonable, including discussion of the following:
    a. Treatment of resource adequacy (RA) resources and associated costs in the PCIA;

b. Treatment of Renewable Portfolio Standard (RPS) resources, including usage order, with excess RPS value and allocation of RPS sales across vintages;

c. Calculation of the indifference amount;

d. Impact of PABA; and

e. Allocation of indifference charges across vintages and customer classes;

7. Whether SCE's requests and methods used to determine the issues described above comply with all applicable rules, regulations, and decisions for all customer categories;

8. Whether SCE's trigger request was reasonable and complied with Commission orders, including D.02-10- 062, D.04-12-048, D.06-06-051, D.19-12-001, and D.22-01-023.

9. Other related matters.

4. Need for Evidentiary Hearing

Parties indicated that an evidentiary hearing is not needed in this proceeding.[2]

5. 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:

Event	Date
Comments on October Update & Concurrent Opening Briefs	October 29, 2026
Concurrent Reply Briefs	November 5, 2026
Proposed Decision	No later than November 24, 2026

[2] Joint Case Management Statement at 2 (A.26-05-006; September 15, 2026); Joint PHC statement at 3 (A.26-09-019; October 16, 2026).

Comments on Proposed Decision[3]	*+10 days following mailing date of PD*
Replies to Comments on Proposed Decision	*+5 days following date Opening Comments are due*
Final Commission Decision	December 17, 2026

For the Comments on the October Update, Opening Briefs, and Reply Briefs, parties shall state whether arguments on contested issues raised earlier in the proceeding are no longer applicable and the issue no longer contested, whether due to the October Update or for other reason(s).

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 by December 17, 2026, allowing SCE to make rate changes on January 1, 2027.[4]

6. Alternative Dispute Resolution (ADR) 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.[5]

Any settlement between parties, whether regarding all or some of the issues, shall comply with Article 12 of the Rules and shall be served in writing. Such settlements shall include a complete explanation of the settlement and a

[3] At the A.26-05-006 PHC, Cal Advocates, CalCCA, DACC, and SCE stipulated to a 10-day comment period.

[4] A.26-05-006 at 10-11.

[5] https://www.cpuc.ca.gov/PUC/adr/

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.

7. Category of Proceeding and Ex Parte Restrictions

This ruling confirms the Commission's preliminary determinations[6] that this is a ratesetting proceeding. Accordingly, ex parte communications are restricted and must be reported pursuant to Article 8 of the Rules.

8. Intervenor Compensation

Pursuant to Public Utilities 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 November 18, 2026, 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.

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 http://cpuc.ca.gov/pao or contact the Commission's Public Advisor at 866-849-8390 or send an e-mail to public.advisor@cpuc.ca.gov.

[6] Resolution ALJ-176-3582; Assigned Commissioner's Ruling at 3 (A.26-09-019; October 2, 2026).

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.[7]

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, with one exception, such that all parties are excused from the Rule 1.10 requirement to serve on the ALJs both an electronic and a paper copy of filed or serviced documents. Therefore, when serving documents on Commissioners, their personal advisors, and the ALJ, parties must only provide electronic service, unless otherwise instructed by the ALJ. 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.

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 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 accepted by the Commission. Notices sent through

[7] 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

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

Matthew Baker is the assigned commissioner, and Brandon Gerstle is the assigned ALJ Scoping.

IT IS RULED that:

1. Application 26-05-006 and Application A.26-09-019 are consolidated.
2. The scope of this proceeding is described above and is adopted.
3. The schedule of this proceeding is set forth above and is adopted.
4. Evidentiary hearing is not needed.
5. The category of the proceeding is ratesetting.
6. The assigned Commissioner or assigned Administrative Law Judge may modify the schedule, as required to promote the efficient and fair resolution of the proceeding.

Dated October 27, 2026, at San Francisco, California.

/s/ MATTHEW BAKER
Matthew Baker
Assigned Commissioner