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

**ENERGY DIVISION AGENDA ID: 19594**

 **RESOLUTION E-5152**

 **August 5, 2021**

**RESOLUTION**

E-5152. Approval of the Database for Energy-Efficiency Resources updates for Program Year 2023 and revised version for Program Years 2022 and 2021.

PROPOSED OUTCOME:

* DEER2023 Update (effective January 1, 2023)
* Revise DEER2022 Update (effective January 1, 2022)
* Revise DEER2021 Update (effective 2021)

SAFETY CONSIDERATIONS:

* There are no safety considerations associated with this resolution.

ESTIMATED COST:

There are no costs associated with this resolution.

By Energy Division’s own motion in Compliance with D.15-10-028.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# SUMMARY

This Resolution approves updates to the Database for Energy-Efficient Resources (DEER) for program year (PY) 2023 and a revised version of DEER for PY2022 and PY2021, in Compliance with D.15-10-028, D.21-05-031,[[1]](#footnote-2) and Resolutions E-4818, E-4952, E-5009, and E-5082. This update also addresses significant transitions for the DEER and workpaper system maintenance and operation.

All updated DEER assumptions, methods, values and supporting documentation are available on the DEEResources.com website.[[2]](#footnote-3)

# BACKGROUND

## The Database for Energy Efficient Resources (DEER) contains information on energy-efficient technologies and measures. DEER provides estimates of the energy-savings potential for these technologies in residential and nonresidential applications. DEER is used by California Energy Efficiency (EE) Program Administrators (PAs), private sector implementers, and the EE industry across the country to develop and design energy efficiency programs.

The DEER database has a 30-year history, starting in the 1990s under the California Energy Commission (CEC) where responsibility for developing energy efficiency measure parameters was delegated to a broad stakeholder coalition. With the 2006-08 energy-efficiency (EE) portfolio cycle, the CPUC Energy Division took control of the DEER and began hosting it on the “Deeresources” suite of websites.

## **Relevant Regulatory Background**

The California Public Utilities Commission (Commission or CPUC) Decision D.15-10-028, Ordering Paragraph 17 states: “Commission staff shall propose changes to the Database of Energy Efficient Resources once annually via Resolution, with the associated comment/protest period provided by General Order 96-B. However, Commission staff may make changes at any time without a Resolution to fix errors or to change documentation.” D.15-10-028, retains the direction from D.12-05-015 that DEER values be updated for consistency with existing and updated state and federal codes and standards while incorporating these changes into the DEER update.[[3]](#footnote-4) D.21-05-031 retains previous direction regarding CPUC staff latitude in updating DEER.[[4]](#footnote-5)
D.21-05-031 adopts a biennial update schedule for DEER, eliminates the DEER and non-DEER distinction for EE measures and redefines the scope of the DEER resolution to:

 a) lock down the version of ex ante EE values used for planning and claims; b) direct research to inform future DEER updates; and c) manage deemed ex ante processes.

Resolution E-5082 initiated the transition of existing DEER and workpaper systems DEER and workpaper systems to a software platform jointly co-funded by the IOUs called the Electronic Technical Resource Manual (eTRM)[[5]](#footnote-6) and conferred conditional designation “data source of record” to the eTRM.[[6]](#footnote-7) Resolution E-5082 also outlined a schedule and benchmarks for the phased transition from DEER to the eTRM as the new “data source of record” for energy savings values for energy efficiency measures.

In addition, Resolution E‑4952[[7]](#footnote-8) (DEER2020), adopted on October 11, 2018, clarified and specified issues in Resolution E‑4818,[[8]](#footnote-9) adopted on March 2, 2017. Among other things, these resolutions ordered a large number of significant changes including guidance on the peak demand period, building prototypes, and measure analysis software control (MASControl3) updates.

## **Timing and Applicability of DEER Updates**

DEER updates flow into the EE portfolio development process by providing new energy savings estimates and other EE measure parameter updates for program design. New energy savings estimates, and underlying assumptions, methods, and values inform the direction of current energy efficiency programs. These allow program administrators to shift program eligibility requirements and incentive support mechanisms to deliver the most reliable, cost-effective energy savings. DEER updates may also reflect new market conditions. PAs are required to ensure new assumptions and values are incorporated into EE programs by a) knowing there is an update, b) understanding the fundamental assumptions for the update, and c) identifying necessary shifts to their programs to capture cost-effective savings. Updates to DEER methods apply to EE technical workpaper development and custom project energy savings estimates as well as program delivery decisions.

The terminology “DEERxxxx” is used to designate the version of updated parameters and is independent of the conversion to using eTRM. The year shown reflects the program year that a given update takes effect. Beginning January 1, 2022 DEER will no longer refer to the ExAnte and Preliminary Ex Ante Review (PEAR) databases since these data will reside in the eTRM.

## **Final Priority Topic Area Updates for DEER2023 and Revised DEER2022**

On March 30, 2021, a DEER Update Scoping Document, which list the possible topic areas for the annual update, was issued for public comment. Nine stakeholders, including all four investor owned utilities (IOUs), submitted comments on the DEER Update Scoping Document.[[9]](#footnote-10) Below are the issues raised most frequently in the comments:

* Transition to electronic Technical Reference Manual (eTRM)
* Clarification of workpaper processes and responsibilities
* Moving toward EnergyPlus™-based building prototypes
* Proposed fieldname changes to reduce reporting errors
* Emphasis on GWP of refrigerants
* Need for multifamily centralized water heater system measures

The final list of topic areas being addressed in this DEER update is summarized in Table 1. The policy guidance for these updates is described in the Discussion section that follows. A more detailed technical description of the changes and additions is provided in Attachment A to this Resolution. Complete documentation and supporting material on the updated assumptions and methods and updated DEER elements such as database tables, calculators, and web pages are available at [DEEResources.com](http://DEEResources.com).[[10]](#footnote-11)

Table 1. DEER2023 Update Measures

|  |  |  |  | Sector | Measure/Tech Group | Forecasted Value |
| --- | --- | --- | --- | --- | --- | --- |
| Priority | Effort | DEER Version |  | Res | Non-Res | Lighting | HVAC | DHW | Envelope | Plug/Process | UES | NTG | EUL | Measure Cost | Other |
| Update Topic Area |
|  |  |  | Transition to eTRM |  |  |  |  |  |  |  |  |  |  |  |  |
| !!!! | $$$$ | 2023 | Further clarification of eTRM Transition Plan, Phases 2 and 3 | X | X | X | X | X | X | X | X | X | X | X | X |
|  |  |  | DEER Update Cycle Revisions |  |  |  |  |  |  |  |  |  |  |  |  |
| !!!! | $$ | 2023 | Clarification of revised DEER update scope/ schedule and revisions to workpaper processes | X | X | X | X | X | X | X | X | X | X | X | X |
|  |  |  | DEER Methodology Updates |  |  |  |  |  |  |  |  |  |  |  |  |
| !!!! | $$$$ | 2024-2026 | Migration of DEER prototypes to EnergyPlus™ | X | X | X | X | X | X | X | X |  |  |  |  |
| !!!! | $$$ | 2023-2024 | Update simulation weather files to CZ2022 | X | X | X | X | X | X |  | X |  |  |  |  |
| !!!! | $$$ | 2023 | Peak demand period definition update | X | X | X | X | X | X | X | X |  |  |  |  |
| !!!! | $$ | 2023 | Modifications to allow new load shape sources | X | X | X | X | X | X | X |  |  |  |  | X |
| !!! | $ | 2023 | Measure cost methodology and documentation guidance | X | X | X | X | X | X | X |  |  |  | X |  |
| !!! | $ | 2023 | Refrigerant avoided costs fields added | X | X |  | X | X |  |  |  |  |  |  | X |
| !!! | $ | 2023 | Expire all refrigerant charge adjustment measures | X | X |  | X |  |  |  | X |  |  |  |  |
| !! | $ | 2023 | Clarify add-on equipment approach to EUL | X | X |  | X | X |  |  |  |  | X |  |  |
| !! | $ | 2023 | Deemed GSIA table updates | X | X |  | X | X |  |  |  |  | X |  |  |
| ! | $ | 2021 | Custom measure usage of deemed values |  | X | X | X | X | X | X | X |  |  | X |  |
| ! | $ | 2023 | Revisions to fieldnames for baseline clarity | X | X | X | X | X | X | X | X |  |  |  |  |
|  |  |  | DEER Error Corrections |  |  |  |  |  |  |  |  |  |  |  |  |
| !!! | $$ | 2021 | DEER water heater calculator corrections for commercial buildings |  | X |  |  | X |  |  | X |  |  |  |  |
| !!! | $$ | 2021 | Commercial tankless water heater measure extensions |  | X |  |  | X |  |  | X |  |  |  |  |
| !!! | $ | 2023 | Water-cooled chiller measure tier definitions |  | X |  | X |  |  |  | X |  |  |  |  |
| !!! | $ | 2020 | Residential duct sealing measure missing some energy impacts  | X |  |  | X |  |  |  | X |  |  |  |  |
| !!! | $ | 2021 | Residential duct sealing measures normalizing unit modification | X |  |  | X |  |  |  | X |  |  |  |  |
| !!! | $ | 2021 | Residential duct sealing GSIA values expiration | X |  |  |  | X |  |  |  |  |  |  | X |
| !!! | $ | 2021 | Refrigerator/freezer measures normalizing unit correction | X | X |  |  |  |  | X | X |  |  |  |  |
| !!! | $ | 2020 | Fuel substitution default NTG applicability clarification | X | X |  | X | X |  |  |  | X |  |  |  |
| !! | $$ | 2023 | Align residential clothes washer measures with ENERGY STAR tiers | X |  |  |  |  |  | X | X |  |  |  |  |
| !! | $$ | 2023 | Align residential dishwasher measures with ENERGY STAR tiers | X |  |  |  |  |  | X | X |  |  |  |  |
| !! | $$ | 2023 | Whole-house fan measure updates | X |  |  | X |  |  |  | X |  |  |  |  |
| !!! | $ | 2022 | Residential gas furnace fan efficiency revision | X |  |  | X |  |  |  | X |  |  |  |  |
| !! | $$ | n/a | LED commercial lighting measure clarification |  | X | X |  |  |  |  |  |  |  |  |  |
| !! | $ | 2023 | Update applicability of hard-to-reach NTG IDs | X | X | X | X | X | X | X |  | X |  |  |  |
|  |  |  | Review of EM&V\* Studies |  |  |  |  |  |  |  |  |  |  |  |  |
| !!! | $ | TBD | Upstream/midstream program tracking data guidance | X | X | X | X | X | X | X |  |  |  |  | X |
| !!! | $$$ | 2022-2023 | Updates per residential 2019 EM&V | X |  |  | X | X |  | X | X | X |  |  |  |
| !!! | $$ | 2023 | Updates per nonresidential lighting 2019 EM&V |  | X | X |  |  |  |  | X | X |  | XU |  |
| !! | $$$ | 2023 | Updates per HVAC sector 2019 EM&V | X | X |  | X |  |  |  | X | X |  |  |  |
| !! | $$ | 2023 | Updates per small\medium commercial 2019 EM&V |  | X |  |  | X |  | X | X | X |  |  |  |
|  |  |  | Review of Codes & Standards |  |  |  |  |  |  |  |  |  |  |  |  |
| !!!! | $$ | 2023 | Federal standards for commercial natural-gas packaged boilers | X | X |  | X |  |  |  | X |  |  |  |  |
| !!! | $$ | 2023 | Residential gas furnace measures revised baseline | X |  |  | X |  |  |  | X |  |  | X |  |
| !! | $ | 2022 | New low-GWP refrigerant standards | X | X |  | X | X |  |  | X |  |  |  |  |
| !!! | $$$ | 2023 | CEC Title 24 building efficiency updates | X | X |  | X |  |  |  | X |  |  |  |  |
| !!! | $$$ | 2022 | CEC Title 20 appliance efficiency updates | X | X |  |  | X |  | X | X |  |  |  |  |
|  |  |  | Review of Market and Research Studies |  |  |  |  |  |  |  |  |  |  |  |  |
| !!! | $$ | 2023 | Update EULs based on Group A EUL study | X | X |  |  |  |  |  |  |  | X |  |  |
|  |  |  | New Measure Additions |  |  |  |  |  |  |  |  |  |  |  |  |
| !! | $$ | 2023 | Commercial tankless water heater |  | X |  |  | X |  |  | X |  |  |  |  |
| !!! | $$$$ | 2023-2024 | Multifamily central water heating systems | X | X |  |  | X |  |  | X |  |  |  |  |

\*Evaluation, Measurement & Verification

# DISCUSSION

Pursuant to D.15‑10‑28, the Energy Division published a DEER Update Scoping Document on the proposed list of updates for DEER2023 and revised DEER2022 and DEER2021 items on March 30, 2021. The list of topic areas that this Resolution will incorporate are summarized below and described in detail in Attachment A, DEER2023 Update Summary.

### **Transition to Electronic Technical Reference Manual (eTRM)**

#### As stated above, the DEER systems will fully transition to a new platform, the eTRM, by 2022. This resolution adopts further guidance to ensure a transparent and seamless transition.

The eTRM was developed in response to the IOUs’ consolidation of territory-specific EE measures into a set of statewide workpapers, or EE measure offerings that share the same value tables across all IOU territories. The effort was conducted under the auspices of the California Technical Forum (Cal TF) and funded by the IOUs and the State’s two large publicly-owned utilities Sacramento Municipal Utility District (SMUD) and Los Angeles Department of Water and Power (LADWP). During this consolidation effort the ExAnte database (EAdb) tables and Ex Ante Database Archive (deeresource.net) file directory were standardized into the eTRM relational database format and made accessible through an online user interface. In addition, the Workpaper Project Archive (WPA section of deeresources.info) began to transition to the eTRM user interface for submission of workpapers in 2021. CPUC website deeresources.com will not be affected at this time.

Energy Division staff assessed the eTRM and determined that with certain additional enhancements the eTRM will be equipped to replace DEEResources.net as the source for current and future measure packages and the Remote Ex Ante Data Interface (READI) application as the source for public access to CPUC-approved deemed measure data.

#### A.1 Updates to Terminology

Starting with this Resolution, the following term is updated for improved consistency with the eTRM framework:

* “measure package” replaces the term “workpaper”

The definition is as follows:

*The “measure package” (formally referred to as “workpaper”) is the energy efficiency measure documentation that is needed to make a deemed energy efficiency claim. This includes but is not limited to: a narrative which describes the baseline and energy efficient case features of the energy saving technology, describes the methodologies to estimate energy impacts and incremental measure costs, provides citations and links to references and other supporting documentation, provides unit savings calculations and values for all combinations of the technology specific parameters*.

#### A.2 Designation as Data Source of Record

The eTRM was adopted as Data Source of Record in Resolution E-5082 conditional on CPUC staff’s determination that Phase 1 requirements in Appendix A, Table A-3 have been completed to staff’s satisfaction, effective January 1, 2021. Resolution E-5082 listed the requirements that the eTRM needed to meet[[11]](#footnote-12) to receive the designation as a CPUC-approved energy efficiency data source of record. Phase 1 enhancements[[12]](#footnote-13) and requirements[[13]](#footnote-14) focused on meeting the Energy Division’s deemed data specification along with a direct link that synchs nightly to the Energy Division’s support tables stored in the DEER database. The intent is to ensure that Program Administrators, measure developers and non-PA program implementers accessed all relevant data through the eTRM, as it had been previously accessed through deeresources.net and the READI application. This resolution acknowledges that the Phase 1 requirements have been met and that the IOUs, as well as the public, may reference the eTRM in formal measure development and documentation, portfolio forecasting, and reporting claims. We direct CPUC staff to redirect the deeresources.net site to the eTRM. Content currently stored in deeresources.net continues to be maintained as a repository for archived workpapers and will be phased out at a future date. The eTRM is the source of EE measure information approved for EE planning and reporting for PY2021 and beyond.

Phase 2 requirements adopted in Resolution E-5082 are underway and progressing according to staff’s revised schedule.[[14]](#footnote-15),[[15]](#footnote-16)

#### A.3 Continuation of Development Activity into 2022

Resolution E-5082 Appendix 1[[16]](#footnote-17) states that Phase 2 work would be completed in Q3 2021, and authorized staff to make adjustments to the timeline as project development needs arose. In coordination with the IOUs, CalTF and the eTRM project management team, CPUC staff assessed the list of enhancements in E-5082 versus priorities to meet the needs of a data source of record. These modifications have not changed the objectives adopted in E-5082; instead, they enable more efficient versioning and data structures to support measure development and review. We have adjusted the Phase 2 development timeline by extending it into 2022 so the working group can address new enhancement priorities and testing needs.

#### A.4 IOU Budgets for 2022 eTRM and CalTF Support

In Resolution E-5082, we directed the IOUs to file a tier 1 advice letter identifying their 2021 budgets for eTRM development support. In this Resolution, we direct the IOUs to include budgets for eTRM development and CalTF support of new measure development needs in their 2022-23 Annual Budget Advice Letter filings, with a short description and table illustrating the proposed budgets in the narrative so that staff can understand and approve the budgets along with the other forecasted activities for 2022. The activities directed by this resolution are listed in Appendix 1. Consistent with
E-5082 direction, the IOUs may use either program or EM&V funds for the eTRM activities but not exceed e EE portfolio budget caps as ordered in D. 18-05-041 to fund the eTRM development.[[17]](#footnote-18) IOUs shall identify the funding sources for eTRM and CalTF in their 2022-2023 ABAL filings.

#### A.5 Ownership and Financial Responsibility of eTRM 2022 and Beyond

Ultimately, the eTRM will become an integrated part of the California Energy Data and Reporting System (CEDARS) when the Energy Division receives authorization by the California Department of Technology for the appropriate IT procurement activities. The IOUs may pass financial responsibility for ongoing eTRM maintenance and development to the CPUC when the CPUC’s IT procured contracts to fund and support the platform are underway in 2022. At this point, the Energy Division will own and manage the eTRM indefinitely. The Energy Division will discuss necessary revenue agreements in 2021 to facilitate the financial issues concerning joint ownership with the POUs and possibly other state agencies in the future.

### **DEER Update Cycle Revisions**

#### B.1 Changes due to Decision D.21-05-031

Decision D.21-05-031[[18]](#footnote-19) makes several changes that affect the DEER Resolution update. It delegates CPUC to make future updates to the DEER and measure package submittal, review, and approval processes via the resolution, removes the DEER versus non-DEER distinction for deemed ex ante values, and revises the scope of the DEER Resolution. The new scope of the resolution will encompass:

* approval of deemed ex ante values
* direction of research needs
* management of deemed ex ante value process
* adoption of a locked, two-year version of deemed values to be used in forecasting, portfolio planning, and savings claims

It further changes the DEER Resolution date from September 1 to November 1 and to be issued in even years rather than every year.

In addition, the decision directs that “current processes in Table 2 will be replaced with new processes developed in the DEER resolution process. Commission staff will continuously manage this process, including instituting the necessary changes, through the DEER resolution process from now on.”[[19]](#footnote-20) Current processes for any items not addressed in this Resolution shall remain unchanged.

These changes are further detailed in the sections below. We clarify that the direction and timeline adopted in this Resolution may be updated in subsequent resolutions as needs and resources change over time.

Table 2. Summary of Changes to Measure Package Submission, Review, Approval, and Effective Dates

| Item | Reference | Relevant Section(s) |
| --- | --- | --- |
| Changes in DEER – January 1 deadline for updates  | D.15-10-028 at 84 | B.2, B.3 |
| New/updates to measures that do more than just update values to conform with revised DEER values - May come in at any time or on first and third Monday, respectively | D.15-10-028 at 84 | B.2, B.4 |
| Measure package review “clock”  | D.15-10-028 at 103 | B.2, B.5, B.6 |
| Measure package submissions  | D.15-10-028 at 103 | B.2, B.4, B.5, B.6 |
| Interim approval | D.12-05-015 at 334 | B.5 |
| Dispute resolution  | D.12-05-015 at 335 | Not addressed in this resolution |
| Annual measure package submittal plan – October submittal | D.15-10-028 at 103 | B.2. B.3 |

Source: D.21-05-031

#### B.2 Changes to DEER Cycle Timeline

D.21-05-031 delegated to the DEER Resolution the management of submission, review, and approval of deemed ex ante values process, including the schedule for measure package submissions.

This DEER2023 Resolution (PY2023) establishes the transition from the annual DEER cycle to the new two-year cycle which starts with the DEER2024 Resolution (PY2024-25). Therefore, this is the last resolution under the annual update process with updates effective PY2023.[[20]](#footnote-21) For PY2023 measure packages, PAs shall make necessary adjustments to savings estimates based on research and modeling and submit the measure packages for CPUC staff review and approval.

In compliance with the new process, the DEER2024 will be the first Resolution to fully meet D.21-05-031 and lock in values to be used for planning and claims for PY2024-25. Per the new process, this Resolution directs PAs to update and make necessary adjustments to savings estimates based on research and modeling and submit the measure packages for CPUC staff review and approval. Staff-approved values are then presented in the draft DEER2024 Resolution for adoption. Adopted values will remain locked for planning and claims in PY2024-25. PAs may still submit new measures during the cycle, but ex ante values adopted in DEER2024 will remain locked.

Finally, this Resolution sets forth the modified processes and schedule for submission of measure packages for CPUC staff approval. A summary of the schedule is provided in Table 3. Additional detail is provided in the sections that follow.

Table 3. DEER Update Cycle Transition Timeline

| Program Year(s) | Description | Responsible Party | Due Date | Approval Date | Effective Date |
| --- | --- | --- | --- | --- | --- |
| 2023 | Draft DEER2023 Update Resolution | CPUC | 2021-06-01 | - | - |
|  | DEER2023 Update Resolution | CPUC | - | 2021-09-01(expected) | 2023-01-01\* |
|  | Measure Package Update Schedule | PAs/Stakeholders | 2021-10-01\*\* | - | - |
|  | Measure Package Submittals | PAs | 2022-03-01 | 2022-10-03\*\*\* | 2023-01-01 |
| 2024-25 | Scoping Document | CPUC | 2022-05-01 | - | - |
|  | Measure Package Update Schedule | PAs/Stakeholders | 2022-03-01 | - | - |
|  | Measure Package Submittals | PAs | 2022-06-01 | 2022-08-01+ | 2024-01-01 |
|  | Draft DEER2024-25 Update Resolution | CPUC | 2022-08-01 | - | - |
|  | DEER2024-25 Update Resolution | CPUC | - | 2022-11-01(expected) | 2024-01-01\* |

\* There may be exceptions when updates become effective one year earlier.

\*\* Date shown or 30 days following the adoption of DEER2023 Resolution, whichever is later.

\*\*\* Date approval needed to meet the 90-Day Delay of Effective Start Date.

+ Per draft Resolution release, final approval once Resolution adopted

#### **B.3 Changes to Measure Package Update Schedule**

The schedule for measure package updates for the coming years is provided in Table 4 and is further detailed in the sections below. These updates result from the adoption of CZ2022 weather data (see Section C.2), concurrent time-of-use (TOU) changes (Section C.3), final results from the 2019 Residential Appliance Saturation Study (RASS) conducted by the California Energy Commission, and EM&V results.

Table 4. Schedule for Measure Package Updates PY2023 and PY2024-25

| Program Year, Effective Date | Sector | Update Detail | Data Availability | Relevant Section(s) in this Resolution | Estimated Number of Measure Packages | Measure Package Submittal Deadline |
| --- | --- | --- | --- | --- | --- | --- |
| PY2023,2023-01-01 | Non-Res. | Weather-dependent measures only | Weather data currently available | C.2, C.3 | 59 | 2022-03-01 |
|  | Res. | Non-weather-dependent measures – RASS only | Weather and RASS data currently available | C.1 | 40 | 2022-03-01 |
| PY2024-25,2024-01-01 | Res. | Weather-dependent measures – RASS and new prototypes | February 2022 for updated prototypes | C.1, C.2, C.3 | 47(2 MFm+) | 2022-06-01 |
|  | Res. & Non-Res. | EM&V results from 2022 | March 2022 for draft results | I  | 10\* | 2022-06-01 |

\* Specific list per EM&V plans expected July 2021 – see Section B.6 for additional detail

+ MFm is the DEER abbreviation for multifamily residences

#### **B.3.1 Measure Package Update Schedule for PY2023**

CPUC staff will work with PAs to set a prioritized schedule of updates for all PY2023 measure packages as indicated in Table 4. All updated measure packages must be submitted by March 1, 2022. No measure package revisions will be accepted after this date for PY2023.

#### **B.3.2 Measure Package Update Schedule for PY2024-25**

CPUC staff will work with PAs to set a prioritized schedule of updates for all PY2024-25 measure packages resulting from updates shown in Table 4. Only measure packages adopted in the DEER2024 will be included in the set of deemed measures for the PY2024-25 program cycle. The last day to submit measure packages for consideration in the 2024-25 vintage of deemed values will be June 1, 2022 to be approved for the DEER2024 Resolution on November 1, 2022.

CPUC staff will work with the PAs to develop a schedule of submissions so controversial measure packages are submitted well before the standard three-month timeframe for review and approval to avoid delays. It is the responsibility of the PAs to follow the agreed schedule for submissions or risk measure packages not being included in the DEER resolution and therefore not receiving approval.

#### B.4 Changes to Measure Package Submittal, Review, and Approval Process

We adopt the following modified rules for measure package submittal, review, and approval.

#### B.4.1 Submittal of Updated Measure Packages (PY2023 and beyond)

#### Measure packages updated in accordance with the schedule outlined in B.3 will be submitted, reviewed, and approved on a rolling basis and will have effective start dates in accordance with Section B.5.B.4.2 Submittal of New Measure Packages, New Measures Added to Existing Measure Packages, and Remaining Updates for PY2022

1. All new measure package submissions, independent of the exact time submitted, will be considered to have been submitted on the first or third Monday of the month; measure packages actually submitted after the close of business of the first Monday will be considered submitted on the third Monday and measure packages submitted after the close of business of the third Monday will be considered submitted on the first Monday of the following month. This will be herein considered the “original submittal date.”
2. PAs will be required to submit a measure package plan (previously workpaper plan) (MPP) for review and approval prior to a *new* measure package submission. In addition, CPUC may require MPPs for select measure package revisions. Furthermore, PAs requesting feedback from CPUC on in-development measures packages must submit a MPP.
3. CPUC has a 15-day (calendar) preliminary review period following the original submittal date to identify any additional information necessary to support approval of the measure package. In this event, CPUC will post a request for information which will stop the review clock. If no request for information is posted, CPUC has an additional 20-day (calendar) detailed review period to conduct the review and issue an approval or rejection.
4. Upon receipt of a measure package resubmission with all necessary information, CPUC has a 35-day (calendar) review period which starts on the day of the measure package resubmission date. If the CPUC does not issue a disposition by the end of the 35-day review period, a measure package will achieve interim approval.
5. In certain instances, for example, when a large batch of measure packages are submitted in quick succession or management approval of a complex measure package is needed, CPUC may request additional time to review or to conduct Senior Management review. CPUC will provide notice to PA if additional time is necessary to review measure packages.

#### B.5 Changes to Measure Package Effective Start Date

Measure packages updated in accordance with the schedule outlined in B.3 are subject to the effective start date as outlined in Table 3.2) New measure packages and updates to existing measure packages that solely include the addition of new measures are effective the day after approval.

*B.6 EM&V and DEER updates*

**As part of the Transition process, this Resolution, DEER2023, instructs PAs to work with CPUC staff to determine EM&V results being released in the 2022 EM&V bus stop that affect DEER measures.** Close coordination may be necessary due to the compressed timeline during transition period and to ensure EM&V studies finalized in 2022 are considered for the DEER2024 adoption.

**The DEER2024 will provide direction for prospective research to inform updates to specific measures to be considered for adoption in the DEER2026 and beyond.**

D.21-05-031 does not make changes to the annual EM&V bus stops adopted in D15-10-028. We believe this is an opportunity to improve scope and allocation of EM&V funds to include not only retrospective evaluations but also prospective research that supports DEER updates. We therefore direct staff to consider both retrospective and prospective research needs when assessing annual EM&V priorities.

### **DEER Methodology Updates**

DEER methodology updates affect the methods and approaches used to generate measures savings and supporting energy savings parameters, such as net-to-gross (NTG), effective useful life (EUL), unit energy savings (UES), and incremental measure costs (IMC). An update to DEER methodology could alter the savings values, database structure, building prototype models, or the use of DEER database table contents in measures. The changes for this cycle include launching a feasibility study to explore transitioning from the current eQUEST™/DOE2™-based building prototypes to EnergyPlus™ prototypes, updating weather files and associated peak demand period, accounting for avoided costs of refrigerants, along with other guidance and clarifications.

#### C.1 Feasibility Study for Transitioning to EnergyPlus™

**CPUC staff will conduct a feasibility study to assess the options for transitioning to an EnergyPlus-based system and away from the current eQUEST/DOE2-based system.** From our ongoing analysis of the 2019 RASS data and other updates considered for the existing deemed building prototype system, it was clear that a forward-focused, significant overhaul of the existing system is needed rather than incremental modification and streamlining as described in the DEER Scoping Document.[[21]](#footnote-22)

2019 RASS data based updates, including any measure assumptions based on previous RASS values of unit energy consumption (UEC) or number of installed units, should be incorporated into measure updates for PY2023. Updates to residential weather dependent measures that require prototype updates based on RASS data will be delayed to PY2024 so the weather and prototype based updates can be combined.

#### C.2 Update Simulation Weather Files to CZ2022

**Simulated and weather-dependent deemed measures will be updated using CZ2022 weather data for PY2023.** New weather files (CZ2022) were created using a 20-year period from 1998 through 2017. The California Energy Commission (CEC) will be adopting new time dependent valuation (TDV) costs and the CZ2022 weather data for the 2022 Title 24 update, effective January 1, 2023, so in order to align with the CEC, weather-dependent deemed measures will be updated using CZ2022 weather data, with updated deemed savings values effective for program year PY2023. As discussed in Section B.3, residential weather dependent measure updates will be delayed to PY2024 so prototype updates, if completed, can be combined with the weather updates. A new DEER field will be added to indicate the weather file used to determine unit energy savings, added energy loads, and associated load shapes.

#### C.3 Peak Demand Period Definition Update

**Peak demand days for each climate zone are updated per CZ2022 weather data and must be used to determine kW savings whenever CZ2022 is used.** For the peak kW consumption to be accurately calculated, the peak demand period dates need to be updated to align with the new building simulation weather files. In about half the climate zones, the month during which the peak days occur has shifted, but not consistently in either direction.

#### C.4 Modifications to Allow New Load Shape Sources

New sources of generalized load shape parameters will be considered for measures when they originate either from impact evaluations or studies conducted to support measures or they are produced through simulation results that employ advanced metering infrastructure (AMI) analysis. These new generalized load shape parameter submissions will be reviewed through the measure package review process and—if accepted—included as candidates for processing into avoided cost combos for program year 2023 and beyond, see Section B for changes to the measure review process.

#### C.5 Measure Cost Methodology and Documentation Guidance

**The DEER2023 update expires out-of-date values and revises the fields contained within the measure cost tables to align with the eTRM transition.** The DEER2023 update also clarifies the following to ensure the gross incremental measure costs are aligned: measures with the same standard/code baseline equipment use the same baseline costs; accelerated replacement costs are defined; fuel substitution labor costs are accounted for; and guidance for excluding non-energy costs.

#### C.6 Refrigerant Avoided Costs

**The reporting of refrigerant leakage avoided costs is required for PY2022 claims and enabled by the refrigerant avoided cost calculator.** Documentation of the refrigerant avoided cost inputs and a copy of the refrigerant avoided cost calculator are required for all measure packages involving equipment that contains refrigerant. PAs updates resulting from this new requirement will be addressed through an addendum to each affected measure package and will need to be submitted by December 1, 2021. New refrigerant avoided cost fields will need to be added to the eTRM permutations.

#### C.7 Expiring All Refrigerant Charge Adjustment Measures

**The DEER2023 update expires all deemed refrigerant charge adjustment measures as of December 31, 2022.** This action is taken based on the recommendations of a study, “A Roadmap for Accelerating the Adoption of Low-Global Warming Potential HVAC Refrigerants.”[[22]](#footnote-23)

#### C.8 Clarify Add-on Equipment Approach to EUL

**This resolution allows increasing the EUL of the host equipment to an add-on measure where the add-on measure is not installed directly on the host equipment.** The Add-On Equipment (AOE) definition states that the EUL of the add-on equipment measures is capped at the RUL of the host equipment. While the default RUL of all equipment is set at one-third the EUL, D.12-05-015, at 347, grants leeway when “further study results are available to establish more accurate values.”

#### C.9 Clarify Approach to DEER GSIA Table Updates

**The DEER2023 Update will create a new installation rate table and update the Gross Savings and Installation Rate Adjustment (GSIA) installation rate values stored in the table**.[[23]](#footnote-24)

#### C.10 Custom Measure Usage of Deemed Values

**Deemed measures can be processed through the custom programs as long as the deemed savings values are used and deemed rebates amounts are not exceeded.** Deemed measures may sometimes be processed through custom programs to simplify the application process for a customer’s convenience and to avoid multiple applications. Custom projects that include deemed measures, however, are required to use deemed values for energy savings and cost assumptions. In the past, some deemed measures were reported as custom projects in order to increase the rebate amounts.

#### C.11 Revisions to Fieldnames for Baseline Clarity

**We require the CEDARS, CET, and eTRM fieldnames to be updated to improve clarity regarding savings baselines by using abbreviations for “Standard” and “Pre-existing” baselines in place of “1st“ and “2nd“ baselines.** Final2019 claims reporting data showed that “1st“ and “2nd“ baseline savings were sometimes erroneously swapped for some Measure Application Types.

### **DEER Error Corrections and Clarifications**

Major changes were made to the DEER system under the DEER2020 Update. During this effort, the building prototypes, modeling approach, and peak demand period were significantly modified, but without ample time to thoroughly vet those updates. Although many errors and issues identified after the adoption of Resolution E-4952 DEER2020 Update have since been remedied, several more issues were uncovered or remain as described in the sub-sections that follow.

#### D.1 DEER Water Heater Calculator Corrections for Commercial Building Type

**This update corrects inconsistencies discovered in the water heater calculator.** The prior version of the calculator (version 4.1) miscalculated the weighted averages of the savings across all commercial building types (Com). A water heater calculator was re-issued (version 4.2) and the Preliminary Ex Ante Review (PEAR) and ExAnte energy impact records were updated.

#### D.2 Large Commercial Tankless Water Heater Savings

**Due to updated energy savings estimates in the DEER water heater calculator methodology, six large tankless commercial water heater measures that expired on December 31, 2020 are extended for use through December 31, 2022**.

#### D.3 Water-cooled Chiller Measure Tier Definitions

**The 2023 DEER update will revise the efficiency tiers for Path B *water-cooled* chiller tiers** such that they exceed Title 24 minimum efficiency requirements as follows: a) Tier 1 at 7 percent full-load efficiency improvement and b) 12 percent part-load efficiency improvement and Tier 2 at 7 percent full-load efficiency improvement and 17 percent part-load efficiency improvement

#### D.4 DEER2020 Residential Measures Missing Some Energy Impacts

**Energy Impact records for 92 residential measures were missing for the multifamily (MFm) and mobile home (DMo) building types in three climate zones (CZ): CZ14, CZ15, and CZ16. For these zones, the missing Energy Impact records were added, and the Res building type records were corrected.**

#### D.5 Residential Duct Sealing Measures Normalizing Unit Modification

For furnace-only HVAC systems it makes more sense to use Cap-kBTUh as the normalizing unit rather than Cap-Tons. **The Energy Impact records using kBtu/h as the normalizing unit for BldgHVAC=NCGF were uploaded to PEAR.**

#### D.6 Residential Duct Sealing GSIA Values Expiration

**Duct sealing measures will use the GSIA default value of 1.0.** The previous GSIA values for duct sealing GSIA\_IDs were based on EM&V from 2006-08 and are out of date. The 2018 EM&V realization rate is 95% based on billing analysis that captures both realization rate and installation rate so the default GSIA value is justified.

#### D.7 Refrigerator/freezer Measures Normalizing Unit Modification

**The refrigerator/freezer normalizing unit was updated to “Household” instead of “Area-ft2.”** The Energy Impact records were revised to reflect the change to NormUnit, but no changes were made to the unit energy savings.

#### D.8 Fuel Substitution Default NTG Applicability Clarification

**The delivery type options for the “FuelSubst-Default” NTG ID were corrected** so that this NTG ID is now available for use with fuel substitution measures offered through any delivery type.

#### D.9 Align Residential Clothes Washer Measures with ENERGY STAR® Tiers

**To align existing DEER measures with the applicable standards, all three tiers of the front- and top-loading clothes washer measures are updated.** This update was necessary because the current ENERGY STAR Version 8.0 clothes washer program requirements use efficiency tiers that did not align with the measures available in DEER.

#### D.10 Align Residential Dishwasher Measures with ENERGY STAR® Tiers

**To align existing DEER measures with the applicable standards, all three tiers of standard capacity dishwasher measures are updated**. This was necessary because the EPA has increased the minimum efficiency requirements for residential dishwashers, decreasing the annual energy consumption allowance for standard sized models to 240 kWh/year.

#### D.11 Whole-house Fan Measure Updates

T**he DEER whole-house fan measure modeled savings are increased based on a review of related EM&V studies.** The DEER whole-house fan measure savings were thoroughly reviewed, and the methodology was documented. One of the DEER savings assumptions, that occupants open windows and run the fan half the time that savings are available, is not based on any concrete evidence. The savings were compared to CEC-modelled savings and compared to two California EM&V studies based on measured savings. The comparison suggests that earlier DEER whole-house fan savings are too low.

#### D.12 Residential Gas Furnace Fan Efficiency Revision

As a result of an update to the Federal standards that now require an electrically commutated motor in all residential furnaces, **the electric savings for the DEER2020 furnace upgrade measures will decrease to zero for ten high-AFUE measures and** **the standard-AFUE furnace measure that only offers a high-efficiency motor upgrade will be expired.**

#### D.13 LED Commercial Lighting Measure Clarification

All but three LED lighting measures were expired in 2020 due to LED becoming the baseline. Three commercial measures were retained by using a higher-performance LED, as measured in lumens per watt (lm/W). Resolution E-4952 DEER2020 Update (published in 2018) set the base and measure cases using the Lighting Facts database, but this database was not updated after 2018 and could no longer be used to set efficacy standards.

In a November 3, 2020, disposition letter, the 2021 measure package expiration dates were extended to December 31, 2022, due to the impact of COVID on markets. **Program administrators are instructed to submit revised measure packages reflecting revised efficacy assumptions by June 1, 2022 such that those measures can become effective January 1, 2023.** (See Section B for changes to the measure package review process.)

### **Updates Based on Review of EM&V Studies**

CPUC reviewed recent EM&V findings and updated savings estimate parameters or approaches and NTG values where they indicate a substantial difference from current DEER values. EM&V sector evaluation results and/or special studies will continue to be some of the primary sources for measure updates. Evaluation results with acceptable rigor and precision are used to update measure assumptions.

#### E.1 Upstream and Midstream Program Tracking Data Requirements

**CPUC will require site-specific data for all claims and eliminate the current exception for upstream and midstream delivery types.** This change is required to address recurring concerns with upstream and midstream programs and systematically capture the data needed to evaluate these programs. The detailed requirements and data specification are provided in Attachment Section 5.1. We also direct the PAs to populate the “Data Collection Requirements” section of the deemed measure template, working with evaluation staff to develop the specification for each measure.

#### E.2 Updates per Residential Sector 2019 EM&V

**The NTG ratios for natural gas water heaters, multifamily water heater control measures, and smart controllable thermostats (SCT) will be updated based on the 2019 EM&V studies.** Natural gas tankless storage water heater NTG values will decrease to 0.40 from 0.55, while multifamily recirculating pump demand control and multifamily temperature controller measure NTG values will increase to 1.0 and 0.94, respectively, for direct install programs. **The SCT update for PY2022 based on 2019 EM&V results will be considered via the measure package update process, see Section B for changes to the measure package review process.**

#### E.3 Updates per Non-residential Lighting 2019 EM&V

**We direct the use of the 2019 EM&V results to update the NTG values for both LED fixtures and TLEDs to 0.65 for PY2023.** The PY2019 evaluation provided the first opportunity to conduct NTG research for the LED lighting measures that use an LED baseline.

#### E.4 Updates per HVAC sector 2019 EM&V

**CPUC will update residential sector NTG values for fan motor control (0.88), condenser coil cleaning (0.8), and the refrigerant charge adjustment measure must be discontinued by 12/31/2023.** The HVAC measure groups that were evaluated for PY2019 include both commercial and residential sectors. There are no recommended commercial sector updates to DEER measures but were several updates to residential measures. In addition, the refrigerant charge adjustment (RCA) measure will be discontinued at the end of 2023 to reflect CPUC low-GWP refrigerant guidance recommendations.

#### E.5 Updates per Small/Medium Commercial sector 2019 EM&V

**CPUC will update the NTG value for ozone process laundry from 0.60 to 0.70 based on the EM&V results**. A total of four small/medium commercial measure groups were evaluated for PY2019 but this was the only measure that warranted an update or had not already been updated last year.

### **Review of Codes and Standards**

There were updates to natural gas packaged boiler and residential gas furnace measures based on federal code revisions. There are no CEC Title 20 Appliance Efficiency related updates because most Federal appliance and equipment efficiency standard updates were suspended.

#### F.1 Federal Standard for Commercial Natural Gas Packaged Boilers

**Changes to the federal standard, effective January 10, 2023,[[24]](#footnote-25) increase the minimum efficiency ratings** **for all but the very large commercial packaged boilers**, resulting in changes to the energy savings for high-efficiency space-heating boilers and instantaneous tankless water heaters.

#### F.2 Federal Standard for Residential Gas Furnace Fan

**Due to a Federal requirement for ECM motors in all residential furnaces, the electric savings for all high-AFUE furnaces will decrease to zero.**

#### F.3 New Low Global Warming Potential Refrigerant Standards

Under California State Senate Bill (SB) 1383, the CPUC and other state regulatory agencies are called upon to assess the operational performance of refrigerants with Low Global Warming Potential (GWP) and to develop a strategy to encourage the adoption of those low-GWP refrigerants in equipment funded by energy efficiency programs overseen by the CPUC. The most recent California Air Resources Board (CARB) proposed amendment to regulations on HFCs will delay the transition timing from 2023 to 2025. **When the new low-GWP regulations are in place, the baselines for affected deemed measures containing refrigerant will need to be updated through the measure package submittal process, see Section B for changes to the measure review process**.

#### F.4 CEC Title 24 Building Energy Efficiency Code Updates

**The 2022 Building Energy Efficiency Standards have not been finalized.** These changes reflected in the new code will need to be incorporated as measures are naturally revised. They will also be applicable to the new era prototype that will be developed and become effective after 2025 when newly constructed buildings reflect the 2022 Title 24 code.

#### F.5 CEC Title 20 Appliance Efficiency Code Updates

No updates to the 2022 Appliance Energy Efficiency Standards are currently anticipated because most Federal appliance and equipment efficiency standard updates were suspended. If these updates are restarted and fast-tracked, it could require a major effort to update deemed measures since there are a significant number of suspended commercial and residential equipment and appliance updates.

### **Review of Market and Research Studies**

#### G.1 Update EULs Based on Group A EUL Studies

**Whole building EULs are revised for DEER2023 and vary—between 10.6 to 15.9 years—depending upon the proportion of annual savings that are electric.**

### **New Measure Additions**

CPUC will be implementing several new DEER database measures for 2023.

#### H.1 Commercial Tankless Water Heater

**A new measure will be added for a very high efficiency tankless water heater having a minimum thermal efficiency of 0.96.** Presently, deemed savings for this technology are only available in DEER for two efficiency tiers, but PAs have demonstrated that higher efficiency equipment has become available in the market to support a third tier. As this is a DEER method, additions or updates to measures must be approved and added by staff.

#### H.2 Multifamily Central Water Heating Systems

**New measures will be added for efficient centralized service hot water systems that are typical at some multifamily buildings**. These will be generated by first migrating the DEER multifamily eQUEST building prototypes to EnergyPlus™ (E+) and then modeling a centralized hot-water system.

### **2022 EM&V Updates**

CPUC staff will coordinate with PAs to identify measures affected for 2022 EM&V studies which updates could be considered for the DEER2024 to proactive plan the development of measure packages as soon as studies are under way.

# COMMENTS

Public Utilities Code section 311(g)(1) provides that this resolution must be served on all parties and subject to at least 30 days public review. Any comments are due within 20 days of the date of its mailing and publication on the Commission's website and in accordance with any instructions accompanying the notice. Section 311(g)(2) provides that this 30-day review period and 20-day comment period may be reduced or waived upon the stipulation of all parties in the proceeding.

The 30-day review and 20-day comment period for the draft of this resolution was neither waived nor reduced. Accordingly, this draft resolution was mailed to parties for comments, and will be placed on the Commission's agenda no earlier than 30 days from today.

# FINDINGS

1. Decision D.21-05-031 requires that CPUC staff propose changes to the Database of Energy Efficient Resources every even year via Resolution, through PY2023 (this resolution), with the associated comment/protest period provided by General Order 96-B.
2. Decision D.15-10-028 retains the direction from D.12-05-015 that DEER values be updated to be consistent with existing and updated state and federal codes and standards.
3. Decision D.15-10-028 also states that CPUC staff may make changes at any time without a Resolution to fix errors or to change documentation.
4. The proposed updates to the DEER values are a result of a) updates to underlying methodology or correction of errors, b) updates for corrections and clarifications, c) updates based on evaluation study results, d) new code updates, e) review of market and research studies, f) addition of new measures, and g) transition to the eTRM.
5. Decision D.05-01-055 establishes the CPUC Energy Division authority to review and approve measures, including authority to designate a set of values as the deemed data source of record.
6. The data reflected in the eTRM is synched to the source data in the ExAnte database, and measure permutations accessible in the remote ex ante data interface (READI) necessary for measure development and review.
7. The Energy Division maintains a suite of data resources that make up the "data source of record" of approved deemed values. The data used for Energy Division ex ante review are available in a data dictionary known as the Deemed Data Standard.
8. The eTRM meets the deemed data standard and provides the data access functions as data source of record previously provided by the Remote Energy Data Access Interface (READI) and the workpaper archive on deeresources.net.
9. Resolution E-5082 authorized CPUC staff to make adjustments to the eTRM development timeline to address issues that arise in development and testing.
10. Resolution E-5082 authorized the IOUs to fund eTRM development and CalTF support activities in their EE program budgets or their EM&V budgets.
11. The CPUC Energy Division will receive procurement authorization for IT services that will enable ownership, management and funding responsibilities in 2022.
12. Financial issues regarding joint ownership with publicly-owned utilities and other state agencies are addressed through revenue agreements.
13. Decision D.21-05-031 modifies the scope of the DEER Resolution to include approval of deemed ex ante values, direct research needs for future DEER updates, management of deemed ex ante value process and adoption of a locked, two-year version of deemed values to be used in forecasting, portfolio planning, and savings claims.
14. Decision D.21-05-031 modifies the DEER Resolution bus stop from September 1 to November 1.
15. This Resolution adopted updated requirements for the following processes: deadline for updates, review clocks, submission schedules, annual submittal plan.
16. This Resolution did not adopt updated requirements for dispute resolution and interim approval.

# THEREFORE, IT IS ORDERED THAT:

1. The DEER2023 and Revised DEER2022 and DEER2021 Updates, listed in Table 1, as described in Attachment A and supporting documentation available on the deeresources.com website, are approved with effective dates as listed.
2. Pacific Gas and Electric Company (PG&E), Southern California Electric Company (SCE), Southern California Gas Company (SoCalGas), and San Diego Gas & Electric (SDG&E), the San Francisco Bay Area Regional Energy Network (BayREN), Southern California Regional Energy Network (SoCalREN), Tri-County Regional Energy Network (3CREN), Local Government Sustainable Energy Coalition (LGSEC), Lancaster Choice Energy (LCE), and Marin Clean Energy (MCE) must use the updated assumptions, methods and values for 2021 and 2022 planning and savings claims, and 2023 planning, implementation and reporting.
3. This resolution adopts the eTRM as the ex ante deemed data source of record, replacing a) DEEResources.net for current and future measure packages and b) the READI application as the source for public access to CPUC-approved deemed measure data.
4. The eTRM schedule directed by Resolution E-5082 is continued into 2022. This schedule may be periodically updated by CPUC and will be available at deeresources.com.
5. CPUC may update the tables in Appendix I as the project develops and better information becomes available. An updated version of these tables will be kept on the deeresources.com website.
6. The DEER databases and eTRM shall continue to be administered and maintained by the IOU funders without changes to contract management until eTRM Release 2.5 in 2022.
7. Pacific Gas and Electric Company (PG&E), Southern California Electric Company (SCE), Southern California Gas Company (SoCalGas), and San Diego Gas & Electric (SDG&E) shall fund 2022 eTRM enhancement activities identified in Appendix I from their approved 2022 budgets with an extension to their existing vendor contract, ensuring sufficient funding for the incremental software development described in this resolution.
8. Pacific Gas and Electric Company (PG&E), Southern California Electric Company (SCE), Southern California Gas Company (SoCalGas), and San Diego Gas & Electric (SDG&E)may fund additional eTRM software enhancements, website administration and maintenance from their 2022 EM&V budgets or EE program budgets.
9. Pacific Gas and Electric Company (PG&E), Southern California Electric Company (SCE), Southern California Gas Company (SoCalGas), and San Diego Gas & Electric (SDG&E)shall not exceed budget caps ordered in D.18-05-041 to fund eTRM development.
10. Pacific Gas and Electric Company (PG&E), Southern California Electric Company (SCE), Southern California Gas Company (SoCalGas), and San Diego Gas & Electric (SDG&E) will grant the CPUC an irrevocable, royalty-free license to use, copy and distribute the eTRM in perpetuity while they continue to contract for administration, maintenance, and enhancements of the eTRM.
11. The Commission shall exert ownership of the portions funded by Pacific Gas and Electric Company (PG&E), Southern California Electric Company (SCE), Southern California Gas Company (SoCalGas), and San Diego Gas & Electric (SDG&E) of the eTRM with agreement from the IOU funders under the auspices of a pending IT procurement for Energy Efficiency Branch.
12. This resolution delegates authority to the Energy Division to manage necessary software licensing and ownership transfer issues in accordance with State procurement policies, including Revenue Agreements with POUs and other State Agencies with an ownership stake in the eTRM.
13. Pacific Gas and Electric Company (PG&E), Southern California Electric Company (SCE), Southern California Gas Company (SoCalGas), and San Diego Gas & Electric (SDG&E), the San Francisco Bay Area Regional Energy Network (BayREN), Southern California Regional Energy Network (SoCalREN), Tri-County Regional Energy Network (3CREN), Local Government Sustainable Energy Coalition (LGSEC), Lancaster Choice Energy (LCE), and Marin Clean Energy (MCE) must follow the updated process adopted in this resolution for deemed ex ante activities as directed in this resolution.
14. Pacific Gas and Electric Company (PG&E), Southern California Electric Company (SCE), Southern California Gas Company (SoCalGas), and San Diego Gas & Electric (SDG&E), the San Francisco Bay Area Regional Energy Network (BayREN), Southern California Regional Energy Network (SoCalREN), Tri-County Regional Energy Network (3CREN), Local Government Sustainable Energy Coalition (LGSEC), Lancaster Choice Energy (LCE), and Marin Clean Energy (MCE) must comply with the updated schedule for activities adopted in this resolution unless expressly authorized by CPUC staff.

This Resolution is effective today.

I certify that the foregoing resolution was duly introduced, passed and adopted at a conference of the Public Utilities Commission of the State of California held on August 5, 2021; the following Commissioners voting favorably thereon:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Rachel Peterson Executive Director

Attachment A

DEER2023 Update Summary

Contents

[1 Introduction and background A-5](#_Toc72998572)

[2 Transition to Electronic Technical Reference Manual (eTRM) A-5](#_Toc72998573)

[3 DEER methodology updates A-5](#_Toc72998574)

[3.1 Feasibility study for transitioning to EnergyPlus™ A-5](#_Toc72998575)

[3.2 Update simulation weather files to CZ2022 A-6](#_Toc72998576)

[3.3 Peak demand period definition update A-12](#_Toc72998577)

[3.4 Modifications to allow new load shape sources A-14](#_Toc72998578)

[3.5 Measure cost methodology and documentation guidance A-14](#_Toc72998579)

[3.6 Refrigerant avoided costs A-15](#_Toc72998580)

[3.7 Expire all deemed refrigerant charge adjustment measures A-16](#_Toc72998581)

[3.8 Clarify add-on equipment approach to EUL A-18](#_Toc72998582)

[3.9 Clarify approach to DEER GSIA table updates A-18](#_Toc72998583)

[3.10 Custom measure usage of deemed values A-18](#_Toc72998584)

[3.11 Revisions to fieldnames for baseline clarity A-18](#_Toc72998585)

[4 DEER error corrections and clarifications A-20](#_Toc72998586)

[4.1 DEER water heater calculator corrections for commercial buildings A-20](#_Toc72998587)

[4.2 Large commercial tankless water heater measure extensions A-20](#_Toc72998588)

[4.3 Water-cooled chiller measure tier definitions A-21](#_Toc72998589)

[4.4 DEER2020 residential measures missing some energy impacts A-22](#_Toc72998590)

[4.5 Residential duct sealing measures normalizing unit modification A-22](#_Toc72998591)

[4.6 Residential duct sealing GSIA values expiration A-22](#_Toc72998592)

[4.7 Refrigerator/freezer measures normalizing unit modification A-22](#_Toc72998593)

[4.8 Fuel substitution default NTG applicability clarification A-23](#_Toc72998594)

[4.9 Align residential clothes washer measures with ENERGY STAR® tiers A-23](#_Toc72998595)

[4.10 Align residential dishwasher measures with ENERGY STAR® tiers A-24](#_Toc72998596)

[4.11 Whole-house fan measure updates A-25](#_Toc72998597)

[4.12 Residential gas furnace fan efficiency revision A-28](#_Toc72998598)

[4.13 LED commercial lighting measure clarification A-29](#_Toc72998599)

[5 Review of energy efficiency EM&V and special studies A-29](#_Toc72998600)

[5.1 Upstream and midstream program tracking data requirements A-30](#_Toc72998601)

[5.2 Updates per residential 2019 EM&V reports A-31](#_Toc72998602)

[5.2.1 Residential water heaters A-32](#_Toc72998603)

[5.2.2 Multifamily boiler demand control at recirculation pumps A-33](#_Toc72998604)

[5.2.3 Multifamily hot-water loop temperature controller A-33](#_Toc72998605)

[5.2.4 Smart Controllable Thermostats A-33](#_Toc72998606)

[5.3 Updates per nonresidential lighting 2019 EM&V report A-34](#_Toc72998607)

[5.4 Updates per HVAC sector 2019 EM&V reports A-35](#_Toc72998608)

[5.4.1 Residential HVAC sector 2019 EM&V updates A-35](#_Toc72998609)

[5.5 Updates per small\medium commercial 2019 EM&V report A-36](#_Toc72998610)

[5.5.1 Process ozone laundry A-37](#_Toc72998611)

[5.5.2 Process pump VFD A-37](#_Toc72998612)

[5.5.3 Commercial tankless water heaters A-37](#_Toc72998613)

[6 Review of codes and standards A-38](#_Toc72998614)

[6.1 Federal standards for commercial natural-gas packaged boilers A-38](#_Toc72998615)

[6.2 Federal standard for residential gas furnace fan A-39](#_Toc72998616)

[6.3 New low global warming potential refrigerant standards A-39](#_Toc72998617)

[6.4 CEC Title 24 building energy efficiency code updates A-40](#_Toc72998618)

[6.5 CEC Title 20 appliance efficiency code updates A-42](#_Toc72998619)

[7 Review of market and research studies A-42](#_Toc72998620)

[7.1 Update EULs based on Group A Effective Useful Live (EUL) study A-42](#_Toc72998621)

[8 New measure additions A-43](#_Toc72998622)

[8.1 Commercial tankless water heater A-43](#_Toc72998623)

[8.2 Multifamily central water heating systems A-44](#_Toc72998624)

[9 Support table updates A-44](#_Toc72998625)

[9.1 New EUL values A-44](#_Toc72998626)

[9.2 Expired EUL values A-45](#_Toc72998627)

[9.3 New technology type A-46](#_Toc72998628)

[9.4 New support table fields for refrigerants A-47](#_Toc72998629)

[9.5 DEER2008/2011 records added to DEER2022 load shape tables A-47](#_Toc72998630)

[10 APPENDIX I: Assessment of eTRM and Data Source of Record criteria A-48](#_Toc72998631)

Lists of Tables and Figures

[Table A-3‑2. DEER Commercial Building type descriptions and codes A-9](#_Toc72998632)

[Table A-3‑3. Comparison of CZ2010 and CZ2022 peak demand period start-dates A-13](#_Toc72998633)

[Table A-3‑4. Weather stations representing Title 24 climate zones A-13](#_Toc72998634)

[Table A-3‑5. Expired Refrigerant Charge Adjustment (RCA) measures A-16](#_Toc72998635)

[Table A-3‑6. Current and DEER2022 fieldnames for CET, CEDARS, and eTRM A-19](#_Toc72998636)

[Table A-3‑7. DEER2023 fieldnames for CET, CEDARS, and eTRM A-20](#_Toc72998637)

[Table A-4‑1. Expiry date updates for large tankless commercial water heater measures A-21](#_Toc72998638)

[Table A-4‑2. GSIA IDs to be expired effective 2020-12-31 A-22](#_Toc72998639)

[Table A-4‑3. Residential clothes washer measure criteria, capacity between 1.6- A-23](#_Toc72998640)

[Table A-4‑4. Relevant DEER measures for residential clothes washers A-24](#_Toc72998641)

[Table A-4‑5. Residential Dishwasher, Standard Capacity Measure Criteria A-25](#_Toc72998642)

[Table A-4‑6. Relevant DEER measures for residential dishwashers A-25](#_Toc72998643)

[Table A-4‑7. DEER input parameters for the whole-house fan measure A-27](#_Toc72998644)

[Table A-4‑8. Enabled periods by climate zone for the whole-house fan measure A-27](#_Toc72998645)

[Table A-4‑9. Residential furnace measures to be expired A-28](#_Toc72998646)

[Table A-5‑1. Assessment of expected 2019 EM&V study results A-30](#_Toc72998647)

[Table A-5‑2. Customer-reported age of replaced water heaters A-32](#_Toc72998648)

[Table A-5‑3. PY2019 evaluated net-to-gross ratio by nonresidential lighting type A-34](#_Toc72998649)

[Table A-6‑1. Federal standards update for commercial natural gas packaged boilers A-38](#_Toc72998650)

[Table A-6‑2. DEER measures affected by update to federal standards A-38](#_Toc72998651)

[Table A-6‑3. New residential furnace measures A-39](#_Toc72998652)

[Table A-7‑1. Updated effective/remaining useful life values for whole-building retrofit A-43](#_Toc72998653)

[Table A-8‑1. New large tankless commercial water heater measure A-44](#_Toc72998654)

[Table A-9‑1. Effective/remaining useful life values A-44](#_Toc72998655)

[Table A-9‑2. Expired non-lighting effective useful life (EUL) IDs as of 2021-12-31\* A-45](#_Toc72998656)

[Table A-9‑3. Expired lighting effective useful life (EUL) IDs as of 2021-12-31 A-46](#_Toc72998657)

[Table A-9‑4. New fields for refrigerant NPV avoided costs A-47](#_Toc72998658)

[Table A-10‑1. Phase 1 eTRM enhancements assessment A-48](#_Toc72998659)

[Table A-10‑2. Phase 1 data field requirements assessments A-49](#_Toc72998660)

[Table A-10‑3. Phase 2 eTRM enhancements assessments A-51](#_Toc72998661)

[Table A-10‑4. Phase 2 data field requirements assessments A-63](#_Toc72998662)

[Table A-10‑5. Phase 3 enhancements for release 2.4 in 2022 A-65](#_Toc72998663)

[Table A-10‑6. Acceptance criteria for system performance A-66](#_Toc72998664)

[Figure A-3‑1. Annual savings by climate zone for commercial split/package AC systems A-7](#_Toc72998665)

[Figure A-3‑2. Annual savings by building type for commercial split/package AC systems A-8](#_Toc72998666)

[Figure A-3‑3. Annual savings by climate zone for 92 AFUE commercial furnaces A-8](#_Toc72998667)

[Figure A-3‑4. Annual savings by building type for 92 AFUE commercial furnaces A-9](#_Toc72998668)

[Figure A-3‑5. Annual savings by climate zone for 18 SEER residential split/package AC systems A-10](#_Toc72998669)

[Figure A-3‑6. Annual savings by building type for 18 SEER residential split/package AC systems A-10](#_Toc72998670)

[Figure A-3‑7. Annual savings by climate zone for 90 AFUE residential furnaces A-11](#_Toc72998671)

[Figure A-3‑8. Annual savings by building type for 90 AFUE residential furnaces A-11](#_Toc72998672)

# Introduction and background

Decision D.21-05-031, established the general approach to be used for the biennial Database for Energy Efficiency Resources (DEER) update. The updates are grouped into these nine topic areas:

1. Transition to eTRM

2. DEER methodology updates

3. DEER error corrections and clarifications

4. Review of energy efficiency evaluation, measurement, and verification (EM&V) studies

5. Review of codes and standards changes

6. Review of market and research studies

7. New measure additions

8. Support table updates

# Transition to Electronic Technical Reference Manual (eTRM)

The eTRM (electronic Technical Reference Manual) launched Version 2.1 in January 2021 in accordance with direction given in the DEER2022 update Resolution E-5082. Throughout 2021, CPUC staff continues to work on transitioning ex ante data and review activities to the eTRM environment. The “workpaper” term is updated to “measure package” for improved consistency with the eTRM framework. Furthermore, the distinction between DEER and non-DEER is eliminated.

# DEER methodology updates

DEER methodology updates affect the methods and approaches used to generate measures savings and support table values. Examples include changes that would alter the database structure, building prototype models, or the use of DEER database measures.

## Feasibility study for transitioning to EnergyPlus™

*Effective Program Year: 2024-2026.* From Commission staff’s ongoing analysis of the 2019 RASS data and other updates considered for the existing deemed building prototype system, it has become increasingly obvious that a forward-focused, significant overhaul of the existing system is needed rather than incremental modification and streamlining. Although the system was restructured for DEER2020, many of the basic underpinnings and assumptions used to construct and ground the models are also in need of updates and in need of additional transparency. Rather than streamlining and updating elements of the existing system as was proposed in the Scoping Document,[[25]](#footnote-26) Commission Staff will instead conduct a feasibility study to assess the options for transitioning to an EnergyPlus-based system and away from the current eQUEST™/DOE2.3™-based system. Commission Staff’s primary and critical need is to have a functional set of prototypes system that can be used to provide unit energy savings, unit energy added loads, and the associated load shapes for deemed energy efficiency measures.

Another primary reason for pausing updates to the current prototype system is to allow use of the new CZ2022 weather data as quickly as possible to update measure packages. This urgency is driven by the need for PAs to submit a two-year ABAL to cover PY2022-2023 as directed by Decision D.21-05-031.[[26]](#footnote-27) The P&G and the latest avoided costs already incorporate the CZ2022 weather data, so the measure packages used for ABALs should be synched as much as possible. Commission Staff and the PAs can use the existing MASControl3 (MC3) system as-is except for the changes needed to run simulation with the new CZ2022 weather files. Commission staff will focus immediately on working with PAs to identify the highest impact measures for the portfolio and utility measures and generate the updated results. Other measures can be processed for a PY2023 update or used as-is until the next iteration of prototypes as determined by the feasibility plan.

## Update simulation weather files to CZ2022

*Effective Program Year: 2023-24.* The last ten years have been observed to be among the hottest on record, and temperatures and the frequency-duration of heat waves are expected to increase. The typical meteorological year (TMY) weather files used for deemed measure building simulations to date, CZ2010, were based on 12 years of National Oceanic Atmospheric Administration (NOAA) data from 1988 through 2009. PG&E launched a project in collaboration with the other IOUs, CEC, CPUC and White Box Technologies to update the typical year weather files used in California and produced a report[[27]](#footnote-28) and presentation[[28]](#footnote-29) documenting the methodology. New weather files (CZ2022) were created using a 20-year period from 1998 through 2017. The California Energy Commission (CEC) will be adopting new time-dependent valuation (TDV) costs and the CZ2022 weather data for the 2022 Title 24 update, effective January 1, 2023. To be in alignment with CEC, all non-residential simulated and other weather-dependent deemed measures will be updated with the CZ2022 weather data, with updated deemed savings values effective for program year 2023. The residential weather dependent measures will all be updated for program year 2024. All other weather-dependent deemed measures (residential and non-residential) not provided directly by CPUC-maintained tools effective January 1, 2023 and later shall also be updated using the CZ2022 weather files.

The new weather files are located on the DEER Resources website[[29]](#footnote-30) and should be used by replacing the old (.BIN) weather files with the new (.BIN) weather files in the “DOE2/weather” folder before running the model. We are also making changes to the existing peak demand period with this weather update; see section 3.2 for updates to the starting date for the 3-day “heat wave” used to calculated peak demand. New post-processing scripts will be published on the DEER website that incorporate these new dates.

The following figures show examples of cooling dominated and heating dominated deemed measure savings estimated by building simulations using the new weather files compared to the old weather files for commercial and residential sectors. Across the board, cooling savings are higher and heating savings are lower using the new CZ2022 weather than they are using the older CZ2010 weather. The savings are shown in Figure A-3‑1 for a 12.5 EER,[[30]](#footnote-31) 65 kBtu/h non-residential split/package air conditioning unit by California CEC climate zone.

Figure A-3‑1. Annual savings by climate zone for commercial split/package AC systems

Equipment capacity: 65 kBtu/h; Equipment efficiency: 12.5 EER

Climate zones 4, 6, 8, 10 and 13 show the most change in cooling savings due to the new weather. Figure A-3‑2 shows average deemed measure savings for the same system by DEER non-residential building types. The building type descriptions and corresponding abbreviations are shown in Table A-3‑1. The refrigerated warehouse building type shows the most difference in savings due to the change in weather. Both figures show that, some climate zones and some building types show a greater weather impact than others.

Figure A-3‑2. Annual savings by building type for commercial split/package AC systems

Equipment capacity: 65 kBtu/h; equipment efficiency: 12.5 EER

The next two figures show average heating savings from a non-residential, roof-top, package 92 AFUE furnace by climate zone in Figure A-3‑3 and by building type in Figure A-3‑4.

Figure A-3‑3. Annual savings by climate zone for 92 AFUE commercial furnaces

Figure A-3‑4. Annual savings by building type for 92 AFUE commercial furnaces

Table A-3‑1. DEER Commercial Building type descriptions and codes

| Description | Code |  | Description | Code |
| --- | --- | --- | --- | --- |
| Assembly | Asm |  | Nursing Home | Nrs |
| Community College | ECC |  | Large Office | OfL |
| Primary School | EPr |  | Small Office | OfS |
| Secondary School | ESe |  | Fast-Food Restaurant | RFF |
| University | EUn |  | Sit-Down Restaurant | RSD |
| Grocery | Gro |  | Department Store | Rt3 |
| Hospital | Hsp |  | Big Box Retail | RtL |
| Hotel | Htl |  | Small Retail | RtS |
| Bio/Tech Manufacturing | MBT |  | Conditioned Storage | SCn |
| Light Industrial Manufacturing | MLI |  | Refrigerated Warehouse | WRf |
| Motel | Mtl |  |  |  |

The following figures show the effects of the weather change on residential cooling and heating measures. Figure A-3‑5 shows the savings from an 18 SEER air conditioner by climate zone and Figure A-3‑6 shows the savings from the same equipment by building type. We see same trend as in the commercial measures of increased energy savings for cooling dominated measures and decreased savings for heating dominated measures.

Figure A-3‑5. Annual savings by climate zone for 18 SEER residential split/package AC systems

Figure A-3‑6. Annual savings by building type for 18 SEER residential split/package AC systems

Figure A-3‑7 shows the average annual savings for a 90 AFUE residential furnace by climate zone and

Figure A-3‑8 shows the savings for the same equipment by building type. We see the same trend as in commercial heating dominated measures, where savings are reduced across all climate zones and building types using the new weather.

Figure A-3‑7. Annual savings by climate zone for 90 AFUE residential furnaces

Figure A-3‑8. Annual savings by building type for 90 AFUE residential furnaces

*Effective Program Year: 2022.* The switch from CZ2010 to CZ2022 weather data for DEER2023 measures calls for a new field—*Weather*—be added to the following tables in the PEAR/ExAnte databases: Measure, LoadShapeElec\_2022, and LoadShapeGas\_2022. If PY 2022 workpapers are submitted that use CZ2022 weather data, the new *Weather* field will need to be added to the Measure table within the submitted ExAnte Data (EAD) workbook.

*Effective Program Year: 2023.* The new *Weather* field will need to be added to the eTRM permutations table that is submitted with each new measure package. Coordination with the Reporting PCG, CEDARS, and the PAs will be necessary.

## Peak demand period definition update

*Effective Program Year: 2023.* We must update the peak demand period dates to align with the new building simulation weather files, so the peak kW consumption is accurately calculated. The current approach to develop peak demand periods is as follows: Electric peak demand impacts for energy efficiency measures are represented by the average kWh reduction over a 15-hour window. The 15-hour window is from 4 p.m. to 9 p.m. (5 hours) over a three-day “heat wave” that occurs on consecutive days in June through September. The first day of that heat wave is determined for each climate zone and marks the start date for the peak demand period.

The rules used to identify the three-day peak demand periods for the new weather data can be summarized more simply as follows:

* Consistent with Title 24 and CZ2010, a 2009 calendar year is used to determine which days are weekends and holidays
* The heat wave occurs between June 1 and September 30
* The heat wave occurs on consecutive days and does not include weekdays or holiday
* The heat wave has the highest index value computed by adding and giving equal weight to each of these values:
	+ The peak temperature over the three-day period
	+ Average temperature over the three-day period
	+ The average temperature from 4 p.m. to 9 p.m. over the three-day period

This general approach is outlined in the previous 2014 weather update document[[31]](#footnote-32) and the CPUC Energy Efficiency Policy Manual,[[32]](#footnote-33) and an update to the peak demand period hours of 4 p.m. to 9 p.m. was specified in the DEER2020 Update.[[33]](#footnote-34)

The peak demand period start-dates determined for the new CZ2022 weather file data are presented in Table A-3‑2 along with the previous CZ2010 values.

Table A-3‑2. Comparison of CZ2010 and CZ2022 peak demand period start-dates

| **Climate Zone** | **CZ2010 (Title 24 2013) Weather Files** | **CZ2022 (Title 24 2022) Weather Files** |
| --- | --- | --- |
| **Start Date** | **Week-day** | **Temperature (°F)** | **Start Date** | **Week-day** | **Temperature (°F)** |
| **Maximum Peak** | **3-day Average** | **Maximum Peak** | **3-day Average** |
| CZ01 | Sep | 16 | Wed | 81 | 59.8 | Aug | 26 | Wed | 86 | 60.2 |
| CZ02 | Jul | 8 | Wed | 103 | 75.9 | Aug | 26 | Wed | 102 | 74.7 |
| CZ03 | Jul | 8 | Wed | 91 | 69.2 | Aug | 26 | Wed | 87 | 71.3 |
| CZ04 | Sep | 1 | Tue | 99 | 77.5 | Aug | 26 | Wed | 101 | 80.0 |
| CZ05 | Sep | 8 | Tue | 87 | 64.8 | Sep | 16 | Wed | 93 | 68.3 |
| CZ06 | Sep | 1 | Tue | 102 | 77.1 | Sep | 2 | Wed | 85 | 76.1 |
| CZ07 | Sep | 1 | Tue | 90 | 73.9 | Sep | 2 | Wed | 83 | 74.4 |
| CZ08 | Sep | 1 | Tue | 105 | 79.8 | Sep | 2 | Wed | 98 | 79.7 |
| CZ09 | Sep | 1 | Tue | 107 | 86.6 | Sep | 1 | Tue | 100 | 82.9 |
| CZ10 | Sep | 1 | Tue | 109 | 86.3 | Jun | 29 | Mon | 105 | 85.5 |
| CZ11 | Jul | 8 | Wed | 113 | 88.3 | Jun | 29 | Mon | 110 | 90.2 |
| CZ12 | Jul | 8 | Wed | 109 | 82.4 | Jun | 29 | Mon | 107 | 84.5 |
| CZ13 | Jul | 8 | Wed | 108 | 86.7 | Jun | 29 | Mon | 109 | 90.6 |
| CZ14 | Aug | 26 | Wed | 105 | 86.8 | Jun | 29 | Mon | 109 | 88.9 |
| CZ15 | Aug | 25 | Tue | 112 | 97.5 | Jun | 29 | Mon | 120 | 100.8 |
| CZ16 | Jul | 8 | Wed | 90 | 78.8 | Aug | 12 | Wed | 88 | 77.7 |

The first thing to notice about the new values is that for about half the climate zones the month of the peak has shifted, but not consistently in one direction. For some climate zones, the peak happens a month sooner but for others it happens a month later. In addition, for some climate zones the CZ2022 peak temperatures are lower than the CZ2010 values, but that may be because the hottest day of the year has shifted outside of the conventional June-September summer period, for example for CZ08 the hottest days of the year for CZ2022 weather data occur in October. For these reasons, CPUC staff may explore revision to the peak demand period definition for the 2024 DEER update.

For reference, the weather stations used to represent the Title 24 climate zones are provided in Table A-3‑3.

Table A-3‑3. Weather stations representing Title 24 climate zones

| Climate Zone | Weather Station locations |
| --- | --- |
| Location | Elevation (ft) |
| CZ01 | Arcata | 203 |
| CZ02 | Santa Rosa | 125 |
| CT03 | Oakland | 6 |
| CZ04 | San Jose-Reid  | 135 |
| CZ05 | Santa Maria | 253 |
| CZ06 | Torrance | 88 |
| CZ07 | San Diego-Lindbergh | 13 |
| CZ08 | Fullerton | 395 |
| CZ09 | Burbank-Glendale | 741 |
| CZ10 | Riverside | 840 |
| CZ11 | Red Bluff | 348 |
| CZ12 | Sacramento | 16 |
| CZ13 | Fresno | 335 |
| CZ14 | Palmdale | 2,523 |
| CZ15 | Palm Springs-Intl | 475 |
| CZ16 | Blue Canyon | 5,279 |

## Modifications to allow new load shape sources

*Effective Program Year: 2023.* New sources of generalized load shape parameters (e.g., simulation-based tools or advanced metering infrastructure analysis) could originate from impact evaluations or from studies conducted to support measure packages will be noted. For 2023, PAs may also produce new load shapes using simulation outputs or advanced metering infrastructure (AMI) analysis and submit them using the load shape processing workbooks available on the DEEResources.com website.[[34]](#footnote-35) These load shapes will be reviewed through the measure package review process and included as possible shapes for processing into avoided cost combinations for 2023 claims. The details of the 2023 processes may not be the same as current processes.[[35]](#footnote-36) The expectation is that all measures with updates will use the deemed load shapes made available in as of 2022-01-01. Measures that have an urgent need for additional load shapes—for measure packages submitted after the DEER2023 Resolution and before the next avoided cost update—may either request creation of a new load shape or use any one of the load shape processes available next year.

Resolution E-5082 described the format and database changes that were made to accommodate load shapes. As we transition to the eTRM database, the load shapes will be incorporated into the eTRM database structure.

## Measure cost methodology and documentation guidance

*Effective Program Year: 2023.* The DEER database contains tables with outdated gross incremental measure costs because the costs for all measures are updated in measure packages and are approved by the review team. When upstream lighting comprised the majority of portfolio savings, the cost information was quite detailed based on extensive review and EM&V. As the portfolio becomes more diversified and as cost effectiveness continues to be refined, the measure costs must also remain as up to date as the savings estimates and avoided costs. The DEER2023 update expires out-of-date values and revises the measure cost tables to align with the eTRM transition. The DEER2023 update also clarifies the following to ensure the gross incremental measure costs are aligned:

* For normal replacement measures, the costs for standard/code baselines should align (e.g., if two measures use the same baseline efficiency assumption in a model, they should both use the same baseline costs).
* For accelerated replacement measures, the costs need to address remaining useful life (RUL) and expected useful life (EUL) periods properly, as described in the Energy Efficiency Policy Manual.[[36]](#footnote-37) The following equation summarizes the policy manual definition of accelerated replacement costs (ARC) based on full measure cost (FMC), standard efficiency measure cost (SMC), discount rate of capital (D) and the RUL of the replaced equipment:

$$ARC=FMC-\frac{SMC}{(1+D)^{RUL}}$$

* For fuel-substitution measures, the labor costs do not often cancel out as they do for “like for like” replacement measures.
* For packages of measures and some specific measures, the costs should only include the energy saving measures/features and not include costs for non-energy impacts or aesthetic features

## Refrigerant avoided costs

*Effective Program Year: 2023.* D.21-05-031 directs program administrators to use the Refrigerant Avoided Cost Calculator (ACC) for portfolio forecasts, filings, and measure packages beginning in 2022. They further direct program administrators to “seek out all cost-effective opportunities to incorporate low-GWP measures in the energy efficiency portfolios.”[[37]](#footnote-38)

The Refrigerant Avoided Cost Calculator available on CPUC’s Cost Effectiveness information page is a new tool that will be used to calculate refrigerant carbon equivalent emission impacts to be included in cost effectiveness calculations in 2022.[[38]](#footnote-39) Using the Intergovernmental Panel on Climate Changes (IPCC) methodology and leveraging emissions estimates from the California Air Resources Board (CARB), the tool predicts the refrigerant leakage impact in a dollar equivalent avoided cost value. This calculator should be used to calculate the avoided costs of refrigerant leakage for any device containing a refrigerant (i.e. refrigerator, air conditioner, heat pump water heater, etc.). Note that the output field is labeled "net present value (NPV) avoided costs" regardless of whether that value represents a benefit or a cost, so users must be careful to input this data correctly into their cost-effectiveness tools. Positive avoided costs are a benefit while negative avoided costs are a cost in the California cost effectiveness tests.

The Refrigerant Avoided Cost Calculator tool calculates the refrigerant leakage for one piece of equipment at a time. To accurately account for the effect of a measure installed through an energy efficiency program, the NPV avoided cost of refrigerant leakage should be calculated for the baseline equipment and for the installed equipment, the difference of which is the NPV avoided cost attributable to the installed measure. For a heat pump replacing a gas furnace and air conditioner, the net cost of refrigerant leakage from heat pump fuel substitution measures could be significantly over-estimated if the replacement of an existing or planned air conditioner is not reflected.

The reporting of refrigerant leakage avoided costs is enabled by the refrigerant avoided cost calculator, required for PY2022 claims, and is applicable to all measures that contain refrigerant. Documentation of the refrigerant avoided cost inputs and a copy of the refrigerant avoided cost calculator are required for applicable measure package submissions as dictated by the CPUC schedule. New refrigerant avoided cost fields will need to be added to eTRM permutation tables as described in section 9.4.

## Expire all deemed refrigerant charge adjustment measures

*Effective Program Year: 2023.* The expiration of refrigerant charge adjustment (RCA) measures was based on a final report regarding the study conducted for the CPUC, “Proposer-Defined Study – A Roadmap for Accelerating the Adoption of Low-Global Warming Potential HVAC Refrigerants.”[[39]](#footnote-40) The study was triggered by California legislation directing the CPUC to develop a strategy for including low-global warming potential (GWP) HVAC refrigerants in incentivized energy-efficiency programs. The following conclusion supports this action:

**Refrigerant charge adjustments cause emissions to increase.** Our research on CARB and EPA emissions estimates shows operational refrigerant leakage stems from system leakage and incidental leaks when servicing the system. These types of emissions increase every time refrigerant is added to a system. Whenever hoses and gauges are attached to a unit, some minor leakage will occur. Significant leakage can occur because of a temperamental valve or a system getting overcharged. Feedback from HVAC contractors indicates that the standard practice is to avoid even checking the refrigerant charge unless all other common issues are ruled out, but this was not standard practice until just recently. Historical evaluated energy efficiency performance for air-conditioner maintenance programs focusing on refrigerant charge adjustments demonstrate these activities often provide minimal energy performance improvements.

Hence, the Measure IDs provided in Table A-3‑4 will be expired at the end of 2022.

Table A-3‑4. Expired Refrigerant Charge Adjustment (RCA) measures

| Measure ID | Description | Version | Start Date | Expiry Date |
| --- | --- | --- | --- | --- |
| **Non-residential** |  |  |  |  |
| NE-HVAC-RefChg-Inc-High-ntxv | Small Pkg AC system with No TXV, increase refrigerant charge from High under-charge (10 - 50%) to factory specified level | DEER2020 | 2020-01-01 | 2022-12-31 |
| NE-HVAC-RefChg-Inc-High-txv | Small Pkg AC system with TXV, increase refrigerant charge from High under-charge (10 - 50%) to factory specified level |
| NE-HVAC-RefChg-Inc-Low-ntxv | Small Pkg AC system with No TXV, increase refrigerant charge from Low under-charge (4 - 5%) to factory specified level |
| NE-HVAC-RefChg-Inc-Low-txv | Small Pkg AC system with TXV, increase refrigerant charge from Low under-charge (4 - 5%) to factory specified level |
| NE-HVAC-RefChg-Inc-Typ-ntxv | Small Pkg AC system with No TXV, increase refrigerant charge from Typical under-charge (4 - 50%) to factory specified level |
| NE-HVAC-RefChg-Inc-Typ-txv | Small Pkg AC system with TXV, increase refrigerant charge from Typical under-charge (4 - 50%) to factory specified level |
| **Residential** |  |  |  |  |
| RB-HV-RefChrg-DuctLoss-Typ-Inc | Increase Refrigerant Charge - Typical (8% rated charge) and Duct Sealing (medium to low) | DEER2020 | 2020-01-01 | 2022-12-31 |
| RE-HV-RefChrg-Dec-NTXV-typ | Decrease Refrigerant Charge - System with No thermal expansion valve (TXV) - Typical (8% rated charge) |
| RE-HV-RefChrg-Dec-TXV-typ | Decrease Refrigerant Charge - System with thermal expansion valve (TXV) - Typical (8% rated charge) |
| RE-HV-RefChrg-Inc-NoTXV-typ | Increase Refrigerant Charge - System with No thermal expansion valve (TXV) - Typical (8% rated charge) |
| RE-HV-RefChrg-Inc-NTXV-16pct | Increase Refrigerant Charge - System with No thermal expansion valve (TXV) - (16% rated charge) |
| RE-HV-RefChrg-Inc-NTXV-4pct | Increase Refrigerant Charge - System with No thermal expansion valve (TXV) - (4% rated charge) |
| RE-HV-RefChrg-Inc-TXV-16pct | Increase Refrigerant Charge - System with thermal expansion valve (TXV) - (16% rated charge) |
| RE-HV-RefChrg-Inc-TXV-4pct | Increase Refrigerant Charge - System with thermal expansion valve (TXV) - (4% rated charge) |
| RE-HV-RefChrg-Inc-TXV-typ | Increase Refrigerant Charge - System with thermal expansion valve (TXV) - Typical (8% rated charge) |

## Clarify add-on equipment approach to EUL

*Effective Program Year: 2023.* Resolution E-4818 adopted the definition for Add-On Equipment (AOE) as presented in Section 2.2.5 of the Preponderance of Evidence guidance document.[[40]](#footnote-41) The AOE definition states that the EUL of add-on equipment measures is capped at the RUL of the host equipment being retrofitted, and for deemed measure a default RUL is set at one-third the EUL. As stated in the guidance document, the default may be amended in a measure package when evidence to do so is provided. Additionally, the host equipment is defined as the equipment that uses less energy as a result of the add-on measure.[[41]](#footnote-42) However, in some cases the add-on measure is not installed directly on the host equipment allowing the measure to remain in place even if the host equipment is replaced. Current policy zeros out savings when the host equipment is replaced, but we recognize that savings for the remote AOE will in fact be greater than zero. We have allowed changes to the host equipment to increase the EUL of the add-on measure in some of these cases where the add-on measure is not installed directly on the host equipment.

## Clarify approach to DEER GSIA table updates

*Effective Program Year: 2023.* Decision D.11-07-030 (p. 22) initiated the tracking of installation rate values in DEER and populated them with EM&V results from the 2006-08 evaluation reports. The decision states that installation rates must be stored separately and not embedded in the gross savings for a measure. However, the DEER table name retains the Gross Savings and Installation Rate Adjustment factor (GSIA).[[42]](#footnote-43) Rather than storing the values as a product, it would be clearer if the tables were separated into an installation rate table for deemed measures and a realization rate table for custom measures. The Decision does not provide a mechanism for updating the GSIA values and many have not been updated since inception. The DEER2023 Update will create a new installation rate table and update the installation rate values stored in the table.

## Custom measure usage of deemed values

*Effective Program Year: 2021.* Deemed measures can be processed through the custom programs as long as the deemed savings values are used and deemed rebates amounts are not exceeded.[[43]](#footnote-44) This is not a change from previous policy, it is a restatement of existing policy that has not been consistently followed.

## Revisions to fieldnames for baseline clarity

*Effective Program Year: 2023.* Throughout the CEDARS, CET, and eTRM data platforms, the terms “1st baseline” and “2nd baseline” describe energy savings during either the RUL or EUL periods, depending upon the measure application type (MAT) of a given measure. In reviewing the claims reporting data for 2019, several thousand records were found to contain non-zero 2nd-baseline energy savings for measure application types other than “Accelerated Replacement” (AR). Since we anticipate that fewer mistakes will occur with field names that resemble more closely those long employed by DEER that describe the baselines in use, we are moving forward with this transition as presented in Table A-3‑5 and Table A-3‑6. The new field names should be used according to the default baseline policy for all sectors adopted by Resolution E-4818.[[44]](#footnote-45) These revisions will require coordination with the Reporting PCG, CET, CEDARS, the PAs, and the eTRM.

Table A-3‑5. Current and DEER2022 fieldnames for CET, CEDARS, and eTRM

| Unit-level, baseline-specific fieldnames | Rule by Measure Application Type (MAT) |
| --- | --- |
| **Current** |
| UnitkW1stBaseline | For NC and NR MATs:Non-zero, fuel-specific UES values using standard/code baseline | For AOE, BW, BRO and AR MATs: Non-zero, fuel-specific UES values using pre-existing baseline unless the delivery type is midstream or upstream where standard/code baseline is used[[45]](#footnote-46) |
| UnitkWh1stBaseline |
| UnitTherm1stBaseline |
| UnitkW2ndBaseline | For all MATs but AR:Zero UES values | For AR MAT: Non-zero, fuel-specific UES values[[46]](#footnote-47) using standard/code baseline  |
| UnitkWh2ndBaseline |
| UnitTherm2ndBaseline |
| UnitMeaCost1stBaseline | For NC and NR MATs:Non-zero, fuel-specific incremental cost values using standard/code baseline or pre-existing baseline | For AOE, BW, BRO and AR MATs: Non-zero, fuel-specific full measure cost values using pre-existing baseline |
| UnitMeaCost2ndBaseline | For all MATs except AR:Zero or null incremental cost values | For AR MAT, only: Non-zero incremental measure cost values[[47]](#footnote-48) using standard/code baseline  |
| **DEER2022 additions for fuel-substitution or interactive effects loads added** |
| UnitAddkW1stBaseline | For NC and NR MATs:Non-zero, fuel-specific added-load values using standard/code baseline | For AOE, BW, BRO and AR MATs: Non-zero, fuel-specific added-load values using pre-existing baseline |
| UnitAddkWh1stBaseline |
| UnitAddTherm1stBaseline |
| UnitAddkW2ndBaseline | For all MATs except AR:Zero or null added-load values | For AR MAT, only: Non-zero, fuel-specific added-load values using standard/code baseline  |
| UnitAddkWh2ndBaseline |
| UnitAddTherm2ndBaseline |

NC = new construction; NR = normal replacement; AOE = add-on equipment; AR = accelerated replacement; BW = building weatherization; BRO = behavioral, retro-commissioning or operational

Table A-3‑6. DEER2023 fieldnames for CET, CEDARS, and eTRM

| Unit-level, baseline-specific fieldname | Rule by Measure Application Type (MAT) |
| --- | --- |
| **DEER2023 version** |  |  |
| UESkWStdBaseline | For NC, NR, and AR MATs: Non-zero UES values using standard/code baseline | For AOE, BW, and BRO MATs: Zero or null UES values unless the delivery type is midstream or upstream where standard/code baseline is used[[48]](#footnote-49) |
| UESkWhStdBaseline |
| UESThermStdBaseline |
| UESkWPreBaseline | For AOE, BW, BRO and AR MATs: Non-zero UES values using pre-existing baseline unless the delivery type is upstream or midstream | For NC and NR MATs:Zero or null UES values |
| UESkWhPreBaseline |
| UESThermPreBaseline |
| UEAddkWStdBaseline | For NC, NR, and AR MATs:Non-zero, fuel-specific added-load values using standard/code baseline | For AOE, BW, and BRO MATs: Zero or null unit energy added-load values unless the delivery type is upstream or midstream |
| UEAddkWhStdBaseline |
| UEAddThermStdBaseline |
| UEAddkWPreBaseline | For AOE, BW, BRO, and AR MATs: Non-zero, fuel-specific unit energy added-load values using pre-existing baseline | For NC and NR MATs:Zero or null unit energy added-load values |
| UEAddkWhPreBaseline |
| UEAddThermPreBaseline |
| UnitMeaCostStd[[49]](#footnote-50) | For NC, NR, and AR MATs: Non-zero incremental cost value using standard/code baseline. | For AOE, BW, and BRO MATs: Zero or null cost unless delivery type is midstream or upstream |
| UnitMeaCostPre[[50]](#footnote-51) | For AOE, BW, BRO, and AR MATs: Non-zero full measure cost[[51]](#footnote-52) | For NC and NR MATs: Zero or null cost |

# DEER error corrections and clarifications

DEER error corrections or clarifications are those that typically impact the actual DEER values or application of the values.

## DEER water heater calculator corrections for commercial buildings

*Effective Program Year: 2021.* The commercial sector-wide energy savings (BldgType=Com) were incorrectly calculated in the *DEER\_WaterHeater\_Calculator\_v4.1.xlsm*. The savings calculations were corrected, the calculator was re-issued (*DEER\_WaterHeater\_Calculator\_v4.2.xlsm*), and both the Preliminary Ex Ante Review (PEAR) and Ex Ante energy impact records were updated to provide the corrected sector-wide energy savings (as of 2020-09-16).

## Large commercial tankless water heater measure extensions

*Effective Program Year: 2021.* After discussions with Southern California Gas (SCG), it was agreed that the DEER water heater calculator methodology does not accurately estimate the energy savings provided by efficient large non-residential tankless water heaters (≥200 kBtu/h input capacity) used to deliver service hot water. As a result, the following DEER measures—previously unavailable beyond December 31, 2020—have been extended for use through December 31, 2021 as shown in Table A-4‑1. Note that new unit energy savings (UES) values will be generated for DEER2023 due to changes to the Federal standards as described in Section 6.1.

Table A-4‑1. Expiry date updates for large tankless commercial water heater measures

| DEER Measure ID | Version | Start Date | Expiry Date |
| --- | --- | --- | --- |
| Revised | Previous |
| NG-WtrHt-LrgInst-Gas-gt200kBtuh-0p80Et | DEER2014 | 2013-01-01 | N/A | 2020-12-31 |
| NG-WtrHt-LrgInst-Gas-gt200kBtuh-0p85Et | 2022-12-31 | 2020-12-31 |
| NG-WtrHt-LrgInst-Gas-gt200kBtuh-0p90Et | 2022-12-31 | 2020-12-31 |
| NG-WtrHt-LrgInst-Gas-gte200kBtuh-lt2G-0p80Et | DEER2021 | 2021-01-01 | 2021-01-01 | none |
| NG-WtrHt-LrgInst-Gas-gte200kBtuh-lt2G-0p90Et |
| NG-WtrHt-LrgInst-Gas-gte200kBtuh-lt2G-0p96Et |

## Water-cooled chiller measure tier definitions

*Effective Program Year: 2023.* For all liquid chilling machines (chillers), Resolution E-4952 defined two tiers of chiller measures. Tier 1 must exceed Title 24 by 10 percent for both full and part load efficiencies. Tier 2 must exceed Title 24 minimum requirements by 15 percent for both full- and part-load efficiencies. Resolution E-5082 changed the efficiency criteria for Path B[[52]](#footnote-53) *air-cooled* chiller tiers, relaxing the full load efficiency requirement and increasing the part load efficiency requirement such that they exceed Title 24 minimum efficiency requirements as follows:

* Tier 1 at 7 percent full-load efficiency improvement and 12 percent part-load efficiency improvement
* Tier 2 at 7 percent full-load efficiency improvement and 20 percent part-load efficiency improvement

The 2023 DEER update will revise the efficiency tiers for Path B *water-cooled* chiller tiers such that they exceed Title 24 minimum efficiency requirements as follows:

* Tier 1 at 7 percent full-load efficiency improvement and 12 percent part-load efficiency improvement
* Tier 2 at 7 percent full-load efficiency improvement and 17 percent part-load efficiency improvement

## DEER2020 residential measures missing some energy impacts

*Effective Program Year: 2020.* Energy Impact records were missing for 92 residential measures at climate zones CZ14, CZ15, and CZ16 for the multifamily (MFm) and mobile home (DMo) building types. Along with providing the missing Energy Impact records, it was necessary to correct the sector-wide Energy Impact records for CZ14, CZ15, and CZ16 for the “Res” building type.

## Residential duct sealing measures normalizing unit modification

*Effective Program Year: 2021.* Historically, the normalizing unit for residential duct-sealing measures for all HVAC types was tons of cooling capacity (Cap-Tons). For furnace-only HVAC systems, however, it makes more sense to use Cap-kBTUh as the normalizing unit. A conversion methodology was developed for revising the normalizing unit and presented in *Res\_Duct-Sealing\_NormUnit=kBtuh\_rNCGF\_2020-11-19.xlsx*, available at deeresources.com. The resulting EnergyImpact records using Cap-kBTUh as the normalizing unit for BldgHVAC=rNCGF were uploaded to the PEAR database.

## Residential duct sealing GSIA values expiration

*Effective Program Year: 2021.* The gross savings and installation adjustment (GSIA)[[53]](#footnote-54) values for duct sealing GSIA\_IDs are out of date, based on EM&V from 2006-08, and will be expired as shown in Table A-4‑2. Duct sealing measures will use the GSIA default value of 1.0 given that 2018 EM&V realization rate is 95 percent based on billing analysis that captures both realization rate and installation rate. The older 2006-08 EM&V report found a high incidence of duct sealing measures that had not been installed due to one contractor who was promptly removed from the program.

Table A-4‑2. GSIA IDs to be expired effective 2020-12-31

| GSIA\_ID | GSIA Value |
| --- | --- |
| Res-DuctSeal-PGE-2000 | 0.490 |
| Res-DuctSeal-PGE-2078 | 0.410 |
| Res-DuctSeal-SCE-2502 | 0.410 |
| Res-DuctSeal-SCE-2507 | 0.510 |
| Res-DuctSeal-All | 0.463 |
| Res-DuctSeal-SDG | 0.410 |
| Res-DuctSeal-PGE | 0.584 |
| Res-DuctSeal-SCE | 0.468 |

## Refrigerator/freezer measures normalizing unit modification

*Effective Program Year: 2021.* Historically, the normalizing unit for residential refrigerators/freezers was “Household.” For the DEER2020 update, however, “Area-Ft2” was indicated as the normalizing unit (NormUnit). Since floor area was not the correct normalizing unit—and could have been misinterpreted to allow the unit energy savings (UES) to be multiplied by household floor area—NormUnit was changed to “Household” and no changes were made to the unit energy savings.

## Fuel substitution default NTG applicability clarification

*Effective Program Year: 2020.* The delivery type options for the “FuelSubst-Default” NTG ID were corrected so that this NTG ID is now available for use with fuel substitution measures offered through any delivery type.

## Align residential clothes washer measures with ENERGY STAR® tiers

*Effective Program Year: 2023.* The current ENERGY STAR Version 8.0 clothes washer program requirements became effective February 5, 2018. Only front- and top-loading clothes washers with capacities greater than 1.6 ft3 and less than 8.0 ft3—and are not defined as combination all-in-one washer-dryers, residential clothes washers with heated drying functionality, or top-loading commercial clothes washers—are eligible for ENERGY STAR certification. There are currently no new versions in development.

The Consortium for Energy Efficiency (CEE) specification does not differentiate between top- and front-loading models, while ENERGY STAR does. The CEE specification defines standard sized clothes washers as greater than 2.5 ft3. As of February 5, 2018, top-loading clothes washers meeting ENERGY STAR minimum efficiency requirements would not qualify for any CEE tier.

The equipment efficiencies will be updated as shown in Table A-4‑3.

Table A-4‑3. Residential clothes washer measure criteria, capacity between 1.6-

8.0 ft3

| Category | Efficiency Tier | Minimum IMEF[[54]](#footnote-55) | Maximum IWF[[55]](#footnote-56) |
| --- | --- | --- | --- |
| DEER2023 | DEER2020 | DEER2023 | DEER2020 |
| Front-loading clothes washer | ENERGY STAR/CEE Tier 1 | ≥ 2.76 | ≥ 2.38 | ≤ 3.2 | ≤ 3.7 |
| ENERGY STAR Most Efficient/ CEE Tier 2 | ≥ 2.92 | ≥ 2.74 | ≤ 3.2 | ≤ 3.2 |
| CEE Tier 3 | ≥ 3.10 | ≥ 2.92 | ≤ 3.0 | ≤ 3.2 |
| Code/Standard baseline | > 1.84 | > 1.84 | < 4.7 | < 4.7 |
| Pre-existing baseline | > 1.84 | > 1.79 | < 4.7 | < 4.8 |
| Top-loading clothes washer | ENERGY STAR | ≥ 2.06 | ≥ 2.06 | ≤ 4.3 | ≤ 4.3 |
| CEE Tier 1 | ≥ 2.76 | ≥ 2.06 | ≤ 3.2 | ≤ 4.3 |
| CEE Tier 2 | ≥ 2.92 | ≥ 2.32 | ≤ 3.2 | ≤ 4.0 |
| CEE Tier 3 | ≥ 3.10 | ≥ 2.76 | ≤ 3.0 | ≤ 3.2 |
| Code/Standard baseline | > 1.57 | > 1.29 | < 6.5 | ≤ 8.4 |
| Pre-existing baseline | > 1.29 | > 1.08 | < 8.4 | ≤ 9.4 |

To align existing DEER measures with the applicable standards, the measures shown in Table A-4‑4 will be updated.

Table A-4‑4. Relevant DEER measures for residential clothes washers

| Category | DEER Measure ID | Version |
| --- | --- | --- |
| Front-loading clothes washer | RB-Appl-EffCW-med-Tier1-Front | DEER2020 |
| RB-Appl-EffCW-med-Tier2-Front |
| RB-Appl-EffCW-med-Tier3-Front |
| Top-loading clothes washer | RB-Appl-EffCW-med-Tier1-Top |
| RB-Appl-EffCW-med-Tier2-Top |
| RB-Appl-EffCW-med-Tier3-Top |

## Align residential dishwasher measures with ENERGY STAR® tiers

*Effective Program Year: 2023.* The current ENERGY STAR Version 6.0 dishwasher program requirements became effective January 29, 2016. The CEE revised dishwasher specification from 2015 did not include a Tier 2 due to concerns around cleaning performance. While the ENERGY STAR market share has been reported to be 90 percent among dishwasher products,[[56]](#footnote-57) this finding helped to spur the proposed update to the specification whereby the maximum annual energy consumption (kWh) will decrease. The Environmental Protection Agency (EPA) determined that approximately 15 percent of residential dishwashers qualify for the updated specification.

The Version 7.0 specification is currently under revision, with the first draft published March 10, 2020. For Version 7.0, the EPA has increased the minimum efficiency requirements for residential dishwashers, decreasing the annual energy consumption allowance for standard sized models to 240 kWh/year. According to the EPA, the expected effective date is the first quarter of 2021.

Equipment efficiencies will be updated as shown in Table A-4‑5.

Table A-4‑5. Residential Dishwasher, Standard Capacity Measure Criteria

| MeasureID | Efficiency | Maximum Annual Energy Consumption, kWh |
| --- | --- | --- |
| DEER2023 | DEER2020 |
| Appl-Dishwash-StdSize-Tier1 | ENERGY STAR/CEE Tier 1 | ≤ 240 | ≤ 260 |
| Appl-Dishwash-StdSize-Tier2 | CEE Tier 2 | N/A | ≤ 220 |
| Appl-Dishwash-StdSize-Tier3 | CEE Tier 3 | N/A | ≤ 180 |
| Appl-Dishwash-StdSize-Tier1/2/3 | Code/Standard | ≤ 307 | ≤ 307 |

To align existing DEER measures with the applicable standards, the measures shown in Table A-4‑6 will be updated.

Table A-4‑6. Relevant DEER measures for residential dishwashers

| Category | DEER Measure ID | Version |
| --- | --- | --- |
| Standard size dishwasher | Appl-Dishwash-StdSize-Tier1 | DEER2020 |
| Appl-Dishwash-StdSize-Tier2 |
| Appl-Dishwash-StdSize-Tier3 |
| Appl-Dishwash-StdSize-Tier1/2/3 |

## Whole-house fan measure updates

*Effective Program Year: 2023.* Whole-house fans became a Title-24 code requirement in 2014 for single-family homes in climate zones CZ08 through CZ14. Resolution E-4795 was the most recent update of the whole-house measure resulting in new whole-house fan UES values for DEER2017 and the inclusion of whole-house fans in new construction baseline models in climate zones where they are required by code. The whole house fan is utilized in single-family homes and the eQUEST model for this measure assumes that the whole-house fan is on when outdoor cooling is available, the cooling load can be met by the whole-house fan, and the outdoor temperature is at least five degrees below the cooling thermostat setpoint. The whole-house fan will cool the space down to 70ºF, if possible, regardless of the actual cooling thermostat setpoint.

At the time of the DEER2017 update, a number of changes were needed for the specification of whole-house fan parameters including flow rates, fan power, control sequences, and improvements to the definition and distribution of thermal mass in the residential prototypes. The new whole-house fan measures considered a range of capacities and fan efficiencies. There has been some concern about the accuracy of whole-house fan unit energy savings developed using DOE2-based modeling, particularly because the results are approximately one-third of the CEC-developed savings results[[57]](#footnote-58) used in the publicly-owned utilities’ (POU) 2017 Technical Reference Manual.[[58]](#footnote-59) The CEC-developed savings are modeled using the 2013 version of the California Simulation Engine (CSE) that is the basis for CBECC-Res software. The CEC whole-house fan input assumptions are as follows such that the whole-house fan will:

* turn on if outdoor temperature is at least five degrees cooler than the indoor temperature
* cool the house to a fixed 68°F lower-limit setpoint, consistent with natural ventilation assumptions when the thermostat is in cooling mode
* turn off if the lower setpoint limit is reached, the 5°F minimum indoor-outdoor temperature difference no longer exists, or if the time is between 11 p.m. and 6 a.m. (with windows assumed closed, for security reasons)

The CEC-modeled home used their 2,700 ft2 residential prototype with a whole-house fan airflow rate of 2,000 cfm, so the modeled ventilation rate was 0.74 cfm/ft2. The study noted a 25-percent derating of whole-house fan nominal airflow but provided no explanation for doing so. The study mentioned fan electricity consumption for a ducted economizer-type nighttime ventilation system but did not indicate the fan electricity consumption assumed for whole-house fans.

The DEER assumptions to model whole-house fans are very similar to those used by the CEC, though the lower limit setpoint is 70°F (causing slightly lower cooling savings, but also lowering the heating penalty). The DEER cooling availability schedule varies by climate zone and follows the 2017 T-24 Residential Alternative Compliance Manual (ACM) manual, allowing ventilation cooling only during shoulder months. DEER assumptions do not include a derating of nominal airflow, however it does assume that the windows will only be open half the time when there is an opportunity to use the whole-house fan.[[59]](#footnote-60) This is the only factor used to account for windows open for cooling or airflow and windows closed at night for security reasons. A 2006 survey of ventilation behavior[[60]](#footnote-61) found that 82 percent of respondents thought it was important to open the windows to cool the house and 70 percent thought it was important to open windows to save energy. The study also reported 92 percent of respondents thought it important to close windows for safety/security. The 50-percent probability assumption should be checked by calibrating the simulation results to measured energy savings.

The DEER modeled savings were compared to measured savings from two evaluation studies of whole-house fans installed in California homes. The first study, a 2005 impact evaluation of Northern California Power Agency programs, found annual whole house fan measure savings from 18 homes were 203 kWh +/- 65 kWh.[[61]](#footnote-62) These homes were presumably located in NCPA member areas in climate zones 4, 5, 11, and 12. The analysis method used billing data to report normalized annual consumption (NAC) on a per-home basis and compared consumption pre- and post-retrofit for homes installing exclusively whole house fans. The average savings of the sample with low pre-retrofit NAC (<1,000 kWh/yr) removed is 265 kWh. The annual DEER savings (average of all four PSC motor measures) for climate zones 11 and 12 average 141 kWh with a standard deviation of the 16 models at 53 kWh. The modeled savings are approximately 70% of the measured savings of the overall sample or 53% of the higher NAC portion of the sample.

The second study, a 2003 impact evaluation of the Statewide Low-Income Energy Efficiency (LIEE) Program showed average annual whole house fan measure savings from 88 homes was 108 kWh.[[62]](#footnote-63) Eighty seven of these 88 homes were located in PG&E territory. Since the program installed multiple measures, the cooling end-use saving measures were disaggregated based on engineering models which assigned 20% of the cooling savings to whole house fans. PGE climate zones include primarily CZs 1, 2, 3, 4, 11, 12, 13, and 16. The DEER savings from those climate zones averaged across the old and existing eras are 53 kWh, about half the measured savings. Central valley savings (CZs 11-12-13) are much higher and more closely grouped at 153 Wh. Because this study uses engineering analysis to disaggregate the cooling load into the component measure savings, it is given less weight than the previous study.

Given these studies, it seems that whole house fan measure savings are underestimated by the DEER models, and the assumption with the highest uncertainty is that occupants will open windows half the time when outdoor cooling is available. This assumption will be adjusted, and DEER savings for whole house fans will be re-modeled.

For transparency, the whole-house fan measure input assumptions are documented in Table A-4‑7 and Table A-4‑8.

Table A-4‑7. DEER input parameters for the whole-house fan measure

| Parameter | Parameter name[[63]](#footnote-64) | Pre-existing baseline case value | Measure case value |
| --- | --- | --- | --- |
| Ventilation method | VentMethod | AIR-CHANGE | AIR-CHANGE+FAN |
| Fan ventilation, cfm/sq.ft. | FanVentCFMpSF | 0 | 0.7, 1.5, 2, 3 |
| Ventilation control, °F | VentMaxT | 70 | 70 |
| Ventilation fan power, W/cfm | VentFanWperCFM | 0 | 0.15, 0.125 |

Table A-4‑8. Enabled periods by climate zone for the whole-house fan measure

| **Climate Zone** | **Period 1** | **Period 2** | **Period 3** | **Period 4** | **Period 5** |
| --- | --- | --- | --- | --- | --- |
| **Start** | **End** | **Start** | **End** | **Start** | **End** | **Start** | **End** | **Start** | **End** |
| CZ01 | never enabled |  |  |  |  |  |  |  |  |
| CZ02 | 20-May | 30-Sep | 7-Oct | 21-Oct |  |  |  |  |  |  |
| CZ03 | 22-May | 18-Jun | 1-Jul | 8-Oct | 18-Oct | 24-Oct |  |  |  |  |
| CZ04 | 30-Apr | 3-May | 15-May | 31-Oct |  |  |  |  |  |  |
| CZ05a | 28-May | 28-May | 31-May | 2-Jun | 12-Jun | 13-Jun | 10-Jul | 15-Aug | 29-Aug | 29-Aug |
| CZ06 | 30-Apr | 2-May | 7-May | 6-Nov | 16-Nov | 19-Nov |  |  |  |  |
| CZ07 | 17-Feb | 20-Feb | 25-Apr | 2-May | 13-May | 23-Nov | 18-Dec | 18-Dec | 20-Dec | 25-Dec |
| CZ08 | 18-Mar | 27-Mar | 20-Apr | 21-Apr | 24-Apr | 10-Nov | 15-Nov | 21-Nov | 18-Dec | 23-Dec |
| CZ09 | 17-Mar | 26-Mar | 24-Apr | 7-May | 12-May | 6-Nov | 17-Nov | 22-Nov | 17-Dec | 22-Dec |
| CZ10 | 18-Mar | 25-Mar | 25-Apr | 7-May | 13-May | 6-Nov | 17-Dec | 22-Dec |  |  |
| CZ11 | 28-Apr | 4-May | 15-May | 29-Oct |  |  |  |  |  |  |
| CZ12 | 28-Apr | 4-May | 15-May | 29-Oct |  |  |  |  |  |  |
| CZ13 | 2-Apr | 2-Apr | 26-Apr | 8-May | 12-May | 1-Nov |  |  |  |  |
| CZ14 | 27-Apr | 6-May | 15-May | 30-Oct |  |  |  |  |  |  |
| CZ15b | 14-Jan | 24-Jan | 3-Feb | 9-Feb | 19-Feb | 28-Feb | 14-Mar | 10-Apr | 14-Apr | 24-Nov |
| CZ16 | 24-May | 1-Oct |  |  |  |  |  |  |  |  |

a Climate zone 5 has three additional enabled periods: 3-Sep. to 17-Sep., 30-Sep. to 2-Oct., and 5-Oct. to 12-Oct.

b Climate zone 15 has one additional enabled period: 16-Dec. to 25-Dec.

## Residential gas furnace fan efficiency revision

*Effective Program Year: 2022.* Per the federal Energy Conservation Program for Consumer Products—as of July 3, 2019—new residential furnace fans must be driven by electrically commutated motors (ECMs).[[64]](#footnote-65) Since these have long been a deemed measure in California, those updated for DEER2020 and listed in Table A-4‑9 will be expired as of 2021-12-31. The standard description will be revised as shown beginning 2022-01-01.

Table A-4‑9. Residential furnace measures to be expired

| MeasureID | Standard Description | Measure Description |
| --- | --- | --- |
| Res-GasFurnace-AFUE81-ECM | Through 2021-12-31:Furnace AFUE 80 with Standard Efficiency supply fan motorAs of 2022-01-01:Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 81 with ECM supply fan motor |
| Res-GasFurnace-AFUE90-ECM | Efficient Residential Gas Furnace - AFUE 90 with ECM supply fan motor |
| Res-GasFurnace-AFUE91-ECM | Efficient Residential Gas Furnace - AFUE 91 with ECM supply fan motor |
| Res-GasFurnace-AFUE92-ECM | Efficient Residential Gas Furnace - AFUE 92 with ECM supply fan motor |
| Res-GasFurnace-AFUE93-ECM | Efficient Residential Gas Furnace - AFUE 93 with ECM supply fan motor |
| Res-GasFurnace-AFUE94-ECM | Efficient Residential Gas Furnace - AFUE 94 with ECM supply fan motor |
| Res-GasFurnace-AFUE95-ECM | Efficient Residential Gas Furnace - AFUE 95 with ECM supply fan motor |
| Res-GasFurnace-AFUE96-ECM | Efficient Residential Gas Furnace - AFUE 96 with ECM supply fan motor |
| Res-GasFurnace-AFUE97-ECM | Efficient Residential Gas Furnace - AFUE 97 with ECM supply fan motor |
| Res-GasFurnace-AFUE98-ECM | Efficient Residential Gas Furnace - AFUE 98 with ECM supply fan motor |

## LED commercial lighting measure clarification

*Effective Program Year: N/A.* Almost all LED lighting measures were expired in 2020 due to LED becoming the baseline. Three measures were retained by using a higher-performance LED, as measured in lumens per watt (lm/W). DEER Resolution E-4952 (published in 2018) set the base and measure cases using the Lighting Facts database, a compendium of the majority of LED lighting products available in the marketplace. The bottom tier products set the baseline (concluding that a 100 lm/W TLED base efficacy was appropriate) while the top quartile products set the measure case efficacy. The Lighting Facts database was not updated after 2018 and could no longer be used to set efficacy standards.

After 2018, updates to LED efficacy (for both base and efficient cases) were based on multiple sources, including the Southern California Edison Industry Standard Practice (ISP) Study (October 2019), DesignLights Consortium updates (DLC, the DLC is a compendium of qualifying products that must meet standards of efficacy and quality), and the Department of Energy (DOE) Lighting R&D Opportunities Study (January 2020). Aggregate analysis of these resources and their subsequent revisions resulted in updates to LED efficacies which are exemplified by the TLED baseline efficacy trend of 100, 111, and 128 lm/W in 2019, 2020, and 2021 measure packages, respectively.

After the base updates were made, the measure case efficiencies were similarly adjusted. The updated measure case efficacies were compared to the DLC database and it was observed that about 45 percent of high-bay products qualified. The DLC qualified products are intended to represent the best products in the market and would correspond to the top tier of all products on the market, possibly the top quartile, although that could not be confirmed since the Lighting Facts database no longer exists.

The 2021 measure packages expiration dates were extended to 2022-12-31 (November 3, 2020 disposition) due to the impact of COVID on markets and a conclusion that it would be unlikely that clear market trends would emerge in time to update measure packages for 2022. Program administrators are instructed to submit revised measure packages reflecting revised efficacy assumptions by June 1, 2022 such that those measure packages can become effective January 1, 2023.

# Review of energy efficiency EM&V and special studies

EM&V market sector evaluation results and/or special studies will continue to be some of the primary sources for DEER measure and measure package updates. Evaluation results with sufficient rigor and precision will be used to update DEER and measure package assumptions. Parameters in need of data to reduce uncertainty or increase accuracy will also be identified and fed back into the next EM&V cycle. The current evaluation is focused on program year 2019 (PY2019) claims. Year 2019 is an important milestone for deemed measures and the application of EM&V results because it was the last year for PA-specific measure packages. For PY2020, the use of statewide measure packages for nearly all measures will make application of the EM&V results prospectively much easier.

The DEER team has examined the 2019 EM&V draft impact evaluation reports and other studies to identify findings that may result in updates to deemed measure parameters and/or savings estimation approaches. Additional updates may be made looking across studies for recent years such as looking across measures at the default NTG by delivery type (e.g. direct install, rebate, upstream).

A complete list of the studies to consider is provided in Appendix E of the CPUC’s 2019-2021 EM&V Plan.[[65]](#footnote-66) As for other studies, we only considered studies that were essentially final by April 2021. A summary of the recommended updates to gross unit energy savings (UES), EUL, load shapes and/or net-to-gross (NTG) values resulting from PY2019 impact evaluations is provided in Table A-5‑1.

Table A-5‑1. Assessment of expected 2019 EM&V study results

| Market Sector | Measure | Gross Savings\* | NTG Ratio |
| --- | --- | --- | --- |
| Current | DEER2023\* |
| Residential | Tankless Water Heaters | None | 0.55 | 0.40 |
| Residential | Storage Water Heaters | None | 0.55 | 0.40 |
| Residential | MF Recirc Pump Demand Control | None | 0.55 | 1.00 (DI) |
| Residential | MF Temperature Controller | None | 0.55 | 0.94 (DI) |
| Residential | Smart Controllable Thermostat | UES, LS\*\* | *No change* |
| Lighting | Nonresidential Indoor LED Tube | None | 0.60 | 0.65 |
| Lighting | Nonresidential Indoor LED Fixture | None | 0.91 | 0.65 |
| HVAC-Residential | Fan Motor Control | None | 0.55 | 0.88 |
| HVAC-Residential | Condenser Coil Cleaning | None | 0.65-0.67 | 0.80 |
| Small Commercial | Process Ozone Laundry | UES\*\* | 0.60 | 0.70 |

\*Per E-4952, values are only changed if EM&V studies show a trend and if change is greater than +/- 0.05.

\*\*UES=unit energy savings; LS=load shape; HOU=hours of use; EUL=effective useful life; and VFD=variable frequency drive

## Upstream and midstream program tracking data requirements

*Effective Program Year: 2022-2023.* Commission Staff will address the overarching issue of low installation rates and lowering net to gross values resulting from insufficient tracking data for measure verification and evaluation of upstream and midstream programs. These issues were raised in last year’s DEER Resolution and encountered again for the PY2019 EM&V of Upstream Lighting (PY2017-2019), Upstream HVAC (PY2018-19), and Small/Medium Commercial Measures (PY2018-19).

Currently CEDARS does not require site information for upstream or midstream claims. Starting with 2022 claims, a SiteID will be required for all claims and the upstream exception dropped. Commission Staff expect that the information will include the incentive recipient and not the customer/ratepayer – which will be addressed for 2023. The site data will contain location and contact information for stores, contractors, or other service providers where the ultimate customer purchase occurs.

Starting with 2023, upstream and midstream claims will require additional data on the equipment adding a new table specific for this program type. The new table will include the following information specific to upstream and midstream programs.:

* SiteID
* EquipmentID
* Measure Size category: Small or Large
* Equipment manufacturer
* Equipment model #
* Rated capacity (ref. NormUnit)
* Rated efficiency unit (EfficUnit), e.g., UEF or TE
* Rated efficiency (ref. EfficUnit)
* Quantity per sales transaction or project or site
* FuelSub\_ReplaceType: Confirm replaced units were gas storage water heater, gas furnace, etc. (baseline eligibility requirement)
* AR\_Replace Model #: Proof that the existing equipment is functional and still operating as intended.

Additional information verifying incentives or equipment are installed in ratepayer sites will continue to be required via data requests from Commission staff.

## Updates per residential 2019 EM&V reports

Two residential program evaluation reports for PY2019 were reviewed for potential deemed measure updates: water heating equipment and smart thermostats. The PY2019 evaluation of residential domestic water heating equipment included efficient storage, tankless, and heat pump water heater (HPWH) measures, as well as multifamily central water heating measures and controls. This was primarily a NTG and market-measure characterization study, and it illustrates the complexity of the water heating market caused by the variety of technology/efficiency options. The study also collected residential hot water use information that can potentially be used for a future update to the deemed savings methodology and the DEER water heating calculator. The smart thermostat evaluation continued the effort begun in 2018 to update the previous and dated savings values with values developed from billing analysis.

### Residential water heaters

*Effective Program Year: 2023.* Commission Staff reviewed the 2019 impact evaluation of residential water heaters.[[66]](#footnote-67) Efficient water heaters were offered via plug-load/appliance, multifamily, and general residential energy efficiency programs. The measures evaluated were primarily storage, tankless, and heat pump water heaters (HPWHs) for single family, multifamily and mobile homes, but also targeted multifamily boiler controls. The evaluation explored uncertainties around key savings parameters including installation rate, realization rate, NTG, effective useful life (EUL), and unit energy savings (UES). However, the only updates from the evaluation are NTG values and EUL for one of the technologies as discussed below.

**Natural Gas Storage and Tankless Water Heaters.** The evaluated NTG values for gas tankless water heaters was 0.36 with 90/7 confidence/precision, and for gas storage water heaters was 0.40 with 90/13 confidence-precision. Both of these values are substantially lower than the current value of 0.55 which is the default NTG value for residential measures 2 years and older. Since the NTG values for the two technologies are within the same error band and within the same technology group, it is sensible to use a single value for both measures. Therefore, we direct the use of a NTG value of 0.40 for both storage and tankless natural gas water heaters. This is the actual evaluated NTG value for storage water heaters and a small rounding up of the tankless water heater NTG value.

In addition, evaluation results included the customer-reported ages of failed equipment as presented in Table A-5‑2. The table shows that 78 percent of tankless water heaters failed much earlier than the current 20-year EUL for this measure. A recommendation to reduce the EUL for this measure to 12-15 years was considered but not adopted because these findings are customer self-reports. However, based on these results tankless water heaters should be a priority for future EUL research. The life of a storage water also appears to be longer than the current EUL but only slightly higher.

Table A-5‑2. Customer-reported age of replaced water heaters

| Replaced Unit Type | Sample size | EUL per tracking data | Net to gross (NTG) ratio |
| --- | --- | --- | --- |
| Less than 10 years | 10-15 years | Older than 15 years |
| Natural Gas Storage Water Heater | 738 | 10 | 0.26 | 0.40 | 0.26 |
| Natural Gas Tankless Water Heater | 171 | 20 | 0.36 | 0.42 | 0.17 |
| Heat Pump Water Heater | 9 | 10 | 0.53 | 0.39 | 0.80 |

**Heat Pump Water Heaters (same-fuel).** The 2019 evaluation also included some heat pump water heaters. Although the evaluation produced a NTG of value 0.50 for this measure, the sample was not robust enough and the measures were primarily conventional same-fuel rather than fuel substitution measures. In addition, we anticipate that the 2020 EM&V effort will target fuel-substitution HPWH measures (which have a policy-stipulated NTG value of 1.0) and that the samples and findings will be much more robust. As such, we will not apply these interim findings to HPWH measures.

### Multifamily boiler demand control at recirculation pumps

The results for this measure are labeled as “Recirculation Pump” in the evaluation report. The evaluated NTG value of 1.00 for this measure is an upward adjustment from the current default value of 0.55. The updated NTG value is based on a robust survey sample size of 53 respondents, and. The NTGRs for the multifamily water heater technologies were almost uniformly 100%. This high NTG value is because program incentives do spur multifamily property managers to implement upgrades that they would have otherwise delayed or never undertaken. Multifamily central equipment can usually be repaired almost indefinitely without requiring a replacement or adding new features, and the property manager may be indifferent to system inefficiencies if the tenants pay for energy use either directly or indirectly. This NTG value shows that program awareness and incentives can impact this cycle. Therefore, we direct the use of a NTG value of 1.00 for multifamily direct install boiler demand control recirculation pumps.

### Multifamily hot-water loop temperature controller

The results for this measure are labeled as “Water Heater Boiler Controls” in the evaluation report. The evaluated NTG value of 0.94 for this measure is a significant increase from the current default value of 0.55. The updated NTG recommendation is based on a survey sample size of 48 respondents and has a relative precision of 7.6 percent at 90% confidence. As explained for the previous measure, these high NTG values reflect the unique situation for multifamily properties. Therefore, we direct the use of a NTG value of 0.94 for multifamily direct install hot-water loop temperature controllers.

### Smart Controllable Thermostats

*Effective Program Year: 2022.* Commission staff reviewed the PY2019 Impact Evaluation of Smart Thermostats report.[[67]](#footnote-68) Evaluated parameters include UES, NTG, and load shapes and the evaluation encompassed thermostat installations for direct install and rebate delivery types and all residence types. This evaluation completes the two-part effort begun in 2020 to update the previous dated and PA-specific values with statewide values derived from billing analysis. Only NTG value updates are discussed here because the values are stored in the DEER database. Savings and load shape update guidance will be provided via the measure package process since these values were developed from billing analysis not DEER prototype models.

NTG ratios for both direct install and downstream program SCTs were updated last year: A NTG value of 0.90 is used for direct install and 0.55 is used for downstream-rebate programs. Results from this year validated these values so no NTG updates are needed. NTGR values are not revised if the change is less than 0.05 percentage points and therefore the NTG for D.I. remains at 0.90.UES values and load shapes were also developed this year but because those values are developed from billing analysis not DEER prototypes so any updates will be discussed and directed by disposition as part of the measure package process.

## Updates per nonresidential lighting 2019 EM&V report

*Effective Program Year: 2023.* Commission Staff reviewed the PY2019 impact evaluation of non-residential lighting.[[68]](#footnote-69) Only two of the six measures considered for evaluation—the two that accounted for 90 percent of the savings—were evaluated: Indoor Linear LED Fixtures and Indoor Linear LED Tubes. These measures are offered in and were evaluated for downstream and midstream program delivery types and are still offered in the current PA portfolio as statewide measures.

The PY2019 evaluation is the first opportunity to conduct NTG research of lighting measures with the new LED baselines. The deemed lighting baselines and offerings have continued to increase in efficacy with the benchmark baseline efficacy increasing from 100 lumens per watt (lm/W) in PY2019 to the current assumption of 128 (lm/W). While the underlying assumptions of baseline and offerings have evolved, their relationship to the market has remained consistent and similar attribution is expected, hence the PY2019 evaluation findings are applicable to the current statewide measures.

For LED fixtures, the evaluated NTG values were significantly lower than the current ex ante value of 0.91 established by the previous DEER Resolution E-4952. In Resolution E-4952, lighting fixture baselines were revised to reflect either an all-LED or significantly-LED (small fraction of linear fluorescent), and the 0.91 NTG value was stipulated to reflect this change, and the expected substantial barriers and reduced opportunity for free-riders.[[69]](#footnote-70) For TLEDs, the evaluated NTG values were slightly higher (0.71 and 0.63) than the ex ante default value of 0.60.

2019 EM&V Statewide average NTG results are summarized in Table A-5‑3, which also includes a mapping to the currently active eTRM nonresidential lighting measures. Downstream values are slightly higher than midstream ones, but the entire range is relatively tight. Because the range of values is relatively small and to simplify the NTG implementation while providing a good representative value, we direct the use of a NTG value of 0.65 for both TLED and LED fixtures and for all delivery types.

Table A-5‑3. PY2019 evaluated net-to-gross ratio by nonresidential lighting type

| LightingType | Current StatewideeTRM Measures | Net to gross (NTG) ratio |
| --- | --- | --- |
| Downstream | Midstream |
| Fixtures | SWLG011-03 (LED, High or Low Bay)SWLG012-01 (LED Ambient Fixtures and Retrofit Kits, Commercial) | 0.67 | 0.63 |
| TLEDs | SWLG009-02 (LED, Tube)SWLG018-01 (LED, Tube, Type B and Type C) | 0.71 | 0.63 |

## Updates per HVAC sector 2019 EM&V reports

Commission staff reviewed the PY2019 HVAC Sector Commercial HVAC[[70]](#footnote-71) and Residential HVAC[[71]](#footnote-72) evaluation reports. All measures were reviewed for potential UES and NTG updates. The two Commercial measures were Rooftop and Split Systems and package terminal air conditioner/heat pump (PTAC/PTHP) controls. Neither one of these measures will be updated this cycle. The Rooftop and Split System measure NTG value was updated last year, and this year’s evaluation validated the updated value. And although the PTAC/PTHP Controls measure was being evaluated for the first time, it has since been discontinued and is no longer offered because it is now required by Title 24. The Residential HVAC evaluation covers the package of measures described below.

### Residential HVAC sector 2019 EM&V updates

*Effective Program Year: 2022, 2023.* The Residential HVAC evaluation covered a package of six measures. All measures were reviewed for potential UES and NTG updates. In addition, one of the measures – refrigerant charge adjustment is also immediately impacted by the low-GWP refrigerant report findings. The measures and evaluation results are described in detail below.

**High-Efficiency Furnaces.** The 2019 EM&V results for this upstream program indicated significant issues for both the UES and NTG savings as indicated by the GRR and the NTG values. The evaluated gross savings was 84 percent lower than claimed savings (average GRR of 14%). Ninety percent of the measure claims were wall furnaces and the programs had no way to verify that the furnaces had actually been installed at a customer site due to a lack of tracking information. In addition, for central furnaces the evaluated savings was half of the claimed savings. However, these are tracking data issues rather than UES algorithm issues. The evaluation also found a statewide NTG ratio of 0.28 compared to a claimed average NTG value of 0.60, due primarily to participants indicating they would have installed the same furnace without the program. For reference, the current statewide residential furnace measures use the default residential sector NTG value of 0.55. Because the relative precision of the evaluated NTG value was more than 20 percent the NTG will not be updated, however the evaluation findings indicate significant changes should be considered for the upstream wall furnace program and it should be targeted for EM&V in 2020 to provide a more robust NTG value.

**Fan motor replacement.** This measure was evaluated last year for the PY2018 EM&V cycle and the NTG value was updated to 0.85. The PY2019 evaluated statewide NTG ratio of 0.90 is higher but within 0.05 points of the updated NTG value, so no additional updates will be made. This year’s PY2019 evaluation found GRRs of 27, 29, and 17 percent for kWh, therms, and peak kW respectively, primarily due to interactive effects with measures co-installed with duct sealing measures. Although we do not make any specific recommendations for UES updates, the low GRRs and interaction with other measures should be investigated further and the UES estimates adjusted accordingly.

**Fan motor control.** PY 2019 evaluation results indicated low GRR values of 65 and 63 percent respectively for fan motor control kW and kWh savings. The evaluation also found that this measure is often installed alongside other efficiency measures - such as smart thermostats that may have similar controls - leading to reduced savings due to the interactive effects between these measures. Although specific UES updates cannot be specified, we recommend investigating whether fan controls and smart communicating thermostat fan-delay functionality is redundant, and adjusting UES values, measure offerings, or measure eligibility requirements if needed. The evaluation also found an average electric NTG ratio of 0.88, which is much higher than both the PY2019 average value of 0.65 and the default residential value of 0.55 used by the current statewide eTRM measure.

**Duct testing and sealing.** This measure was also evaluated for last year’s 2018 EM&V cycle, and the NTG ratio was updated to 0.95, so it will not be updated again this year. The PY2019 evaluation, we found GRR values of 33, 25, and 86 percent for kWh, therm, and peak kW respectively. These reductions are primarily due to interactive effects with other measures co-installed with the duct sealing measure. The evaluation again found an NTG ratio of 95 percent, which validates last year’s update.

**Condenser Coil cleaning.** The 2019 EM&V evaluation GRR was 130% percent for kWh and 95 percent for kW. The increased kWh savings is the result of improved cooling capacity and efficiency from improved air flow values from the HVAC3 evaluations compared to PA measure package claims. These results are consistent with previous evaluation efforts that coil cleaning provides a small amount of electrical energy savings. The evaluation also found an average NTG value of about 0.80 (range of 78 to 83 percent) determined from phone and web surveys. This evaluated value is significantly higher than the current residential sector default value of 0.55. The increased higher attribution is a result of the program delivery approach. The programs proactively offer reduced and no cost coil cleaning options to the consumer, and many customers report they would not have done the measure without program intervention. Many respondents (33 percent) even indicated they were unaware of the need for condenser coil cleaning. Therefore, we direct the use of a NTG value of 0.80 for the condenser coil cleaning measure to be revised from the current eTRM value of 0.55.

**Refrigerant Charge Adjustment (RCA).** The evaluation found a 96 percent reduction in savings compared to the claimed savings values. In addition, the simulated impacts of RCA are the smallest of any measure group evaluated. Evaluation NTG values were also relatively high at 84 percent versus the current statewide measure default NTG value of 0.55. However, no additional effort will be made to update either of these values as the measure is expired as per Section 3.7.

## Updates per small\medium commercial 2019 EM&V report

*Effective Program Year: 2023.* Commission staff reviewed the 2019 EM&V report for the 2019 small/medium commercial sector.[[72]](#footnote-73) The four measures selected for evaluation represented the most significant percent of the savings encompassed by this market/sector evaluation group. Results and findings were strongly dependent on the delivery method used (upstream, midstream, downstream, direct install). One of the measures – Agricultural (drip) Irrigation - is no longer offered by PAs so is not discussed in this review. All other measures were reviewed for potential UES and NTG updates and are discussed below.

### Process ozone laundry

This is the first time this measure has been evaluated by the current EM&V team. The UES evaluation indicated several possible changes to the savings calculation should be considered for future updates. One recommendation was that very large-scale and unique projects consider a Custom program approach to maximize site-level savings and ensure the projects are vetted through the program application process. Since very large sites can represent a large fraction of overall program savings, this would also stabilize overall deemed measure results. The second recommendation is to consider using the calculator developed by the evaluation team to estimate savings for the more typical projects like nursing homes. The evaluation team amassed industry knowledge, tools, and experience in assembling the calculator which should be considered for improving the deemed savings calculation. A detailed list of the key parameters and parameter estimates are provided in the report.

The evaluated overall average NTG value was 0.70 versus the PA-specific NTG ratios evaluated for PG&E, SCG and SDG&E of 0.55, 0.79 and 0.73, respectively. The current eTRM Statewide measure uses the commercial default greater than 2 years (Com-Default>2yrs) NTG value of 0.60. Because the evaluated NTG value is in-line with the previous SCG and SDGE NTG values and more than 0.05 points different than the existing eTRM value, we direct the NTG value for the Ozone Laundry measure to be updated from the current value of 0.60 to 0.70.

### Process pump VFD

This measure was evaluated last year for PY2018 EM&V. No UES changes were made but PAs were directed to change the NTG value to 0.40 (from 0.60) for PY2022. For the PY2019 evaluation the evaluated NTG value of 0.34 was lower than last year’s update. However, Commission staff will not update the NTG value again but will continue to monitor for a downward trend. No UES updates will be made either, although the evaluation recommended that an enhanced deemed measure savings algorithm with some site-level customization be incorporated into measure packages. A detailed list of the recommended inputs for the algorithm is provided in the report. The evaluation also found that AMI (advanced metering infrastructure) data was invaluable for considering and analyzing pump operation, but if readily available could also be considered for creating a more realistic measure savings load shape for the measure.

### Commercial tankless water heaters

No updates are recommended for commercial tankless water heater UES parameters or NTG values. This measure was evaluated last year for PY2018 EM&V and no updates were made at that time either. The findings this year were very similar to last year’s: The evaluated NTG value of 0.62 was within 0.05 of the reported NTG ratios of 0.57 (PG&E) and 0.60 (SCG) and the current eTRM measure NTG of 0.60. Regarding possible UES updates, the evaluation did find differences in water temperature and uniform energy factor (UEF) values relative to the measure packages. For example, the evaluation found UEF values of 0.952 (large) and 0.934 (small) compared to the assumed measure package values of 0.90 (PG&E and SCG) and 0.87 (SCG) which would lead to greater energy savings. These discrepancies, however, were more closely related to tracking data improvement issues rather than changes to algorithms.

# Review of codes and standards

The following sections describe updates to DEER measures based on changes to federal and state codes and standards.

## Federal standards for commercial natural-gas packaged boilers

*Effective Program Year: 2023.* Changes to the federal standard, effective January 10, 2023[[73]](#footnote-74) increase the minimum efficiency ratings for all but the very large commercial packaged boilers as shown in Table A-6‑1.

Table A-6‑1. Federal standards update for commercial natural gas packaged boilers

| Equipment | Size Category(input) | Minimum Efficiency[[74]](#footnote-75) |
| --- | --- | --- |
| New | Previous |
| Small Gas-Fired Hot Water Commercial Packaged Boilers | ≥300 kBtu/h and ≤2,500 kBtu/h | 0.84 ET | 0.80 ET |
| Large Gas-Fired Hot Water Commercial Packaged Boilers | >2,500 kBtu/h and ≤10,000 kBtu/h | 0.85 EC | 0.82 EC |
| Very Large Gas-Fired Hot Water Commercial Packaged Boilers | >10,000 kBtu/h | 0.82 EC (no change) |
| Small Gas-Fired Steam Commercial Packaged Boilers | ≥300 kBtu/h and ≤2,500 kBtu/h | 0.81 ET | Natural draft: 0.77 ET All others: 0.79 ET |
| Large Gas-Fired Steam Commercial Packaged Boilers | >2,500 kBtu/h and ≤10,000 kBtu/h | 0.82 ET |
| Very Large Gas-Fired Steam Commercial Packaged Boilers[[75]](#footnote-76) | >10,000 kBtu/h | 0.79 ET  |

As a result, the energy savings for high-efficiency space-heating boilers and instantaneous tankless water heaters are expected to change. Affected DEER Measure IDs are provided in Table A-6‑2.

Table A-6‑2. DEER measures affected by update to federal standards

| Use Category | DEER Measure ID | Version |
| --- | --- | --- |
| SHW | NG-WtrHt-LrgInst-Gas-gt200kBtuh-0p80Et | DEER2014 |
| NG-WtrHt-LrgInst-Gas-gt200kBtuh-0p85Et |
| NG-WtrHt-LrgInst-Gas-gt200kBtuh-0p90Et |
| HVAC | NG-HVAC-Blr-Stm-300to2500kBtuh-81p0Et-Drft | DEER2020 |
| NG-HVAC-Blr-Stm-300to2500kBtuh-82p0Et-Drft |
| NG-HVAC-Blr-Stm-gt2500kBtuh-80p0Et-Drft |
| NG-HVAC-Blr-Stm-gt2500kBtuh-81p0Et-Drft |
| NG-HVAC-Blr-Stm-gt2500kBtuh-82p0Et-Drft |

## Federal standard for residential gas furnace fan

*Effective Program Year: 2022.* As of July 3, 2019, new residential furnace fans must be driven by electrically commutated motors (ECMs) per the federal Energy Conservation Program for Consumer Products.[[76]](#footnote-77) Hence, the baseline for efficient furnace measures will be updated to have fan motors driven by ECMs, as listed in Table A-6‑3.

Table A-6‑3. New residential furnace measures

| MeasureID | Version | Standard Description | Measure Description |
| --- | --- | --- | --- |
| Res-GasFurnace-AFUE90-ECM | DEER2022 | Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 90 with ECM supply fan motor |
| Res-GasFurnace-AFUE91-ECM | DEER2022 | Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 91 with ECM supply fan motor |
| Res-GasFurnace-AFUE92-ECM | DEER2022 | Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 92 with ECM supply fan motor |
| Res-GasFurnace-AFUE93-ECM | DEER2022 | Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 93 with ECM supply fan motor |
| Res-GasFurnace-AFUE94-ECM | DEER2022 | Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 94 with ECM supply fan motor |
| Res-GasFurnace-AFUE95-ECM | DEER2022 | Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 95 with ECM supply fan motor |
| Res-GasFurnace-AFUE96-ECM | DEER2022 | Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 96 with ECM supply fan motor |
| Res-GasFurnace-AFUE97-ECM | DEER2022 | Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 97 with ECM supply fan motor |
| Res-GasFurnace-AFUE98-ECM | DEER2022 | Furnace AFUE 80 with ECM supply fan motor | Efficient Residential Gas Furnace - AFUE 98 with ECM supply fan motor |

## New low global warming potential refrigerant standards

*Effective Program Year: 2022.* In California, greenhouse gas (GHG) emissions from refrigerants in HVAC equipment is the fastest growing global warming pollutant. To address this climate threat, California State Senate Bill (SB) 1383, 2016, calls for the emissions of hydrofluorocarbons (HFCs) to be reduced so that by 2030, California’s HFC emissions will be 40 percent of what they were in 2013 based on GWP impact. California SB 1013, 2018, was passed shortly after SB 1383 to help define the rules and timeline California needs to follow to reach the 2030 HFC emissions reduction goal.[[77]](#footnote-78) While the act’s original timeline has already changed, the latest pending amendment to SB 1013 calls for new stationary AC equipment installed after January 1, 2025 to contain a refrigerant with a 100-year GWP value below 750. Furthermore, under SB 1013, the CPUC and other state regulatory agencies are called upon to assess the operational performance of refrigerants with low-GWPs and to develop a strategy to encourage the adoption of those low-GWP refrigerants in equipment funded by energy efficiency programs overseen by the CPUC.

When SB 1383 was written, it appeared the United States was also planning to phase down the use of HFCs. After the passage of SB 1383, a 2017 US District Court ruling limited the US Environmental Protection Agency’s (EPA) ability to regulate refrigerants based on GWP. The ruling effectively stalled national efforts to transition away from high-GWP refrigerants. Despite this, California is following the goals set by the Montreal Protocol and moving forward with a state-led phasedown of HFCs.

The most recent California Air Resources Board (CARB) proposed amendment to regulations on HFCs will delay the transition timing from 2023 to 2025. Many indications point to updates in the next cycle of California building and fire codes that will include revised policies and guidelines to allow for the use of mildly flammable HFC refrigerants in most major HVAC equipment. Once the building and fire codes are finalized, potentially starting in June or July of 2021, the policy and timing of California’s transition, will be more certain. When the new regulations are in place, the baselines for affected deemed measures containing refrigerant will need to be updated. The 2021 Proposer Defined Study on HVAC Refrigerants, referenced in Section 3.7, provides a roadmap for accelerating the adoption of low-GWP HVAC refrigerants through a literature review and interviews with HVAC refrigerant related experts.[[78]](#footnote-79)

## CEC Title 24 building energy efficiency code updates

*Effective Program Year: 2023.* While the 2022 Building Energy Efficiency Standards have not yet been finalized, listed below are some of the possible changes we anticipate seeing in 2022 Title 24. These changes will need to be incorporated as measures are naturally revised. They will be applicable to the “New” era prototype that will be developed and become effective in the future when newly constructed buildings reflect the 2022 Title 24 code.

* Some of Title 24 equipment efficiencies given in Table 110.2-A through 110.2-K are going to change to match their values with equipment efficiencies given in Table 6.8.1-1 through 6.8.1-16 of 2019 ASHRAE 90.1. For some equipment, efficiency tables in 2019 ASHRAE 90.1 have different requirements before and after 1/1/2023. The new Title 24 will adopt most of them. They include air-cooled air conditioners and heat pumps—both split system and single package—variable-refrigerant flow (VRF) water-source (cooling mode), warm-air furnace (gas-fired and oil-fired), and boiler (hot water and steam), etc.
* 2019 ASHRAE 90.1 includes efficiencies for computer room air conditioners and condensing units and heat-recovery chillers. New Title 24 may include them as well.
* Dedicated outside-air systems (DOAS) units may be included in 2022 Title 24 along with associated efficiency metrics:
	+ Integrated Seasonal Coefficient of Performance (ISCOP)
	+ Integrated Seasonal Moisture Removal Efficiency (ISMRE)
* Occupant-sensor ventilation-control devices
* Some changes expected regarding the airflow rates for demand-control ventilation (DCV)
* Code will define the airflow rate for bathroom and kitchen exhaust fans
* 2018 AMCA 208 defined new fan efficiency metric called fan energy index (FEI) which is the ratio of actual fan efficiency to the baseline fan efficiency (or baseline fan energy to the actual fan energy) while both measured at the same flow and pressure conditions. AMCA introduced this as part of DOE effort and ASHRAE has already adopted the new term. The code will require all fans with nameplate ratings greater than 1 hp to have an FEI greater than or equal to 1.0.
* In line with ASHARE 90.1, the new Title 24 will define the fan power allowance for the calculation of fan power budget. This will include all fan types (supply, return, make-up air, and relief) for all fans exceeding 1 hp.
* Efficiency requirement update expected for high-capacity space-heating gas boiler systems, requiring a minimum thermal efficiency of 90 percent for boilers greater than 1 MMBtu/h of input capacity. This also comes with an additional condition of a maximum heating hot water return temperature (HHWRT) setpoint of 120°F. Service water heating system may have the same requirement.
* Lighting power density (LPD) of some area categories will change and they will be even better than ASHRAE’s latest values. New areas will be added to multi-level lighting control including library, warehouse, parking garages, and staircases.
* Some of the areas that need occupancy-based ventilation control will be controlled with lighting sensors.
* Single family housing updates include:
	+ Dimming control for kitchen and living area lighting
	+ Solar access roof area (SARA) requirement for single family homes
	+ Mandatory requirement for “electric ready building”
* Multifamily housing updates include:
	+ Local mechanical exhaust for kitchen and bathroom. Code will define the minimum airflow rate for kitchen and bathroom exhaust fans along with the capture efficiency (CE) of kitchen range hoods
	+ Demand controlled mechanical exhaust
	+ Community shared solar electric generation system requirement
	+ Energy storage system (ESS) requirement
	+ Electric cooktop and clothes dryer—for all-electric homes
	+ We can expect higher insulation requirements and vapor barrier requirements
	+ Thermostatic requirement for temperature setback and occupancy-controlled ventilation
* Requirement for infiltration testing for envelope and between the floors of commercial building. There are new testing requirements for air barriers.
* New requirement for exhaust air heat recovery for different climate zones. These recovery efficiencies will define the part-load efficiency, i.e., varying recovery efficiency with flowrates.
* New efficiency requirement for CO2-based refrigeration systems. CO2-based refrigeration system will be proposed for refrigerated warehouse and commercial refrigeration.
* New mandatory requirement for Controlled Environment Horticulture (CEH). It will define new metric for dehumidification.
* New mandatory requirement for indoor grow lighting and horticultural lighting and their controls. There will be updated envelope requirements as well.
* Demand response-enabled system requirements will be based upon the minimum connected kW instead of building area.
* Steam traps and compressed air systems will get new requirements.
* Improvement expected for most of the covered processes.

## CEC Title 20 appliance efficiency code updates

No updates are currently anticipated because most Federal appliance and equipment efficiency standard updates were suspended, as noted on the Appliance Standards Awareness Project website.[[79]](#footnote-80) However, if these updates are restarted and fast-tracked, they would be expected to be incorporated into measure revisions for PY 2024-25. There are a significant number (22) of suspended commercial and residential equipment and appliance updates.

# Review of market and research studies

Market and research studies, including baseline studies,[[80]](#footnote-81) are a rich source of update information but are only periodically conducted. These types of studies can be used for calibration of whole site and end use energy use, establishing industry standard and/or best practices, developing operating hours, and developing model prototype characteristics.

## Update EULs based on Group A Effective Useful Live (EUL) study

*Effective Program Year: 2023.* Since an EUL study report by Guidehouse[[81]](#footnote-82) has been finalized, updates to the whole building EULs are anticipated for the DEER2023 update. Those affected are listed in Table A-7‑1 as supported by the report. The whole-building EUL values may be further updated if a related report by Guidehouse about the measure life of building insulation is finalized before the Resolution is voted out.[[82]](#footnote-83)

Table A-7‑1. Updated effective/remaining useful life values for whole-building retrofit

| EUL\_ID | Description | EUL | RUL | Start Date | Expiry Date |
| --- | --- | --- | --- | --- | --- |
| WB-#####-w## (45 IDs) | Varies | 17.7 (avg.) | 5.89 (avg.) | 2013-01-01 | 2022-12-31 |
| WhlBldg-WBInsFen-NEW-MfrHse | SCE: Whole Building new construction manufactured housing building shell improvements | 20.0 | 6.67 | 2013-01-01 | 2022-12-31 |
| WhlBldg-WBInsFen-NEW-SF | SCE: Whole Building new construction single family building shell improvements | 18.0 | 6.00 | 2013-01-01 | 2022-12-31 |
| WhlBldg-WBInsFen-RET-SF | SCE: Whole Building retrofit single family building shell improvements | 14.0 | 4.67 | 2013-01-01 | 2022-12-31 |
| WhlBldg-0-lt25pctElecSvgs | Whole building retrofit with <25 percent electric savings[[83]](#footnote-84) | 10.6a | 3.53 | 2023-01-01 |  |
| WhlBldg-25-lt75pctElecSvgs | Whole building retrofit with 25 to <75 percent electric savings53 | 15.7b | 5.23 | 2023-01-01 |  |
| WhlBldg-75-100pctElecSvgs | Whole building retrofit with ≥75 percent electric savings53 | 15.9c | 5.30 | 2023-01-01 |  |

a If the RUL of building-shell insulation increases to 20 years, this EUL nearly doubles to 19.0 years.

b If the RUL of building-shell insulation increases to 20 years, this EUL increases to 17.7 years.

c If the RUL of building-shell insulation increases to 20 years, this EUL increases slightly to 16.0 years.

# New measure additions

This section describes the addition of two water heating measures: Commercial tankless water heaters and multifamily central water heating systems that will be added to the DEER database for 2022 and 2023, respectively.

## Commercial tankless water heater

*Effective Program Year: 2022.* Given the efficiency improvements that have occurred among large tankless water heaters since 2014, a new measure tier will be generated for 2022 claims having a thermal efficiency of 0.96 (see Table A-8‑1). This will be generated using MASControl2 and the same building prototypes used for the other DEER2014 large tankless water heaters as list in Section 4.2.

Table A-8‑1. New large tankless commercial water heater measure

| DEER Measure ID | Version | Start Date | Thermal Efficiency |
| --- | --- | --- | --- |
| Measure | Standard |
| NG-WtrHt-LrgInst-Gas-gte200kBtuh-lt2G-0p96Et | DEER2022 | 2022-01-01 | 0.96 | 0.80 |

Although SoCalGas has requested permission to scale the UES from the extended MeasureIDs discussed in Section 4.2 for use in 2021 to provide tankless water heaters having a thermal efficiency of 0.96 or higher, further discussion is necessary since extrapolation of DEER UES values is generally disallowed.

## Multifamily central water heating systems

*Effective Program Year: 2023.* There is a need for deemed energy savings for efficient centralized service hot water systems that are typical at some multifamily buildings. These will be generated by first replicating the DEER MFm eQUEST building prototype family in EnergyPlus™ (E+) and then modeling a central hot-water system. While there has been much interest in providing this update as early as PY2022, it is not anticipated that this will be feasible. Efforts will be made to accelerate this priority as much as possible.

# Support table updates

Throughout the year, additions and modifications must be made to the PEAR database. Once the changes to the PEAR database have been adopted via resolution, these additions and modifications are migrated to the Ex Ante database during the month following the resolution adoption. Events that typically trigger additions and modifications to the PEAR database include new IOU measure packages and changes resulting from new CPUC guidance documents and new CPUC policies. As changes are made to the PEAR database, they are announced via the PEAR Change Log.[[84]](#footnote-85) On the following day, all changes to the PEAR database are reflected in CEDARS and in the CPUC Support Tables in the eTRM. The changes in the subsections that follow were made since the adoption of Resolution E-5082 for DEER2023 Update.

## New EUL values

*Effective Program Year: 2020.* EUL and RUL values were added to PEAR as shown in Table A-9‑1.

Table A-9‑1. Effective/remaining useful life values

| EUL\_IDs | Description | EUL | RUL | Start Date |
| --- | --- | --- | --- | --- |
| NonRes-WhlBldg-SEM | Strategic Energy Management (SEM) | 5.0 | 1.67 | 2020-01-01 |
| ComLau-EffCW-Leased | Leased High-efficiency Clothes Washer (CEE Tiers 1,2,3), 5-year min. term | 5.0 | 1.67 | 2020-09-24 |

The first new EUL ID, *NonRes-WhlBldg-SEM*, is consistent with CPUC D.17-09-025 Decision Adopting Energy Efficiency Goals for 2018-2030 and supported by Table 3-26 of the *Energy Efficiency Potential and Goals Study for 2018 and Beyond*.[[85]](#footnote-86) It is being applied retroactively.

The second new EUL ID, *ComLau-EffCW-Leased*, is limited to the 5-year lease term required per the program design; the median lifecycle of a commercial clothes washer is significantly longer than five years.

Additional new EUL IDs are added as indicated in Section 7.1.

## Expired EUL values

*Effective Program Year: 2022-23.* Many of the legacy EUL and RUL values for lighting measures will be expired in PEAR. Only those that are currently in use in approved measure packages will remain. Final lists of non-lighting and lighting EUL\_IDs to be retired are provided in Table A-9‑2 and Table A-9‑3, respectively. These are in addition to those already indicated in Section 7.1.

Table A-9‑2. Expired non-lighting effective useful life (EUL) IDs as of 2021-12-31\*

| Expired non-lighting EUL\_IDs |
| --- |
| Agr-DripIrr | EUC\_6.6 | WB-38962-w10\* |
| Agr-LPSNperm | PGE-EUC-LM005-1975 | WB-41522-w06\* |
| Agr-LPSNport | PGE-EUC-LM005-1985 | WB-43723-w10\* |
| AppPlug-AllEquip-Audio | PGE-EUC-LM005-1996 | WB-43750-w06\* |
| AppPlug-AllEquip-BRDVD | PGE-EUC-LM081-1975 | WB-45456-w10\* |
| AppPlug-DesktopComp | PGE-EUC-LM081-1985 | WB-52042-w09\* |
| AppPlug-TV | PGE-EUC-LM081-1996 | WB-52395-w10\* |
| EnergyPolicyManual-Min | PGE-EUC-LM125-1975 | WB-53613-w10\* |
| EUC\_3.7 | PGE-EUC-LM125-1985 | WB-56139-w10\* |
| EUC\_3.8 | PGE-EUC-LM125-1996 | WB-56999-w08\* |
| EUC\_3.9 | PGE-EUC-LM141-1975 | WB-57634-w10\* |
| EUC\_4.1 | PGE-EUC-LM141-1985 | WB-64074-w06\* |
| EUC\_4.2 | PGE-EUC-LM141-1996 | WB-64187-w08\* |
| EUC\_4.3 | PGE-EUC-LM162-1975 | WB-64721-w10\* |
| EUC\_4.4 | PGE-EUC-LM162-1985 | WB-66984-w10\* |
| EUC\_4.5 | PGE-EUC-LM162-1996 | WB-68399-w10\* |
| EUC\_4.6 | PGE-EUC-LM165-1975 | WB-69986-w08\* |
| EUC\_4.7 | PGE-EUC-LM165-1985 | WB-71850-w09\* |
| EUC\_4.8 | PGE-EUC-LM165-1996 | WB-72848-w10\* |
| EUC\_4.9 | Plug-HiEffCopier | WB-75270-w10\* |
| EUC\_5.1 | Plug-Software | WB-76805-w10\* |
| EUC\_5.2 | Res-Plug-Soundbar | WB-79171-w06\* |
| EUC\_5.3 | WB-13590-w10\* | WB-80419-w06\* |
| EUC\_5.4 | WB-16063-w06\* | WB-81881-w10\* |
| EUC\_5.5 | WB-18288-w06\* | WB-82988-w10\* |
| EUC\_5.6 | WB-18720-w10\* | WB-87309-w10\* |
| EUC\_5.7 | WB-19122-w10\* | WB-87379-w10\* |
| EUC\_5.8 | WB-19550-w10\* | WB-87576-w10\* |
| EUC\_5.9 | WB-20558-w09\* | WB-92396-w10\* |
| EUC\_6 | WB-22378-w10\* | WB-95864-w06\* |
| EUC\_6.1 | WB-26618-w10\* | WB-95984-w10\* |
| EUC\_6.2 | WB-28890-w06\* | WB-98013-w10\* |
| EUC\_6.3 | WB-29480-w08\* | WhlBldg-WBInsFen-NEW-MfrHse |
| EUC\_6.4 | WB-33387-w08\* | WhlBldg-WBInsFen-NEW-SF |

\* Marked whole-building EUL\_IDs will expire as of 2022-12-31 as per Table A-7‑1.

Table A-9‑3. Expired lighting effective useful life (EUL) IDs as of 2021-12-31

| Expired Lighting EUL\_IDs |  |  |
| --- | --- | --- |
| ILtg-CFL-12000hr-Com | ILtg-LED-seas | OLtg-CFLfix-Dusk-to-Dawn |
| ILtg-CFL-12000hr-ResCmn | ILtg-Lfluor-CommArea | OLtg-CFLfix-ResCmnArea |
| ILtg-CFL-6000hr-Com | ILtg-Lfluor-fix | OLtg-HID |
| ILtg-CFL-6000hr-ResCmn | ILtg-Lfluor-Mag | OLtg-HID-Cmn |
| ILtg-CFL-8000hr-Com | ILtg-Lfluor-T12Mag | OLtg-HPS |
| ILtg-CFL-8000hr-ResCmn | ILtg-MH | OLtg-Incand-Com |
| ILtg-CFL-Com | ILtg-T5 | OLtg-Incand-Res |
| ILtg-CFLfix-Com | LtgFixture-Default | OLtg-Incand-Res-Cmn |
| ILtg-CFLfix-Res | OLtg-CFL | OLtg-Induct |
| ILtg-CFLfix-ResCmnArea | OLtg-CFL-12000hr-Res | OLtg-LFluor-CommArea |
| ILtg-CFL-ResCmn | OLtg-CFL-12000hr-Res-Cmn | OLtg-LFluor-Dusk-to-Dawn |
| Iltg-Com-CldCthd-25000hr | OLtg-CFL-6000hr-Res | OLtg-Lfluor-Mag |
| ILtg-HID | OLtg-CFL-6000hr-Res-Cmn | OLtg-LFluor-Res |
| ILtg-HID-Cmn | OLtg-CFL-8000hr-Res | OLtg-MH |
| ILtg-HPS | OLtg-CFL-8000hr-Res-Cmn | OLtg-T5 |
| ILtg-Incand-Com | OLtg-CFL-Cmn | Recreate-LED\_fixt-Res |
| ILtg-Incand-Res | OLtg-CFL-Dusk-to-Dawn |  |
| ILtg-Induct-Elec | OLtg-CFLfix |  |

## New technology type

*Effective Program Year: 2021.* A new DEER database technology type (TechType) was added for commercial heat pump water heaters that are rated using Coefficient of Performance (COP)—*HP\_COP*. This TechType belongs to the pre-existing “WaterHtg-eq” technology group for all water heating equipment.

## New support table fields for refrigerants

*Effective Program Year: 2022-23.* Six new fields are needed for avoided costs of refrigerant leakage calculated using the Refrigerant Avoided Cost Calculator. For PY2022 measures, the calculator must be submitted as an addendum to each approved measure package where the measure and/or baseline technology contains refrigerant. For PY2023—and consistent with direction provided in Section 3.11—fields will need to be added to the eTRM permutations as shown in Table A-9‑4.

Table A-9‑4. New fields for refrigerant NPV avoided costs

| Fieldname | Field description |
| --- | --- |
| RefrigerantNPVBenefitsPreBaseline | NPV avoided costs calculated using the Refrigerant Avoided Cost Calculator for pre-existing baseline equipment |
| RefrigerantNPVBenefitsStdBaseline | NPV avoided costs calculated using the Refrigerant Avoided Cost Calculator for standard baseline equipment |
| RefrigerantNPVBenefitsMea | NPV avoided costs calculated using the Refrigerant Avoided Cost Calculator for installed measure equipment |
| RefrigerantNPVCostsPre Baseline | NPV costs calculated using the Refrigerant Avoided Cost Calculator for pre-existing baseline equipment (should be entered as a positive value) |
| RefrigerantNPVCostsStd Baseline | NPV costs calculated using the Refrigerant Avoided Cost Calculator for standard baseline equipment (should be entered as a positive value) |
| RefrigerantNPVCostsMea | NPV costs calculated using the Refrigerant Avoided Cost Calculator for installed measure equipment (should be entered as a positive value) |

## DEER2008/2011 records added to DEER2022 load shape tables

*Effective Program Year: 2022.* The DEER2008 and DEER2011 electric load shape parameters have been uploaded to the PEAR database. The parameters for the following three natural gas load shapes have been generalized and uploaded to PEAR: Annual, WinterOnly, and SummerOnly.

# APPENDIX I: Assessment of eTRM and Data Source of Record criteria

Resolution E-5082 for the DEER2022 update listed software enhancements needed for the eTRM to meet the Energy Division’s standard for a data source of record for deemed energy efficiency measures. Phase 1 enhancements were designed to meet public user requirements for access to approved deemed values; phase 2 enhancements were designed to meet CPUC user requirements for review of deemed measures, budget filing and program reporting, and evaluation activities. Table A-10‑1 lists both the enhancements and criteria used by the Energy Division in assessing the eTRM’s suitability as the data source of record for phases 1 and 2 in the development process. As of the timing of this public comment draft resolution, the eTRM shared parameter and value tables are updated by a manual process in coordination with the Energy Division and the eTRM developers. By third quarter, the necessary API end points for an automated and seamless nightly synchronization with the ex ante data tables will be installed by the eTRM developers. Therefore, this table reflects a “TBA” status for criteria associated with enhancements underway in the second quarter.

In the tables that follow, “TBA” means that, at the time this resolution is circulating for comment, developers are still working on the enhancement. “TBA (production)” means that the staff working group has reviewed and tested the enhancement in staging, but not in production, at the time that this resolution is circulating for comment. “Yes” means that it meets the requirement.

Table A-10‑1. Phase 1 eTRM enhancements assessment

| Enhancement |
| --- |
| No. | Priority | Criterion | Compliance | Due date[[86]](#footnote-87) |
| 1 | Critical | Data fields added at staff direction to meet the Deemed Data Standard. | SeeTable A-10‑2 | Release 2.2 2021 |
| 2 | Critical | Process (API with specific views designed by the ex ante team for the eTRM) syncs with the Ex Ante tables and updates the eTRM shared tables daily. | TBA | Release 2.2 2021 |
| 3 | Critical | Versioning of shared parameters and value tables occurs at the object (table/parameter) level rather than at the shared data library level. | Yes (staging)TBA (production) | Release 2.2 2021 |
| 4 | Slight | Measure package developers can choose what columns appear (and their order) in the measure characterization when a shared value table is embedded (both shared and measure-specific). | TBA | Release 2.2 2021 |
| 62 | Slight | The measure characterization PDFs contain:- Logical page breaks, where possible (not splitting up object/table names from its host object/table, etc.)- Maintain proportionality and consistency in text style levels (headings) and sizes (esp. static vs. dynamic table headings)- Floated elements retain their size, instead of erroneously expanding to full width in the PDF- All symbols in the measure characterization text and calculations will render correctly in the PDF | Yes (staging)TBA (production) | Release 2.2 2021 |

Table A-10‑2 provides the phase 1 requirements for data fields to include in an eTRM shared parameter/value table and/or a measure permutation table.

Table A-10‑2. Phase 1 data field requirements assessments

| Description | PEAR/ExAnte field | eTRM field | Compliance | Due date[[87]](#footnote-88) |
| --- | --- | --- | --- | --- |
| Measure description | Description | OfferingDesc | Yes | - |
| DEER/Workpaper version | Version | Version | Yes | - |
| First-baseline case description | PreDesc | Existing Description | Yes | - |
| Second-baseline case description | StdDesc | Standard Description | Yes | - |
| Measure case description | MeasDesc | MeasureCase | Yes | - |
| Sector | Sector | Sector | Yes | - |
| Technology Group | TechGroup | TechGroup | Yes | - |
| Technology Type | TechType | TechType | Yes | - |
| End-use category | UseCategory | UseCategory | Yes | - |
| End-use sub-category | UseSubCategory | UseSubCategory | Yes | - |
| Effective useful life ID | EUL\_ID | EUL\_ID | Yes | - |
| Effective useful life, years | EUL\_Yrs | EUL (YR) | Yes | - |
| Remaining useful life ID | RUL\_ID | RUL\_ID | Yes | - |
| Gross savings & installation adjustment factor | GSIA\_ID | GSIA\_ID | Yes | - |
| Net-to-gross ID | NTG\_ID | NTG\_ID | Yes | - |
| Measure Impact Type (MIT) | MeasImpactType | MeasImpactType | Yes | - |
| Start date of measure, etc. | StartDate | Spec\_Measure.EffStartDate | TBA | Release 2.2 2021 |
| Expiration date of measure, etc. | ExpiryDate | Spec\_Measure.Sunset Date | TBA | Release 2.2 2021 |
| Energy impact ID | EnergyImpactID | EnergyImpactID | Yes | - |
| Flag for interactive effects | ApplyIE | IE\_Applicable | Yes | - |
| Interactive effects table | IETableName | IETableName | Yes | - |
| Energy Impact Calculation Type | EnImpCalcType | MeasImpactCalcType | Yes | - |
| First baseline kW savings | APreWBkWAPreEUkW | UnitkW1stBaseline | Yes | - |
| First baseline kWh savings | APreWBkWhAPreEUkWh | UnitkWh1stBaseline | Yes | - |
| First baseline therm savings | APreWBThermAPreEUTherm | Unittherm1stBaseline | Yes | - |
| Second baseline kW savings | AStdWBkWAStdEUkW | UnitkW2ndbaseline | Yes | - |
| Second baseline kWh savings | AStdWBkWhAStdEUkWh | UnitkWh2ndbaseline | Yes | - |
| Second baseline therm savings | AStdWBThermAStdEUTherm | Unittherm2ndbaseline | Yes | - |
| HVAC system type | BldgHVAC | BldgHVAC | Yes | - |
| Climate zone | BldgLoc | BldgLoc | Yes | - |
| Measure Impact Calculation Type for DEER measures | MeasImpactCalcType | MeasureImpact CalculationType | Yes | - |
| Building type | BldgType | BldgType | Yes | - |
| Building vintage bin | BldgVint | BldgVint | Yes | - |
| Delivery method of measure | DeliveryType | Delivtype | Yes | - |
| Electric impact profile ID | ElecImpactProfileID | ElecImpactProfileID | Yes | - |
| Gas impact profile ID | GasImpactProfile ID | GasImpactProfileID | Yes | - |
| Description | Description | MeasureCase | Yes | - |
| Measure application type (MAT) | MeasAppType | MeasAppType | Yes | - |
| Measure Impact Type (MIT) | MeasImpactType | MeasImpactType | Yes | - |
| Normalizing unit | NormUnit | NormUnit | Yes | - |
| Program administrator | PA | PA Type | Yes | - |

Table A-10‑3 provides the phase 2 enhancement requirements that were listed in Resolution E-5082 to improve user experience and meet CPUC requirements. In the second quarter development period of 2021, it became clear to the working group that some priorities had shifted. The group coordinated to update the priorities in E-5082, as listed in the table below. Staff may continue to modify enhancements in coordination with the working group as necessary. Enhancements with an “X” in the “E-5082” column were ordered by Resolution E-5082; those without were later established by staff and the working group to address technical gaps discovered during development. Those enhancements that have no compliance assessment or due date have not yet been scheduled as of the time of this draft resolution; they are expected to be available with Release 2.3 in Q4 2021 or 2.4 in 2022.

Table A-10‑3. Phase 2 eTRM enhancements assessments

| Enhancements |
| --- |
| No. | E-5082 | Priority | Criterion | Compliance | Due date[[88]](#footnote-89) |
| 5 | X | Moderate | CPUC-specific shared data library for DEER measures to support versioned parameters and value tables managed by CPUC and available for eTRM measures to import. Create CPUC-specific workspace to allow for storage and viewing of DEER Measure and Energy data that could be imported into the eTRM Measure. Create template for users who wish to develop a new measure based upon a valid DEER Measure (a DEER measure that has not expired) to be able to import DEER Energy data into the eTRM Measure template for further development of a statewide measure. | Yes (staging)TBA (production) | Release 2.2 2021 |
| 6 | X | Critical | Ability to maximize production system uptime during deployment of enhancements and fixes. Deployments that require system downtime should be deployed outside typical business hours. |  |  |
| 7 | X | N/A | Ability to utilize the staging environment as a User Acceptance Testing platform for all enhancements. |  |  |
| 8 | X | Moderate | Ability to retain independent user profiles between staging and production environments during deployment of enhancements and fixes. | - | Release 2.3 2021 |
| 9 | X | Critical | Ability to deploy enhancements to production environment without compromising existing measures, measure data and user tracking data. |  |  |
| 10 | X | Critical | Ability to roll-back changes in the event of failed deployment, without loss of data. |  |  |
| 11 | X | Moderate | Ability to associate load shapes--either 8,760-hour or compressed format--to measure permutations based on permutation attributes. eTRM should store library of load shapes, which may be associated at the permutation level. Ability to add load profile IDs and finalize at a later time. | - | Release 2.3 2021 |
| 12 | X | N/A | Ability to select any available public field in any order, downloadable as Excel or PDF file. Ability for user to save report format associated with their specific log-in credentials so they can use repeatedly. | - | Release 2.4 2022 |
| 13 | X | N/A | Incorporate interactive report rendering system (e.g., Tableau Public Version) with eTRM. Build presentment into dedicated eTRM page (via iframe) and add Report link to global navigation.  | Yes (staging)TBA (production) | Release 2.2 2021 |
| 14 | X | Slight | Add an extension of notifications available on measure and permutation reports. Any change to the data in the report, where the source is from a commit (NOT a saved draft) would trigger a notification to subscribers. Notifications would be aggregated so that a user only receives one notification per report per day, in the case that someone is committing updates to a measure multiple times in one day. | - | Release 2.3 2021 |
| 15 | X | Moderate | Ability to download master report (flat file) of measure permutations that is not limited to a single measure. | Yes | - |
| 16 | X | Moderate | Developed master report (flat file) of measure permutations that is not limited to a single measure. | Yes | - |
| 17 | X | Critical | Software hard-coded roles and permissions matrix. Roles are categorized into system roles or measure roles. CPUC Roles included. | Yes (staging)TBA (production) | Release 2.2 2021 |
| 18 | X | Critical | Workflows to eTRM for Energy Division ex ante workpaper review, tracking, approval, and value updating functionality.  | Yes (staging)TBA (production) | Release 2.2 2021 |
| 19 | X | Critical | Added functions that support email notifications as a measure changes status and assignee. | Yes (staging)TBA (production) | Release 2.2 2021 |
| 20 | X | Moderate | When Shared Table updates occur, the system will determine which measures are affected and permit the administrator to notify the appropriate parties who have registered for notification when specific measures or measure technology types change. Update notification would be at discretion of administrator. | Yes (staging)TBA (production) | Release 2.2 2021 |
| 21 | X | Critical | Ability for the eTRM to generate a flat-file export that is compatible with the CET measure import specification:--The user shall be able to select measures from an available list--The user should be able to filter the measures based on parameters that define permutations (e.g., Delivery type, MAT)eTRM shall be able to import permutation-level cost-effectiveness values from a flat file that is compatible with CET measure results file specifications:--Values will be loaded and stored at the measure permutation level. | Yes (staging)TBA (production) | Release 2.2 2021 |
| 22 | X | N/A | Develop filters for dashboards that are specific to individual users. The dashboards and filters shall only be viewable by a specific user, as determined by the user’s log-in credentials. as specified. Filters include end use, sector, and delivery type.  | - | Release 2.4 2022 |
| 23 | X | Slight | Update the measure data model to include a new field for delivery type, so that it can be filtered on. Delivery type shall be added to the table of measures on the user's dashboard. | - | Release 2.4 2022 |
| 24 | X | N/A | Allow an editor to sort Value Tables based upon any column (parameter or value) and save that sort to embed that sort into a characterization field. | - | Release 2.4 2022 |
| 25 | X | N/A | Implement the ability for an editor to transpose value tables. This applies to both static (RTE) tables and dynamic (embedded) tables. In the case of an embedded value table, this display configuration only applies to the table in the characterization, and does not affect the underlying value table (located in the Supporting Data page of the measure) | - | Release 2.4 2022 |
| 26 | X | N/A | Design new table styles (to be added to existing "Zebra" and "Plain" table style options). One example new style is a table with smaller font and narrower column widths.Enable measure editors to set a table style to both static (RTE) and dynamic (embedded) tables. | - | Release 2.4 2022 |
| 27 | X | Slight | Implement functions that assign a reference to a value table row.  | Yes | - |
| 28 | X | N/A | Add ability for users to hide columns and rearrange columns based on individual session needs. | - | Release 2.4 2022 |
| 29 | X | N/A | Allow users to save their permutation table preferences for next time (including sorting, filtering, hiding columns, etc.) | - | Release 2.4 2022 |
| 30 | X | N/A | Add capability to show calculated values in value tables | - | Release 2.4 2022 |
| 31 | X | Slight | Support the Boolean type, with TRUE and FALSE displayed/imported/exported instead of 0 and 1. | - | Release 2.4 2022 |
| 32 | X | N/A | Implement enhancement to the equation editing interface to allow editors to type directly into the editing bar (including autocomplete suggestions) without having to click (+) to see the list of terms to choose from. | - | Release 2.4 2022 |
| 33 | X | N/A | When viewing calculations, implement a way to provide insight as to the source of a calculation's variable – which could be a value table, parameter or another calculation – and a link to travel to the object detail page. | - | Release 2.4 2022 |
| 34 | X | N/A | Add capability to have global or imported calculations. Global calculations are calculations that are used in more than one measure.  | - | Release 2.4 2022 |
| 35 | X | N/A | In the configure permutation fields panel, fields that are not mapped will be color-coded so that they are easier to see and correct. | - | Release 2.4 2022 |
| 36 | X | N/A | Pre-map values from shared parameters/shared value tables to data spec field. | - | Release 2.4 2022 |
| 37 | X | N/A | Add capability for users to filter and sort permutation table. When filtered, system would automatically hide the rows that are no longer unique due to missing columns | - | Release 2.4 2022 |
| 38 | X | N/A | Include ability to hide columns of the permutation table that user may consider unnecessary. Column-hiding functionality should also hide duplicate rows if columns being hidden were distinguishing columns to unique permutations | - | Release 2.4 2022 |
| 39 | X | Moderate | In the exclusion table, implement a visual design for exclusion table rows that are NOT excluded (e.g. unchecked), so that they are easier for editors to scan in the table. | - | Release 2.4 2022 |
| 40 | X | Critical | Implement feature that allows range-checking on value tables. An editor would be able to specify a maximum value, minimum value, allowable data type (such as text or number only) and/or "cannot be empty" validation on a value table column. Value table cells that do not meet the validation criteria would be flagged to the measure developer or measure reviewer.--Prior to implementing this feature, ensure that error-checking features to be developed for eTRM are consistent with and at least as robust as the error-checking features for CET and CEDARs.--Note: This does not apply to static (RTE) tables.  | - | Release 2.3 2021 |
| 41 | X | Moderate | Implement text comparison and redlining feature for all measure text fields so textual differences between different versions of a measure are readily apparent. This feature shall allow an editor to compare two versions of a measure, selected by the editor, marked up with differences. | - | Release 2.3 2021 |
| 42 | X | Moderate | Once necessary license with the WebSpellChecker CKeditor plugin is obtained, ensure it is used as the spell-checking source for all rich text fields in the eTRM. | - | Release 2.3 2021 |
| 43 | X | Slight | Reference file download green rectangle element is reduced in footprint for an individual reference and when seen in a long list of references. | Yes | - |
| 44 | X | Slight | Explore adding a drag-to-resize image capability to measure characterization rich text fields. If that solution is not recommended or stable, add up to two new image styles. One desired new style is a small stamp-size image style.  | - | Release 2.4 2022 |
| 45 | X | Moderate | Ability for a reference to be associated with a measure, value table, parameter or calculation by a specific page or table number. This eliminates the need to duplicate references in the reference library. | Yes | - |
| 46 | X | N/A | Add a field to the reference data model for Publication Date. Add a filter to the manage references list that allows filtering by publication date. | - | Release 2.4 2022 |
| 47 | X | N/A | Add "Year" field to search matrix for reference search | - | Release 2.4 2022 |
| 48 | X | N/A | References that have file attachments will display an attachment icon in the manage references list. Implement the ability to filter the manage references list by "has attachment". | - | Release 2.4 2022 |
| 49 | X | N/A | Implement a list of common reference sponsor organizations. When adding or editing a reference, a user can select a sponsor organization from the list or add their own. | - | Release 2.4 2022 |
| 50 | X | N/A | Add an API endpoint that provides a master list of value tables across latest published versions of all measures and including the shared data library. | - | Release 2.4 2022 |
| 51 | X | Moderate | Added API endpoint that provides a master list of permutations across latest published versions of all measures. | Yes | - |
| 52 | X | Slight | Add an API endpoint that provides a master list of all references. The list can be filtered by reference type. | - | Release 2.3 2021 |
| 53 | X | N/A | Include "at a glance" capability for viewing tables without clicking into them (using mouse-over or hover-enabled popup). | - | Release 2.4 2022 |
| 54 | X | Slight | Added pagination selector to all paginated eTRM lists (except panel lists), offering pagination by 25, 50, 100 objects. | Yes | - |
| 55 | X | Slight | Design and implement a new reference detail page.--This reference detail would be viewable through site search, including the ability to include/exclude reference results from the search results list. All references shall be accessible through site search. | - | Release 2.3 2021 |
| 56 | X | N/A | Design and implement a new calculation detail page. Implement the addition of shared value tables, shared parameters and shared calculations being accessible through site search. | - | Release 2.4 2022 |
| 57 | X | N/A | Modify home page to allow view access without login. Such anonymous access would deny user features such as subscriptions, saved preferences, etc., that rely on a registrant's email address. | - | Release 2.4 2022 |
| 58 | X | Critical | Add additional fields to the "Configure permutation fields" panel, "Data spec" tab. | TBA | Release 2.2 2021 |
| 59 | X | Slight | Ability to download the measure characterization PDF separately from the full measure download package. Only the PDF is contained in the download. | Yes | - |
| 60 | X | N/A | Allow ability to perform 8,760-hour array calculations (for example, developing annual carbon impact using hourly values that can be summed over full year), as well as over measure lifetime. | - | Release 2.4 2022 |
| 61 | X | Slight | Add measure name and version number to the characterization PDF file name. | Yes | - |
| 63 | X | Slight | Update parameter .csv files to identify which values from shared parameters are selected for measure. | - | Release 2.4 2022 |
| 64 | X | Slight | Add ≥ and ≤ to the list of available symbols in the rich text editor toolbar. | TBA | Release 2.2 2021 |
| 65 | X | Slight | Applies to site search, measure list, manage measure list. Ensure the statewide measure ID is always displayed next to the measure name when viewing a list of measures. | - | Release 2.3 2021 |
| 66 | X | N/A | Allow ability to calculate Greenhouse Gas impacts using 8,760-hour GHG lookup data and 8,760-hour measure energy savings. | - | Release 2.4 2022 |
| 67 | X | Slight | Reconsider all places where an API name is presented to the user and consider the use of a friendly name instead. If we pursue a friendly name, effort includes:--Ability for users to manage the friendly name--Effort to migrate existing measures to use their friendly name, eliminating the need for Cal TF to update all measures | TBA | Release 2.2 2021 |
| 68 | X | Critical | Provide necessary enhancements to fulfil the CPUC's updated eTRM Workpaper workflow process once it is complete (develop workpaper management backend and front end infrastructure, CPUC user roles, workpaper and parameter-level version control management, integrated communication tools, user interface design, and other requirements as needed). |  |  |
| 69 | X | N/A | Develop infrastructure as needed to ensure CEDARS can eventually use a live eTRM data connected for claims and reporting purposes.  |  |  |
| 70 | X | N/A | Provide the framework that would allow the eventual sunsetting of the PEAR/Ex-Ante database, at which point the CPUC user roles may absorb all administrative permissions |  |  |
| 71 | X | Critical | Develop unanticipated enhancements that the CPUC determines essential within Phase 2 but did not foresee during the publication of this appendix |  |  |
| 72 | X | Moderate | Creation of workpaper space for PAs to submit "Workpaper in Development" with ability for CPUC to provide early feedback on workpapers prior to submittal. |  |  |
| 73 | X | Moderate | Add ability for the eTRM to generate a workpaper revision history by parameter | - | Release 2.3 2021 |
| 74 | X | Critical | Create a dedicated schema on the server where views for all of the shared tables that will be read by CEDARS can be created, stored and modified. Provide assistance on how to make the 21 existing views work with the JSON tables, which includes the two new tables for ‘source\_status’ and ‘Measure’. | - | Release 2.3 2021 |
| 75 | X | N/A | Ability for PAs to assign their measure/solution codes to eTRM measures and permutations | TBA | Release 2.2 2021 |
| 100 |  | Slight | Ability to download Multi-measure CET import file | TBA | Release 2.2 2021 |
| 101 |  | Critical | Ability for a CPUC Administrator to Add/Change a “Sunset Date” for a published measure (that does not change the version). Part of this would be to append a line of text in the “Change Description” field. | Yes | - |
| 102 |  | Slight | PDF direct download - improve user experience | - | Release 2.4 2022 |
| 103 |  | Critical | Auto-sync CPUC Support Tables to Shared Data Library | TBA | Release 2.2 2021 |
| 104 |  | N/A | #51, Unique field validation | - | Release 2.4 2022 |
| 105 |  | N/A | #47, Ability to note that a health warning has been checked | - | Release 2.4 2022 |
| 106 |  | Slight | #46, Data health warning should identify not just that a difference exists, but also that it affects this measure. | - | Release 2.4 2022 |
| 107 |  | Moderate | #45, Dashboard should include your measure role | - | Release 2.4 2022 |
| 108 |  | N/A | #44, Update API-Single measure to match other API endpoints | TBA | Release 2.2 2021 |
| 109 |  | Slight | #43, Information indicating shared objects have changed should be viewable by limited group | - | Release 2.4 2022 |
| 110 |  | Critical | #42, Measure's Version History panel presents start/end dates | - | Release 2.4 2022 |
| 111 |  | Critical | #41, Default view of measure should be the active measure | - | Release 2.4 2022 |
| 112 |  | Critical | CPUC would like eTRM to offer the following reports:1. A report of measure log entries (report for CPUC team would only include CPUC viewable items and report for measure development would only include utility viewable items)2. Weekly digest (high priority)3. Workpaper status report (high priority)4. Monthly workpaper submission plan | - | Release 2.3 2021 |
| 113 |  | Critical | Repurpose the measure data spec field Workbook Excel file for the workpaper cover sheet. This field will work like the current Workbook Excel File measure field and allow the following file types. Repurpose the measure data spec field Characterization source file for the workpaper plan. This field will work like the current Characterization source file measure field and allow the following file types. .doc .docx .pdf | TBA | Release 2.2 2021 |
| 114 |  | Critical | Implement the ability for a user to assign a measure to another user. When a measure is assigned to a user, they will receive an email notification. | - | Release 2.3 2021 |
| 115 |  | Critical | Ability to attach files to measure log entry. A user who has permission to view the log entry may download the file attachment. Ability to filter the measure log listing by "has attachment". This feature does not refer to the current workpaper package (attachment of workpaper references, cover sheet, or measure characterization).Implement the ability for a user to assign a measure to another user. When a measure is assigned to a user, they will receive an email notification. | TBA | Release 2.2 2021 |
| 116 |  | Moderate | Implement the ability for a user to assign a measure to another user. When a measure is assigned to a user, they will receive an email notification.  | - | Release 2.4 2022 |
| 117 |  | N/A | (merged with 115)  | -  | - |
| 118 |  | Moderate | The CPUC/EAR team desires a dashboard that would show all measures in the CPUC review workflow. Dashboard contents to be determined by CPUC/EAR team, but could include:● Measures in CPUC review: - Hyperlinks to latest draft - Measure status - List of measure contributors - Last log entry● Hyperlinks to CPUC status reports - Weekly digest - Workpaper submission status - Others, TBD | - | Release 2.3 2021 |
| 119 |  | Moderate | A user with appropriate permissions will be able to take assignment of a measure, create a draft, and insert comments directly into the measure characterization. Additional stakeholder input will determine if ability to insert comments to value tables and calculations is needed.● Comment feature similar to Word – user and timestamp of each comment, ability for multiple replies● Comments will not be shown when version is published● All comments will be viewable and retained in draft versions● Comments will be viewable by any user with a measure contributor role (i.e., measure development and CPUC review will be able to see comments/replies) | - | Release 2.3 2021 |
| 120 |  | Slight | Workflow - Assignment restriction | Deleted | - |
| 121 |  | b. Moderate | Workflow - Status transitions / Additional emails | - | Release 2.4 2022 |
| 122 |  | Critical | Workflow - Measure log notifications / Daily digest (Measure log notifications; now notifications are instantaneous; this will provide the option to have an option to have a daily notification instead) | - | Release 2.3 2021 |
| 123 |  | N/A | Increase the number of measures returned per call to “Measures” method; we need all eTRM measures  | - | Release 2.3 2021 |
| 124 |  | Slight | Provide a method to get the current, active, published version by measure ID, without specifying a version number (this will be important if users are not permitted to select older versions) | - | Release 2.3 2021 |
| 125 |  | N/A | Provide a single method to get all shared data versions, parameters, and value tables; alternatively, provide a method to get all measure parameters and value tables, like the “Measure Package” download in the eTRM UI | - | Release 2.3 2021 |
| 126 |  | N/A | Provide filtered access to measure permutations; this is a critical update to avoid serious and unnecessary performance problems | - | Release 2.3 2021 |
| 127 |  | N/A | Ability to improve the application performance.  (in Sprint 6) | TBA | Release 2.2 2021 |
| 128 |  | Critical | Limit the edit permissions of start date and end date fields to CPUC administrator  | - | Release 2.4 2022 |
| 129 |  | Moderate | Rename “sunset date” to “end date”  | - | Release 2.4 2022 |
| 130 |  | Critical | Require that a version is committed when it is submitted to the CPUC Review workflow (i.e., when a measure status is changed to “Submitted”)  | - | Release 2.4 2022 |
| 131 |  | Slight | Add a pop up to verify action when a user changes status to “Submitted to CPUC”, "Resubmitted to CPUC", “POU Ready”, “CPUC Approval”, “Cancelled” to confirm that’s what they really want to do   | - | Release 2.4 2022 |
| 132 |  | Moderate | Add a pop up to verify action when a user chooses to make a measure log entry “open” to confirm that’s what they really want to do  | - | Release 2.4 2022 |
| 133 |  | Slight | Add the date that measure status changed to "Submitted to CPUC" in the right-hand detail panel, below "Last Status Change" | - | Release 2.4 2022 |
| 134 |  | Slight | Add the last date that measure status changed to "Resubmitted to CPUC" in the right-hand detail panel, below "Last Status Change"? (below Submitted to CPUC date as per #6) | - | Release 2.4 2022 |
| 135 |  | Critical | Rename Measure Packet to Measure Package (as per OMBU: This would be a global change to the measure UI, so the sidebar of all measure versions would read Measure Package instead of Packet. If this work is approved, then we will audit the system for any use of the word “packet” to make sure no references sneak through.) | TBA | Release 2.2 2021 |
| 136 |  | Slight | Add list of measure contributors (name, role) to the measure log at a glance | - | Release 2.4 2022 |
| 137 |  | Moderate | Limit publishing to only be available when a measure is in "POU Ready" or "CPUC Approved” status | - | Release 2.4 2022 |
| 138 |  | N/A | Send the user an email when they are assigned a measure contributor role | - | Release 2.4 2022 |
| 139 |  | Slight | Allow selection of multiple attributes for table column filtering | - | Release 2.4 2022 |
| 140 |  | Critical | Display SW ID (and version if applicable) with measure name in all eTRM views (exception is user-configured tables) | - | Release 2.4 2022 |
| 141 |  | Critical | Sync staging test environment with production ("live") application data to enable validation of data. | TBA | Release 2.2 2021 |
| 142 |  | N/A | API to allow PAs to upload implementation data into the PA workspace. | - | Release 2.4 2022 |
| 143 |  | Critical | Ability for users to select measures and filter by permutations for use in CET. This feature will limit output to 100,000 records for at least one measure. | - | Release 2.4 2022 |
| 144 |  | Slight | Ability for System Admin or CPUC Admin to modify fields without changing the Source Description (e.g., measure package ID + version.sub-version) | - | Release 2.42022 |

Table A-10‑4 reiterates the phase 2 requirements that were established in Resolution E-5082 and the status of the eTRM’s compliance.

Table A-10‑4. Phase 2 data field requirements assessments

| Description | PEAR/ExAnte field | eTRM field | Compliance | Due date |
| --- | --- | --- | --- | --- |
| DEER Measure ID | MeasureID | DEER Measure IDS | Yes | - |
| HVAC system type description | BldgHVACDesc | Description | Yes | - |
| Climate zone description | BldgLocDesc | Description | Yes | - |
| Building type description | BldgTypeDesc | Description | Yes | - |
| Building vintage bin description | BldgVintDesc | Description | Yes | - |
| Coincident demand factor | CDF | CDF | Yes | - |
| Flag for values available for claims reporting | ClaimSpec |   | TBA | Release 2.2 2021 |
| Date record created | Created |   | TBA | Release 2.2 2021 |
| Record creator | CreatedBy |   | TBA | Release 2.2 2021 |
| Record documentation source | CreatedCitation |   | TBA | Release 2.2 2021 |
| Default equivalent full-load hours | defEFLH | Default EFLH (HR/YEAR) | Yes | - |
| Delivery type description | DeliveryTypeDesc | Description | Yes | - |
| NTG ID description | Desc | Description | Yes | - |
| Energy Impact Profile | EnergyImpactProfile | Electric Impact Profile ID | Yes | - |
| Interactive effects factor for kW savings | IE\_kW | IEkW (Ratio) | Yes | - |
| Interactive effects factor for kWh savings | IE\_kWh | IEkWh (Ratio) | Yes | - |
| Interactive effects factor for therm savings | IE\_therm | IETherm (Ratio) | Yes | - |
| Flag for values available for percent filing | FilingSpec |   | TBA | Release 2.2 2021 |
| Notice of planned studies | FutureComment |   | TBA | Release 2.2 2021 |
| Gas impact profile | GasImpactProfile | Gas Impact Profile ID | Yes | - |
| Gross savings & installation adjustment type | GSIAType | GSIA-BLDG Type | Yes | - |
| Gross savings & installation adjustment type description | GSIATypeDesc | Description | Yes | - |
| Gross savings & installation adjustment factor | GSIAValue | GSIA (Ratio) | Yes | - |
| Hours of use | HOU |   | TBA | Release 2.2 2021 |
| Hours of use categories | HOU\_cat | Hours-of-Use Category | Yes | - |
| Flag indicating DEER building type | IsDEERBldg |   | TBA | Release 2.2 2021 |
| Proposed content flag (not yet approved) | IsProposed | PROPOSED FLAG | Yes | - |
| Date of last modification to record | LastMod |   | TBA | Release 2.2 2021 |
| Party last modified record | LastModBy |   | TBA | Release 2.2 2021 |
| Supporting documentation for last modification to record | LastModCitation |   | TBA | Release 2.2 2021 |
| Comment regarding last modification to record | LastModComment |   | TBA | Release 2.2 2021 |
| Lighting category | LightingType | Lighting Types | Yes | - |
| Measure Application type (MAT) description | MeasAppTypeDesc | Description | Yes | - |
| Measure impact calculation Type description for DEER measures | MeasImpactCalcDesc | Description | Yes | - |
| Normalizing unit description | NormUnitDesc | Description | Yes | - |
| NTG ratio for electric savings | NTG\_Elec | NTGRkWh (Ratio) | Yes | - |
| NTG ratio for gas savings | NTG\_Gas | NTGRTherm (Ratio) | Yes | - |
| Flag for building type parent | ParentType |   | TBA | Release 2.2 2021 |
| Workpaper revision number | revision |   | TBA | Release 2.2 2021 |
| Remaining useful life value, years | RUL\_Yrs | RUL Years (YR) | Yes | - |
| Sector description | SectorDesc | Description | Yes | - |
| End-use sub-category | SubUseCategory | Use Sub-Category | Yes | - |
| Technology group description | TechGroupDesc | Description | Yes | - |
| Technology type description | TechTypeDesc | Description | Yes | - |
| Technology type name | TechTypeName | Technology Type | Yes | - |
| End-use category description | UseCategoryDesc | Description | Yes | - |
| End-use sub-category description | UseSubCategoryDesc | Description | Yes | - |

New enhancements identified during phase 1 and 2 development have been added to the scope of work for an additional production release, 2.4, in 2022, as described in Table A-10‑5.

Table A-10‑5. Phase 3 enhancements for release 2.4 in 2022

| Number | Description |
| --- | --- |
| 200 | Eliminate timeout issues when generating/exporting shared value tables |
| 201 | Eliminate timeout issues when exporting permutation tables |
| 202 | Enable multiple-parameter filtering in shared value tables |
| 203 | Create table for electric generalized load shape parameters in the CPUC Support Table area that is equivalent to the *currentbp.costeff.LoadShapeElec\_2022* table in the PEAR database. If a companion shared object is generated, this will be synchronized on a nightly basis with the version in the CPUC Support Table area. |
| 204 | Create table for natural gas generalized load shape parameters in the CPUC Support Table area that is equivalent to the *currentbp.costeff.LoadShapeGas\_2022* table in the PEAR database. If a companion shared object is generated, this will be synchronized on a nightly basis with the version in the CPUC Support Table area. |
| 205 | Create a VersionSource parameter object to supplement the Version table in the CPUC Support Table. This table provides more resolution than the records in the Version table. This will need to be synchronized on a nightly basis with the VersionSource table in the CPUC Support Table area. |

Table A-10‑6 lists the acceptance criteria that will be used by the Energy Division for data performance (API), data integrity, and system performance prior to the production release of each new eTRM version. More requirements may emerge as needs arise and best practices dictate.

Table A-10‑6. Acceptance criteria for system performance

| Number | Category | Acceptance Criteria |
| --- | --- | --- |
| 300 | User experience | No page will take more than three seconds to load |
| 301 | User experience | Users will not encounter time outs during page loading or data downloads |
| 302 | User experience | Emails providing data exports will be transmitted within 5 minutes of request |
| 303 | Data integrity | Data validation: 100% agreement of contents of EAD tables for approved workpapers and permutations |
| 304 | Data integrity | Data validation: 100% agreement between Shared Data tables and CPUC Support tables |
| 305 | Data integrity | The application ensures data quality and consistency |
| 306 | Member security | Email address and password storage meet industry standards. Passwords are never stored in plain text. Industry standard password hashing algorithms are to be used at all times.  |
| 307 | Site reliability | The site will be available at all times during the work week (Monday-Friday, between 8 a.m. and 6 p.m.). Site down time occurring outside of the work week will be limited to brief pre-announced windows.  |
| 308 | Site security | Only current software and dependencies that are actively being security patched are used by the application.  |
| 309 | Site security | All site permissions (system and user) follow the principle of least privilege.  |
| 310 | System performance | Application and database performance will not limit the development of features.  |
| 311 | Acceptance testing | When requested by the test team, production data are synced to the staging environment as new features are deployed to staging for testing. |

1. <https://docs.cpuc.ca.gov/SearchRes.aspx?docformat=ALL&docid=385864616> [↑](#footnote-ref-2)
2. See Main Menu > DEER Versions > DEER2023 on [http://DEEResources.com](http://deeresources.com/) [↑](#footnote-ref-3)
3. D.15-10-28, at 80, states “D.12-05-015 allowed additional mid-cycle changes if there are new state and federal codes and standards that affect DEER values. Specifically, the decision stated in Conclusion of Law 84: “We generally agree with parties’ request that ex ante values should be adopted and held constant throughout the portfolio cycle. However, mid-cycle updates of ex ante values are warranted if newly adopted codes or standards take effect during the cycle.” [↑](#footnote-ref-4)
4. D.15-10-28, at 80, quotes from D.12-05-015: “Conclusion of Law 80 states: ‘Our Staff should have significant latitude in performing DEER and other policy oversight functions and, absent specific directives to the contrary, should not be required to consult with or otherwise utilize any other groups to perform this work.” [↑](#footnote-ref-5)
5. <https://www.caetrm.com> [↑](#footnote-ref-6)
6. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M346/K161/346161639.PDF> [↑](#footnote-ref-7)
7. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M232/K459/232459122.PDF> [↑](#footnote-ref-8)
8. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M179/K264/179264220.PDF> [↑](#footnote-ref-9)
9. The Scoping Document was posted on March 30, 2021 and located at:

[https://pda.energydataweb.com/#!/documents/2490/view](https://pda.energydataweb.com/%23%21/documents/2490/view) [↑](#footnote-ref-10)
10. Supporting material is available under the Main Menu > DEER Versions > DEER2023 at <http://deeresources.com/index.php/deer-versions/deer2023> [↑](#footnote-ref-11)
11. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M346/K161/346161639.PDF>, at 8. [↑](#footnote-ref-12)
12. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M346/K161/346161639.PDF>, at 85. [↑](#footnote-ref-13)
13. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M346/K161/346161639.PDF>, at 100. [↑](#footnote-ref-14)
14. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M346/K161/346161639.PDF>, at 103. [↑](#footnote-ref-15)
15. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M346/K161/346161639.PDF>, at 106. [↑](#footnote-ref-16)
16. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M346/K161/346161639.PDF>, at 85. [↑](#footnote-ref-17)
17. <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M346/K161/346161639.PDF>, at 11. [↑](#footnote-ref-18)
18. <https://docs.cpuc.ca.gov/SearchRes.aspx?docformat=ALL&docid=385864616> [↑](#footnote-ref-19)
19. <https://docs.cpuc.ca.gov/SearchRes.aspx?docformat=ALL&docid=385864616> [↑](#footnote-ref-20)
20. For any remaining DEER and non-DEER measures. [↑](#footnote-ref-21)
21. “Solicitation for Comments on Scope of Update for Database of Energy Efficiency Resources for program year 2023 (DEER2023) and error corrections for program years 2021 and 2022”, March 30, 2021, [https://pda.energydataweb.com/api/downloads/2490/DEER2023 Scoping Document\_FINAL.pdf](https://pda.energydataweb.com/api/downloads/2490/DEER2023%20Scoping%20Document_FINAL.pdf). [↑](#footnote-ref-22)
22. “A Roadmap for Accelerating the Adoption of Low-Global Warming Potential HVAC Refrigerants,” by DNV GL for CPUC, May 3, 2021. (<https://pda.energydataweb.com/#!/documents/2506/view>) [↑](#footnote-ref-23)
23. The GSIA is a DEER adjustment factor that combines the Realization Rate and Installation Rate (CPUC Energy Efficiency Policy Manual). Note that for CEDARS claims, the reported deemed measure realization rate (RR) is always 1, and for custom projects the reported installation rate (IR) is always 1. [↑](#footnote-ref-24)
24. <https://www.govinfo.gov/content/pkg/FR-2020-01-10/pdf/2019-26356.pdf> [↑](#footnote-ref-25)
25. [https://pda.energydataweb.com/#!/documents/2490/view](https://pda.energydataweb.com/%23%21/documents/2490/view) [↑](#footnote-ref-26)
26. <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M378/K256/378256443.PDF> [↑](#footnote-ref-27)
27. Update of California weather files for use in utility energy efficiency programs and building energy standard compliance calculations, 2020. <https://tinyurl.com/5akf9s2t> [↑](#footnote-ref-28)
28. <https://pda.energydataweb.com/api/view/2280/Weather%20webinar%20CALEE2018%207-12-2019.pptx> [↑](#footnote-ref-29)
29. <http://deeresources.com/index.php/mascontrol3-resources> [↑](#footnote-ref-30)
30. EER represents the energy efficiency ratio at full-load conditions. [↑](#footnote-ref-31)
31. “DEER2014-Codes and Standards Update for the 2013-14 Cycle,” February 11, 2014, <http://deeresources.com/files/DEER2013codeUpdate/download/DEER2014UpdateDocumentation_2-12-2014.pdf> [↑](#footnote-ref-32)
32. CPUC Energy Efficiency Policy Manual, version 6, April 2020, pg. 36. [↑](#footnote-ref-33)
33. Resolution E-4952, October 11, 2018. <http://www.deeresources.com/files/DEER2020/download/Resolution%20E-4952.PDF> [↑](#footnote-ref-34)
34. <http://www.deeresources.com/index.php/deer-load-shape> [↑](#footnote-ref-35)
35. At this time, limited avoided cost “combo” processing ability requires that load shapes are prioritized based on percent of overall claims in recent years. [↑](#footnote-ref-36)
36. <https://www.cpuc.ca.gov/uploadedfiles/cpuc_public_website/content/utilities_and_industries/energy_-_electricity_and_natural_gas/eepolicymanualv5forpdf.pdf> [↑](#footnote-ref-37)
37. <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M378/K256/378256443.PDF>, p. 58. [↑](#footnote-ref-38)
38. <https://www.cpuc.ca.gov/general.aspx?id=5267> [↑](#footnote-ref-39)
39. “Proposer Defined Study. A Roadmap for Accelerating the Adoption of Low-Global Warming Potential HVAC Refrigerants,” for CPUC by DNV GL, May 3, 2021, p. 8, [https://pda.energydataweb.com/#!/documents/2506/view](https://pda.energydataweb.com/%23%21/documents/2506/view). [↑](#footnote-ref-40)
40. “Early Retirement Using Preponderance of Evidence” (also Resolution E 4818, p. 24) <http://www.cpuc.ca.gov/WorkArea/DownloadAsset.aspx?id=5325>. [↑](#footnote-ref-41)
41. Resolution E-4818, Section 1.3.6.2 Add-On Equipment, pp. 26-27. [↑](#footnote-ref-42)
42. The GSIA is a DEER adjustment factor that combines the Realization Rate and Installation Rate (CPUC Energy Efficiency Policy Manual). Note that for CEDARS claims, the reported deemed measure realization rate (RR) is always 1, and for custom projects the reported installation rate (IR) is always 1. [↑](#footnote-ref-43)
43. PG&E Customized Energy Efficiency Policy & Programs Rulebook version 1.0 (2016), p. 16. [↑](#footnote-ref-44)
44. Resolution E-4818, Table 1, p. 4. (See <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M179/K264/179264220.PDF>.) [↑](#footnote-ref-45)
45. Ibid. [↑](#footnote-ref-46)
46. There are a few deemed measure packages for which above-standard/code savings are disallowed in some instances (e.g., SCE17LG097.2, SWLG009-01, and SWCR004-01). [↑](#footnote-ref-47)
47. The cost effectiveness tool (CET) calculates the accelerated replacement cost (ARC) from the full measure cost and the incremental measure cost entered in the 1st and 2nd baseline cost fields respectively. [↑](#footnote-ref-48)
48. Resolution E-4818, Table 1, p. 4. (See <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M179/K264/179264220.PDF>.) [↑](#footnote-ref-49)
49. The standard/code baseline uses the incremental measure cost. [↑](#footnote-ref-50)
50. The pre-existing baseline uses the full measure cost. [↑](#footnote-ref-51)
51. Two cost values are entered for AR measures, both the full measure cost and the incremental measure cost. [↑](#footnote-ref-52)
52. Two efficiency compliance paths are available for chillers. Path A is used for single-speed chillers designed primarily to run at full load and Path B is used for variable speed chillers designed to operate primarily at part load. For example, for a <150-ton air-cooled chiller, Path A efficiency minimums are 10.1 EER/12.7 IPLV and Path B efficiency minimums are 9.7 EER/15.8 IPLV. The DEER tier 1 Path B air-cooled chiller minimum efficiency is (9.7)x(1.07)=10.38 EER and (15.8)x(1.12)=17.7 IPLV. [↑](#footnote-ref-53)
53. The gross savings and installation adjustment (GSIA) is a DEER adjustment factor that combines the realization rate and installation rate according to the Energy Efficiency Policy Manual Version 6, p. 39. [↑](#footnote-ref-54)
54. Integrated modified energy factor (IMEF) is the energy performance metric for ENERGY STAR-certified residential clothes washers as of March 7, 2015. [↑](#footnote-ref-55)
55. Integrated water factor (IWF) is the water performance metric for ENERGY STAR-certified residential clothes washers as of March 7, 2015. [↑](#footnote-ref-56)
56. ENERGY STAR Program Requirements Product Specification for Residential Dishwashers, Eligibility Criteria, Draft 1 Version 7.0. <https://www.energystar.gov/sites/default/files/ENERGY%20STAR%20Residential%20Dishwasher%20Version%207.0%20Draft%201%20Sepcification.pdf> [↑](#footnote-ref-57)
57. Night Ventilation Cooling Compliance Option, Codes and Standards Enhancement Initiative, September 2011. [↑](#footnote-ref-58)
58. 2017 Savings Estimation POU Technical Reference Manual published by the California Municipal Utilities Association. [↑](#footnote-ref-59)
59. The probability fraction is set to 100% on peak kW days for accuracy of peak savings calculations. [↑](#footnote-ref-60)
60. Price, Phillip and Max Sherman. Ventilation Behavior and Household Characteristics in New California Houses, LBNL #59620, 2006. [↑](#footnote-ref-61)
61. Mowris, Robert. Measurement and Verification Load Impact Study for NCPA SB5X Miscellaneous Rebate Programs, 2005. (M&V\_Load\_Impact\_Study\_for\_NCPA\_SB5X\_Miscellaneous.pdf at <http://calmac.org/results.asp?flag=&searchtext=NCPA+SB5X+Miscellaneous&Submit=Search>) [↑](#footnote-ref-62)
62. KEMA-Xenergy. Impact Evaluation of the 2001 Statewide Low Income Energy Efficiency (LIEE) Program, 2003. [↑](#footnote-ref-63)
63. DOE2 Key words are documented in Volume 2 Dictionary file; specifically, VENT-METHOD is described on pg. 442. <https://doe2.com/Download/DOE-23/DOE23Vol2-Dictionary_50d.pdf> [↑](#footnote-ref-64)
64. https://www.energy.gov/sites/prod/files/2014/06/f17/furnace\_fans\_final\_rule.pdf [↑](#footnote-ref-65)
65. ”Energy Division & Program Administrator Energy Efficiency Evaluation, Measurement and Verification Plan FINAL, 2019-2021, Version 10,” California Public Utilities Commission, 12/30/2020, <https://pda.energydataweb.com/api/downloads/2462/2019-21_EMV_Plan_final.pdf>. [↑](#footnote-ref-66)
66. "Impact Evaluation of Water Heating Measures – Final, Residential Sector - Program Year 2019, EM&V Group A", California Public Utilities Commission, 4/21/2021. [https://pda.energydataweb.com/api/downloads/2503/CPUC Group A Report Water Heating PY 2019\_final\_PDA.pdf](https://pda.energydataweb.com/api/downloads/2503/CPUC%20Group%20A%20Report%20Water%20Heating%20PY%202019_final_PDA.pdf) [↑](#footnote-ref-67)
67. "Impact Evaluation of Smart Thermostats - Draft Residential Sector Program Year 2019, EM&V Group A", California Public Utilities Commission, 3/23/2021. https://pda.energydataweb.com/api/downloads/2487/CPUC Group A Residential SCT draft Report\_PDA.pdf [↑](#footnote-ref-68)
68. “CPUC Group A Lighting Sector: PY 2019 Nonresidential Deemed Lighting Impact Evaluation Final Report,” 3/26/2021, [https://pda.energydataweb.com/#!/documents/2489/view](https://pda.energydataweb.com/%23%21/documents/2489/view). “Final Impact Evaluation, NonResidential Lighting Sector Program Year 2019”, 3/26/2021, https://pda.energydataweb.com/api/downloads/2489/PY2019\_NonresLgtImpact\_FinalRpt.pdf [↑](#footnote-ref-69)
69. “2018 Disposition Update for High and Low Bay LED Fixtures based on resubmission of measure package PGECOLTG178 Revision 3 in response to a 2017 Phase Disposition”, May 7, 2018. [↑](#footnote-ref-70)
70. “Impact Evaluation Draft Report Commercial HVAC Sector, Program Year 2019”, 3/12/2021. <https://pda.energydataweb.com/api/downloads/2483/CPUC> Group A Commercial HVAC Impact Evaluation Report PY2019 Draft for PDA (1).pdf [↑](#footnote-ref-71)
71. “Impact Evaluation Draft Report Residential HVAC Sector, Program Year 2019”, 3/17/2021. <https://pda.energydataweb.com/api/downloads/2484/CPUC> Group A Residential HVAC Impact Evaluation Report PY2019 Draft for PDA.pdf [↑](#footnote-ref-72)
72. “Final Impact Evaluation, Small/Medium Commercial Sector PY2019”, 3/30/2021, https://pda.energydataweb.com/api/downloads/2488/\_\_\_SmCom\_Full\_4Posting.pdf [↑](#footnote-ref-73)
73. Table I.1, CFR §431.87 at <https://www.govinfo.gov/content/pkg/FR-2020-01-10/pdf/2019-26356.pdf>. [↑](#footnote-ref-74)
74. ET means “thermal efficiency;” EC means “combustion efficiency.” [↑](#footnote-ref-75)
75. Prior to March 2, 2022, for natural draft very large gas-fired steam commercial packaged boilers, a minimum thermal efficiency level of 0.77 is permitted and meets Federal energy conservation standards for commercial packaged boilers. [↑](#footnote-ref-76)
76. <https://www.energy.gov/sites/prod/files/2014/06/f17/furnace_fans_final_rule.pdf> [↑](#footnote-ref-77)
77. <https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201720180SB1013> [↑](#footnote-ref-78)
78. <https://appliance-standards.org/products-and-links> [↑](#footnote-ref-79)
79. <https://appliance-standards.org/products-and-links> [↑](#footnote-ref-80)
80. For example, CEC’s Commercial End-Use Survey (CEUS) and Residential Appliance Saturation Study (RASS), and CPUC’s Commercial Saturation Study-Commercial Market Share Tracking (CSS-CMST) studies and California Lighting and Appliance Saturation Study (CLASS). [↑](#footnote-ref-81)
81. “EMV Group A, Deliverable 16 EUL Research – Residential Whole Building Retrofits, Final Report,” by Guidehouse, for CPUC, June 3, 2021. (See [https://pda.energydataweb.com/#!/documents/2512/view](https://pda.energydataweb.com/%23%21/documents/2512/view).) [↑](#footnote-ref-82)
82. “EMV Group A, Deliverable 16 EUL Research – Residential Attic, Floor, and Wall Insulation, Draft Report,” by Guidehouse, for CPUC, April 2021. [↑](#footnote-ref-83)
83. Conversion factors used to determine proportion of electric savings: 1 kWh=3.412 kBtu and 1 therm=100 kBtu [↑](#footnote-ref-84)
84. Available at <http://www.deeresources.com/files/deerchangelog/pearchangelog.html>. [↑](#footnote-ref-85)
85. Navigant*. Energy Efficiency Potential and Goals Study for 2018 and Beyond*, 2017, p. 73. [↑](#footnote-ref-86)
86. We anticipate the implementation of these enhancements to be complete by the release of eTRM v2.2 on July 19, 2021. [↑](#footnote-ref-87)
87. Due dates are only shown for future or incomplete data additions. We anticipate the addition of these data fields to be complete by the release of eTRM v2.2 on July 19, 2021. [↑](#footnote-ref-88)
88. Due dates are only shown for future or incomplete enhancements. [↑](#footnote-ref-89)