

**APPENDIX B**  
Energization Target Reporting  
Template Requirements

**General Requirements: The large electric investor-owned utilities should retain all reported underlying application-related information to support CPUC led evaluation, provide all data through Excel spreadsheets that include the associated formulas, and clearly provide all assumptions applied to generate the data requested below.**

**Data Required by AB 50 / SB 410**

1. The average, median, and standard deviation time (in business days and calendar days) between receiving an application and energizing the electrical service.
2. The average, median, and standard deviation time (in business days and calendar days) for each step of the energization process, both within and outside of the utility's direct control.
  1. If applicable, identify the steps and the total timing of the energization process that were performed concurrently.
3. The average, median, and standard deviation time (in business days and calendar days) for each project within the following capacity request categories: <1MW, 1MW-2MW, >2MW.
4. The percentage of energization projects deemed complete annually (Jan. 1 – Dec. 31).
5. The percentage of energization projects meeting the adopted average and maximum energization targets, annually (Jan. 1- Dec. 31)
6. Explanations for energization time periods that exceed the average and maximum energization targets.
7. Constraints and obstacles to each type of energization, including funding limitations, qualified staffing availability, or equipment availability.
8. The total number of different end-use project types requesting service.
9. If the energization project is located within a Disadvantaged Community, Underserved Community, and/or Tribal Community.

**General Data**

10. The total number of energization service requests received (annually), broken down by requested end-use (i.e., single-family residential, multi-unit dwelling, small commercial, electric vehicle charging, etc.).

The total number of energization service requests that were approved to start the energization process (annually), broken down by requested end-use (i.e., single-family residential, multi-unit dwelling, small commercial, electric vehicle charging, etc.).
11. The total number of energization projects that were completed (annually), broken down by requested end-use (i.e., single-family residential, multi-unit dwelling, small commercial, electric vehicle charging, etc.).
12. Total number of applications that did not result in viable utility-side energization infrastructure deployments and why (description of why does not need to be per application, but a list of all reasons why in a given year).
13. On a per site/project basis, the total number of days (business and calendar) between a customer's service request and when the facility is energized, and the total number of days (business and calendar) for each step of the energization process as adopted in R.24-01-018,

including description of the days in which the IOU is waiting for the AHJ, customer, or other non-utility responsibility.

1. Where applicable, identify the steps that were performed concurrently, and total time to complete the step.
14. On a per site/project basis, whether it is located in a disadvantaged community (DAC), another designated underserved community location (if so, which), or neither.
15. Identification of any constraints to infrastructure deployment including, but not limited to, materials, staffing, permitting, need for upstream distribution capacity upgrade, etc.
16. Project specific data reflecting the timing for the utility to complete the eight steps of the energization process that are deemed to be within the utilities' direct control.
17. Project specific data reflecting the timing for the customer/third party, to complete each of the eight steps of the energization process that are deemed to be outside of the utilities' direct control.
18. An aggregated summary of the average, standard deviation, and maximum for the utility to complete each of the eight steps of the energization process that are deemed to be within the utilities' direct control.
19. An aggregated summary of the average, standard deviation, and maximum for the customer/third party to complete each of the eight steps of the energization process that are deemed to be outside of the utilities' control.
20. On a per site/project basis, the customer's requested energization date at the time of the application's approval.
21. Explain any time the customer's requested energization date changed throughout the energization process, the difference between the customer's requested energization date and the final energization date, and when available, an explanation for why the date was changed.
22. On a per site/project basis, the total site capacity (kW) at the time of the customer's application for service and the total site capacity (kW) requested as new or upgraded service.
23. On a per-site/project basis, how much, if any, additional capacity (kW) was installed for future electric load deployment.
24. On a per site/project basis, whether customers chose to install additional capacity to support the applicant's anticipated future load growth. When feasible, provide the timing for when the customer(s) anticipate the additional capacity to be necessary, and the total additional kW capacity of any necessary future upgrade, as listed on the customer's application.
25. If full energization of the applicant's site was not feasible in a timely manner, explain whether any load management or flexible service options were installed or utilized to provide the applicant with timely service.
26. On a per site/project basis, the amount of load (kW) that was provided to the applicant using flexible service options, the remaining (or total) load requested by the applicant, and an estimate for when full service will be provided to the applicant.
27. On a per site/project basis, for the 5% (or less) of projects that exceed the maximum energization target within a 12-month period (Jan. 1 – Dec. 31), provide the requested end-use, capacity requested, location (to the circuit level), application target date versus actual

completion date, an explanation of the delay (permitting challenges, etc.), and alternate approach and/or remedial actions which can be implemented in future projects.

**Tariff Project Data**

28. Total number of sites requesting energization service through Electric Rule 16 (only).
29. Total number of sites requesting energization service through Electric Rule 29/45 (only).
30. Total number of sites requesting energization service through Electric Rule 15 (only).
31. Total number of sites requesting energization service through both Electric Rule 15 and 16.
32. Total number of sites requesting energization service through both Electric Rule 15 and 29/45.
33. On a per site/project basis, the timing between identifying the need for an Electric Rule 15 upgrade and an Electric Rule 16/29/45 upgrade.
34. On a per site/project basis, the timing between when planning and construction work for an Electric Rule 15 upgrade started and when planning and construction work for an Electric Rule 16/29/45 upgrade started.
35. On a per site/project basis, for both Rule 15 and 16, provide whether the customer elected to take on any typically IOU-completed scope and vice versa.
36. Please provide separate responses for Questions 28 through 35 for overhead and underground projects.
37. On a per site/project basis, whether any steps in the energization process were performed concurrently.
  1. If so, identify which steps occurred concurrently and the time necessary to complete the concurrent work.
38. On a per site/project basis, whether the project was delayed due to a customer requested site design or change in project scope.
  1. Identify when in the energization process the customer requested a change in the design or scope of the project.
39. On a per site/project basis, whether the project triggered the need for an upstream capacity project.
  1. Note if the project was delayed or cancelled by the customer after the upstream capacity upgrade need was identified.
40. On a per site/project basis for all tariff projects, whether the site/project is located in a disadvantaged community (DAC), underserved community, and/or tribal community.
41. Customer Desired Energization date broken down by customer type.

**Non-Tariff Project Data**

42. Total number of main panel upgrades completed.
43. On a per site/project basis, the size of the installed main panel upgrade (Amps).
44. On a per site/project basis, the timing (business days and calendar days) to complete a main panel upgrade.

45. On a per site/project basis, whether the scheduled installation of a main panel upgrade was canceled and/or rescheduled.
  1. Provide a reason for why the upgrade was canceled and/or rescheduled.
46. On a per site/project basis, the additional amount of time (business days and calendar days) between the initial schedule to install a main panel upgrade and the rescheduled date.
47. On a per site/project basis, whether the site/project is located in a disadvantage community (DAC), underserved community, and/or tribal community.

**Upstream Capacity Project Data**

48. Whether the site triggered an upstream capacity upgrade necessary to meet the new or upgraded customer energization request.
49. Customer Desired Energization date broken down by customer type.

**Cost Data**

50. Total staffing, labor, and material costs (capital and expense) on a per site/project basis, as defined by energization request type defined in Section 7, Table 1 of this decision, Average Energization Targets effective September 2024.
51. Site/project specific costs (capital and expense) broken out by all equipment the large electric IOU is responsible for covering for each type of upstream capacity projects, Electric Rule 15, Electric Rule 16, and Electric Rule 29/45, and main panel upgrade.
52. Site-specific/project-specific costs (capital and expense) for anything else the large electric IOU covers.
  1. List out the specific items that are not explicitly scoped as the large electric IOU-responsibility for Electric Rule 15/16/29/45.
53. Total construction and overhead costs for each site/project.
54. Total customer allowance cost for each site/project.
  1. Total cost exceeding customer allowance for each site/project.
55. Difference between the forecasted construction and overhead costs for each site/project and the actual costs at the time of energization.
56. Total cost associated with completing all energization requests (Electric Rules and upstream distribution capacity projects) annually (Jan. 1 – Dec. 31).

**(END OF APPENDIX B)**