

APPENDIX A

Electric Utilities New Reporting Requirements Established by D.XX-XX-XXX

A P P E N D I X A**Electric Utilities New Reporting Requirements Established by this Decision**

Reporting Requirements per Section 5				
Row #	Reporting Requirement	Entities Responsible	Reporting Deadline	Reporting Format
1	Final device/technology evaluation report, when a utility (1) terminates the evaluation process for an isolating or non-isolating device or technology without approving the device or technology for deployment, or (2) when a product has been in the evaluation process for more than six months and both the utility and the supplier have agreed that progress toward completing the evaluation has ceased.	PG&E, SCE, and SDG&E		Informational report filed to docket card and service lists of R.19-01-011 and R.19-09-009, and sent to Energy Division Staff at energydivisioncentralfiles@cpuc.ca.gov and buildingdecarb@cpuc.ca.gov
2	Notification that a device or technology has received	PG&E, SCE, and SDG&E	Within 10 business days of the device or	Send to Energy Division at energydivisioncentralfiles@cpuc.ca.gov and buildingdecarb@cpuc.ca.gov

Reporting Requirements per Section 5				
Row #	Reporting Requirement	Entities Responsible	Reporting Deadline	Reporting Format
	approval for deployment, or a change in approval status, and that the utility has updated their website to include this newly approved device and change in approval status.		technology approval	
3	Timelines for meter socket adapter installations (see below for specific reporting criteria)	PGE, SCE, and SDG&E	Annually, beginning April 15, 2026, reporting on the previous year's installations.	Tier 1 Advice Letter
4	Response to the questions posed in Section 5.2.3 about peak demand data.	All electric utilities	Within 90 days of the issuance of this decision	Tier 1 Advice Letter

The following information is added to Resolution E-5105 reporting requirements, all of which shall be submitted via an informational Tier 1 Advice Letter by April 15, 2026, and annually each April 15 thereafter. For applications receiving common facility cost treatment, this reporting requirement shall automatically sunset after the last report following exhaustion of the authorized funds for service line upsizing. However, this reporting requirement shall continue for all other new service line installations and existing service line upsizing or replacement projects. Electric utilities may request a copy of the reporting requirement below in csv format from Energy Division staff.

Reporting Requirements per Section 4.2		
Instructions and Definitions:		
General Notes	<p>The data required in this spreadsheet shall be included with the reporting requirements established under Resolution E-5105 of the same proceeding, and shall be reported by all electric IOUs, including SMJUs. Reporting fields related to common facility cost treatment are only applicable to large electric IOUs, and shall automatically sunset after the last report following exhaustion of the authorized funds for service line upsizing or after the fourth report on April 15, 2030, whichever comes first. However, this reporting requirement shall continue for all other new service line installations and existing service line upsizing or replacement projects.</p> <p><u>CPUC attorneys and Energy Division staff shall be the final authority in determining confidentiality status of any required data, as governed by existing laws and regulations.</u></p>	
Definitions	Under-resourced customer	<p>The definition of an under-resourced customer shall be by reference to the program that the customer is participating in, and will thus differ from program to program. If a customer is a participant of any under-resourced, low income, or equity-based program, or combination of programs, as a result of which the customer's premise undergoes full electrification and capping of prior gas service, then that customer shall be considered an under-resourced customer. These programs may include, but are not limited to The Equitable Building Decarbonization program, the HEEHRA program, the TECH Initiative, the ESA program, etc. Please refer to Section 4.2 of today's decision for full context.</p>

Reporting Requirements per Section 4.2		
Instructions and Definitions:		
	Program	A Program means any collective public service initiative including but not limited to those overseen, managed, or led by utilities, Community Choice Aggregators (CCAs), local governments, Regional Energy Networks (RENs), state or federal agencies, non-profit organizations, or community-based organizations, with the general purpose of making a positive impact towards reducing climate change caused from building energy use. These would typically include, but are not limited to, initiatives that support building electrification or fuel substitution, distributed renewable generation and onsite storage, and building electric efficiency. Gas efficiency programs do not qualify as an eligible Program under this definition.
	Multi-family	Any premise with two or more dwelling units shall be considered multifamily for this reporting
	Small Business	A non-residential metered service customer who (1) has an annual electricity usage equal to or less than 40,000 kilowatt-hours (kWh), or whose demand is equal to or less than 20kW, or (2) is a self-certified "Microbusiness" as per California Government Code Section 14837(d)(2), which defines "Microbusiness" as a small business which, together with affiliates, has average annual gross receipts of five million dollars (\$5,000,000) or less over the previous three years, or is a manufacturer, as defined in subdivision (c), with 25 or fewer employees.

Reporting Requirements per Section 4.2		
Instructions and Definitions:		
	Service Point Climate Zone	Use CEC Climate Zones , same as what was required in Resolution E-5105 reporting
	USPS-standardized Service Address	An address that has been standardized to United States Postal Service address format. See https://postalpro.usps.com/address-quality
	Project Identifier (project ID #)	As reported in compliance reporting required under CPUC Energization proceeding: R.24-01-018
	Meter ID#	Unique number assigned to every utility meter. This field shall only be reported in the confidential version sent to CPUC staff via secure file transfer

Reporting Requirements per Section 4.2			
Common Facility Cost Treatment and Service Upsize Reporting (Service Territory/ [Large Electric IOUs only])			
Reporting for Calendar Year: 20xx	Amount (\$)		
Total Funds remaining (including prior year rollover, if any)	\$		
Prior year rollover, if any	\$		
Funds allocated by end of reporting calendar year	Single-family	Small Business	Multi-family
Funds disbursed by end of reporting calendar year	Single-family	Small Business	Multi-family

Reporting Requirements per Section 4.2	
Common Facility Cost Treatment and Service Upsize Reporting (Project-level)	
Reporting Field	Example Text
USPS-Standardized Service Address	1234 JEFFERSON CT SACRAMENTO CA 95691-4882
Meter ID# (Confidential version only)	[Meter ID]
Project Identifier # (project ID #) (see instructions)	[Project ID assigned by IOU]
Service Address Climate Zone	12
Initial Application Submittal Date	3/14/2025
Application Approval Date	4/30/2025
Site work Completion date	6/4/2025
Service Restart date	6/20/2025
Utility existing service capacity (at the time of initial application) (amp)	60 or 40-60 amp
Customer existing electrical panel capacity (at the time of initial application) (for Multi-family, specify dwelling units' subpanel capacity, or range, if more than one size)	60
Utility Installed Electrical Service Capacity	200
Customer Installed electrical panel capacity	200
Were full utility costs ratebased? (Y/N)	Y
Is customer a participant of any income-based electrification program? (Y/N)	Y
Name of Program/s that the customer has participated in for electrification	Equitable Building Decarbonization Direct Install
Year the customer enrolled in program (if participant in more than one program, provide the last enrolled)	2025
Has the premise fully electrified after service upsizing? (Y/N)	Y
Premise Type: Small Business, Single-family, or Multi-family	Single-family
Number of Interconnecting Service Lines (for Multi-family only)	E.g., 2

Reporting Requirements per Section 4.2	
Common Facility Cost Treatment and Service Upsize Reporting (Project-level)	
Reporting Field	Example Text
Number of dwelling units within property (for Multi-family only)	E.g., 120
Subsidy received from Common facility cost treatment policy (\$s)	E.g., \$8,343.00
Rule 16 Allowance received (\$s)	E.g., \$2,500
Customer-paid Utility Costs (\$s)	E.g., \$0.00
Reason/s that made the project costs > \$10,000, if applicable	E.g., 1 NA E.g., 2 Existing Overground lines were undergrounded E.g., 3 Unexpected trenching costs due to Bedrock/soil condition/(utilities can create categories for commonly occurring conditions in their territory)
Measure1 that triggered the need for service upsizing, as noted in application (e.g., solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	HVAC
Measure2 that triggered the need for service upsizing, as noted in application (e.g., solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	Water Heater
Measure3 that triggered the need for service upsizing, as noted in application (e.g., solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	Electric Cooktop
Measure4 that triggered the need for service upsizing, as noted in application (e.g., solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	NA

Reporting Requirements per Section 4.2	
Common Facility Cost Treatment and Service Upsize Reporting (Project-level)	
Reporting Field	Example Text
Measure5 that triggered the need for service upsizing, as noted in application (e.g., solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	NA
Measure6 that triggered the need for service upsizing, as noted in application (e.g., solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	NA
Did the customer consider (self-attestation) alternates to service upsizing such as smart splitters, power control devices, Meter Socket Adapters, and alternative load calculation methods? (Y/N)	Y

Reporting Requirements per Section 5.3.2, Meter Socket Adapter Installation Timelines	
Instructions and Definitions Tab:	
General Notes	This annual reporting shall be submitted annually before April 15 and shall be included with the reporting requirements established under Resolution E-5105 of R.19-01-011.

Reporting Requirements per Section 5.3.2, Meter Socket Adapter Installation Timelines	
Individual Premise Information	
Reporting Field	Example Text
USPS-Standardized Service Address	1234 JEFFERSON CT SACRAMENTO CA 95691-4882
MSA Type (Isolating or Non-Isolating)	Non-Isolating
Initial Application for MSA Installation Submittal Date	3/14/2025
MSA Installation Application Completion and Approval Date	4/30/2025
MSA Installation date	6/4/2025
Utility existing service capacity (amp)	60
Customer existing electrical panel capacity (amp)	60
Premise Type: Small Business, Single-family, or Multi-family	Single-family

(END OF APPENDIX A)