

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, Ordering Paragraphs 9, 17 and 19				
<u>Row #</u>	Reporting Requirement	Entities Responsible	Reporting Deadline	Reporting Format
<u>1</u>	Final <u>device/ technology evaluation report</u> for all non-isolating devices that have been approved, not approved, or for which, when <u>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</u>	Electric utilities <u>PG &E, SCE, and suppliers</u> <u>SDG&E</u>	No later than 60 days after the evaluation process of the device has concluded.	Informational filing to the <u>report filed to docket card and</u> service lists of R.19-01-011 and R.19-09-009, and <u>sent to</u> Energy Division at <u>energydivisioncentralfiles@cpuc.ca.gov</u> Staff at <u>energydivisioncentralfiles@cpuc.ca.gov and buildingdecarb@cpuc.ca.gov</u>

Reporting Requirements per Section 5, Ordering Paragraphs 9, 17 and 19				
<u>Row #</u>	Reporting Requirement	Entities Responsible	Reporting Deadline	Reporting Format
	<u>agreed that progress toward completing the evaluation has ceased.</u>			
<u>2</u>	<u>Notification that a device or technology has received 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.</u>	<u>PG&E, SCE, and SDG&E</u>	<u>Within 10 business days of the device or technology approval</u>	<u>Send to Energy Division at energydivisioncentralfiles@cpuc.ca.gov and buildingdecarb@cpuc.ca.gov</u>
<u>3</u>	Progress on evaluation activities for the last reporting period and expected evaluation activities for the upcoming reporting period (see Section 5.3.3 for	Electric utilities <u>PG E, SCE, and SDG&E</u>	For 2025 and 2026 calendar years, every 3 months starting <u>Annually, beginning April 15, 2025. 2026,</u>	Tier 1 Advice Letter

Reporting Requirements per Section 5, Ordering Paragraphs 9, 17 and 19				
<u>Row #</u>	Reporting Requirement	Entities Responsible	Reporting Deadline	Reporting Format
	further detail <u>Timelines for meter socket adapter installations (see below for specific reporting criteria):</u>		<u>reporting on the previous year's installations.</u> Starting 2027, annually on January 15, until funds have been fully expended.	
<u>4</u>	Response to the questions posed in Section 5.2.3 about peak demand data.	Electric <u>All electric</u> utilities	Within 90 days of the passage <u>issuance</u> 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. ~~This~~ 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 4.3<u>4.2</u> Ordering Paragraphs 6, 7 and 28 for Common Facility Cost Treatment		
Instructions and Definitions Tab:		
General Notes	<p>This annual<u>The</u> data reporting is required per D.23-12-037, Ordering Paragraph 8, in the Building Decarbonization proceeding R.19-01-011. Compliance deadline for all data reporting is April 15 annually. The date required in this spreadsheet shall be included with the reporting requirements established under Resolution E-5105 of the same proceeding. This reporting requirement, 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. <u>However, this reporting requirement shall continue for all other new service line installations and existing service line upsizing or replacement projects.</u></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 4.3<u>4.2</u> of today's decision for full context.</p>

Reporting Requirements per Section 4.3<u>4.2</u> Ordering Paragraphs 6, 7 and 28 for Common Facility Cost Treatment		
Instructions and Definitions Tab:		
	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.
	Multifamily <u>Multi-family</u>	Any premise with two or more dwelling units shall be considered multifamily for this reporting

Reporting Requirements per Section 4.3<u>4.2</u> Ordering Paragraphs 6, 7 and 28 for Common Facility Cost Treatment		
Instructions and Definitions Tab:		
	Small business <u>Business</u>	Any business with less than 25 employees shall be considered a small business <u>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.</u>
	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/ 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

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

Individual Premise Information <u>Reporting Requirements per Section 4.2</u>	
<u>Common Facility Cost Treatment and Service Upsize Reporting (Project-level)</u>	
Reporting Field	Example Text
USPS-Standardized Service Address	1234 JEFFERSON CT SACRAMENTO CA 95691-4882
Meter ID# (Confidential version only)	123456789 <u>[Meter ID]</u>
Project Identifier # (project ID #) (see instructions)	<u>[Project ID assigned by IOU]</u>
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 <u>or 40-60 amp</u>
Customer existing electrical panel capacity (at the time of initial application) <u>(for Multi-family, specify dwelling units' subpanel capacity, or range, if more than one size)</u>	60
Utility Installed Electrical Service Capacity	200
Customer Installed electrical panel capacity	200
Were full utility costs ratebased? <u>(Y/N)</u>	Y
Is customer a participant of any income-based electrification program? <u>(Y/N)</u>	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? <u>(Y/N)</u>	Y
Premise Type: Small Business, Single Family or	Single

Individual Premise Information <u>Reporting Requirements per Section 4.2</u>	
<u>Common Facility Cost Treatment and Service Upsize Reporting (Project-level)</u>	
Reporting Field	Example Text
Multi family <u>Single-family, or Multi-family</u>	Family <u>Single-family</u>
<u>Number of Interconnecting Service Lines (for Multi-family only)</u>	<u>E.g., 2</u>
<u>Number of dwelling units within property (for Multi-family only)</u>	<u>E.g., 120</u>
Ratebased Utility costs <u>Subsidy received from Common facility cost treatment policy (\$s)</u>	<u>E.g., \$8,343.00</u>
Customer-paid Utility Costs <u>Rule 16 Allowance received (\$s)</u>	<u>E.g., \$0.00</u> <u>2,500</u>
If applicable, was project denied ratebasing of utility costs (i.e. estimated utility costs exceeded Customer-paid Utility Costs (\$10,000s)) Y/N/NA	NA <u>E.g., \$0.00</u>
Reason/s that made the project costs > \$10,000, if applicable	E.g. 1NA , <u>1 NA</u> E.g., <u>2</u> Existing Overground lines were undergrounded E.g., <u>3</u> 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	Electric Cooktop

Individual Premise Information Reporting Requirements per Section 4.2	
Common Facility Cost Treatment and Service Upsize Reporting (Project-level)	
Reporting Field	Example Text
noted in application (e.g., solar, EV charger, HVAC, electric cooktop, water heater). List one measure per column. Add columns if needed.	
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
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

<u>Reporting Requirements per Section 5.3.2, Meter Socket Adapter Installation Timelines</u>	
<u>Instructions and Definitions Tab:</u>	
<u>General Notes</u>	<u>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.</u>

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

(END OF APPENDIX A)

Summary report: Litera Compare for Word 11.6.0.100 Document comparison done on 6/10/2025 8:10:32 AM	
Style name: Default Style	
Intelligent Table Comparison: Active	
Original filename: original - Appendix A to PD.docx	
Modified filename: (Rev. 1) Appendix A to PD R.19-01-011.docx	
Changes:	
<u>Add</u>	63
Delete	43
Move From	0
<u>Move To</u>	0
<u>Table Insert</u>	12
Table Delete	0
<u>Table moves to</u>	0
Table moves from	0
Embedded Graphics (Visio, ChemDraw, Images etc.)	0
Embedded Excel	0
Format changes	0
Total Changes:	118