

Equity Metrics Data Request Template

Purpose

This workbook establishes the required fields, definitions, and structure for the annual submission.

Workbook tabs

Circuit_Data: one row per Circuit_ID and Year. Use this tab for circuit conditions, customer

Project_Data: one row per Project_ID. Use this tab to link projects to circuits and report pr

Data_Dictionary: definitions for each field.

Requested time frame

First submission: forecasted data previously reported in past GNA and DUPR filings for 2019-2025 (to the extent a

General instructions

Use existing utility data where possible. If a field is not available, leave it blank and use

Use consistent units: MW, MWh, dollars, percentages, and customer counts.

For Data_Type, use Actual, Forecast, Planned, or Estimated. Load growth and available headro

For DAC_Pct_of_Total, document the calculation method and source in the DAC_Methodology_Notes

If exact project dates are not available, provide the best available year or approximate timi

If customers are enrolled in more than one equity program, report the overlap counts in the p

Confidential treatment of submitted data

Consistent with Ordering Paragraph [12] of this Resolution, IOUs may designate data submitte

For each annual submission, serve two versions of the completed workbook: (1) a complete, un

Identify confidential fields or values consistently within the workbook (e.g., gray shading c

Accompany each confidential submission with a confidentiality declaration consistent with Ger

Apply the 15/15 Rule adopted in Ordering Paragraph 31 of D.24-10-030 to any data redaction in

Fields derived from publicly available designations, including DAC_Pct_of_Total, are presump

Confidential designations do not limit Commission staff access to the submitted data for purp

mission of equity metrics input data adopted in this Resolution, covering circuit-l

mix, equity program data, and DERs. Submit as the "Equity Metrics Statistics" app
roject status, timing, cost, capacity added, and project drivers. Submit as part of

available), and forecast/planned data through the end of the forecast horizon reflected in the most cur

e Notes to explain the limitation.

om shall reflect forecasted figures; where historical actuals are provided in lieu
s field.
ing and explain in Notes.

program-combination fields (CARE_MED, FERA_MED, CARE_Tribal, FERA_Tribal, MED_Triba

d in this template as confidential to the extent it would reveal customer-specific

redacted confidential version, submitted to Energy Division for purposes of model d

of confidential cells or columns) and apply the "_Confidential" filename suffix con

neral Order 66-D and D.17-09-023, identifying the location of the protected informa
n the public version of the submission.

tively not confidential.

poses of model development, validation, and reporting.

level load growth, available headroom, and distribution project initiation.

endix to the annual GNA filing.

of the annual DUPR filing.

urrent GNA and DUPR filings at the time of submission.**Subsequent submissions:** same years and planni

of unavailable forecasted values, identify them as such in Data_Type.

al, CARE_MED_Tribal, FERA_MED_Tribal) and describe any other overlaps in Notes.

information protected under Public Utilities Code Section 8380, Civil Code Section

development, validation, and reporting; and (2) a public version, with confidential

nsistent with existing GNA and DUPR appendix naming conventions.

ation and the legal basis for each designation.

ing horizon as the annual GNA and DUPR filings.

1798 et seq., or D.14-05-016.

information redacted, submitted with the public GNA and DUPR filings. Redactions i

n the public version shall be limited to data properly designa

Circuit_Data

One row per Circuit_ID and Year.

Utility_or_Service_Territory Planning_Area County City ZIP_Code Circuit_ID Circuit_Name

Substation_ID	Year	Data_Type	Annual_Peak_Load_MW	Forecast_Peak_Load_MW	Load_Growth_MW
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Load_Growth_Pct	Annual_Energy_MWh	Planning_Capacity_MW	Normal_Rating_MW
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Emergency_Rating_MW	Available_Headroom_MW_Y1	Available_Headroom_MW_Y5	Customers_Total
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Residential_CustomersCommercial_Customers Industrial_CustomersAgriculture_Other_Customers

CARE_Customers	CARE_Pct_of_Total	FERA_Customers	FERA_Pct_of_Total
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Medical_Baseline_Customers Medical_Baseline_Pct_of_Tota Tribal_Customers Tribal_Pct_of_Tota

CARE_MED FERA_MED CARE_Tribal FERA_Tribal MED_Tribal CARE_MED_Tribal FERA_MED_Tribal

DAC_Pct_of_Total DAC_Methodology_Notes Notes

Project_Data
One row per Project_ID. Link each project to Circuit_ID where available.

Project_ID	Circuit_to_Project Mapping	Circuit_Name
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Utility_or_Service_Territory\Planning_Area

Year

Project_Type

Project_Status

Proposal_Date

Approval_Date

Initiation_Date

Completion_Date	Estimated_Cost	Actual_Cost	MW_Capacity_Added
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Project_Driver

Constraint_Addressed

Initiated_Project

Initiated_Project_Notes

Deferred_or_Reject Deferral_or_Rejection_Reason

Included_In_Distribution_Pl:Notes

Tab	Field
Circuit_Data	Utility_or_Service_Territory
Circuit_Data	Planning_Area
Circuit_Data	County
Circuit_Data	City
Circuit_Data	ZIP_Code
Circuit_Data	Circuit_ID
Circuit_Data	Circuit_Name
Circuit_Data	Substation_ID
Circuit_Data	Year
Circuit_Data	Data_Type

Circuit_DataAnnual_Peak_Load_MW
Circuit_DataForecast_Peak_Load_MW

Circuit_DataLoad_Growth_MW

Circuit_DataLoad_Growth_Pct
Circuit_DataAnnual_Energy_MWh
Circuit_DataPlanning_Capacity_MW
Circuit_DataNormal_Rating_MW
Circuit_DataEmergency_Rating_MW

Circuit_DataAvailable_Headroom_MW_Y1

Circuit_DataAvailable_Headroom_MW_Y5
Circuit_DataCustomers_Total
Circuit_DataResidential_Customers
Circuit_DataCommercial_Customers
Circuit_DataIndustrial_Customers
Circuit_DataAgriculture_Other_Customers
Circuit_DataCARE_Customers
Circuit_DataCARE_Pct_of_Total
Circuit_DataFERA_Customers
Circuit_DataFERA_Pct_of_Total

Circuit_DataMedical_Baseline_Customers

Circuit_DataMedical_Baseline_Pct_of_Total

Circuit_DataTribal_Customers

Circuit_DataTribal_Pct_of_Total

Circuit_DataCARE_MED

Circuit_DataFERA_MED

Circuit_DataCARE_Tribal

Circuit_DataFERA_Tribal

Circuit_DataMED_Tribal

Circuit_DataCARE_MED_Tribal

Circuit_DataFERA_MED_Tribal

Circuit_DataDAC_Pct_of_Total

Circuit_DataDAC_Methodology_Notes

Circuit_DataNotes

Project_DataProject_ID

Project_DataCircuit_to_Project Mapping

Project_DataCircuit_Name

Project_DataUtility_or_Service_Territory

Project_DataPlanning_Area

Project_DataYear

Project_DataProject_Type

Project_DataProject_Status

Project_DataProposal_Date

Project_DataApproval_Date

Project_DataInitiation_Date

Project_DataCompletion_Date

Project_DataEstimated_Cost

Project_DataActual_Cost

Project_DataMW_Capacity_Added

Project_DataProject_Driver

Project_DataConstraint_Addressed

Project_DataInitiated_Project

Project_DataInitiated_Project_Notes

Project_DataDeferred_or_Rejected_Flag

Project_DataDeferral_or_Rejection_Reason

Project_DataIncluded_In_Distribution_Plan

Project_DataNotes

Description

Utility name or service territory label.

Planning area or region, if available.

County associated with the circuit.

City associated with the circuit.

ZIP code associated with the circuit.

Unique circuit identifier.

Circuit name, if available.

Substation serving the circuit.

Reporting year.

Actual, Forecast, Planned, or Estimated.

Historical peak load recorded during the reporting year, provided as a reference baseline. The
Forecasted annual peak load for the circuit.

Forecasted increase in peak load from the prior year to the reporting year, in MW, based on p

Forecasted percent change in peak load from the prior year to the reporting year, based on pl
Total annual energy served on the circuit.

Capacity used for planning decisions.

Circuit rating.

Short-term emergency rating, if used.

Available headroom at Year 1 of the planning horizon, calculated as the difference between th

Available headroom at Year 5 (forecast conditions), calculated as the difference between the
Total customers served by the circuit.

Residential customer count.

Commercial customer count.

Industrial customer count.

Agricultural or other customer count.

Customers enrolled in CARE.

CARE customers as a share of total circuit customers.

Customers enrolled in FERA.

FERA customers as a share of total circuit customers.

Customers enrolled in the Medical Baseline Program, including customers receiving an equivalence

Medical Baseline customers, as defined above, as a share of total circuit customers.

Tribal population customers: Customers that are members of a Tribal community, identified the Tribal community customers as a share of total circuit customers.

Customers enrolled in CARE and Medical Baseline

Customers enrolled in FERA and Medical Baseline

Customers enrolled in CARE and that belong to a Tribal community

Customers enrolled in FERA and that belong to a Tribal community

Customers enrolled in Medical Baseline and that belong to a Tribal community

Customers enrolled in CARE and Medical Baseline and that belong to a Tribal community

Customers enrolled in FERA and Medical Baseline and that belong to a Tribal community

Share of circuit customers located within a census tract designated as a Priority Population

Method/source used to calculate DAC percentage.

Definitions, limitations, approximations, or other comments.

Unique project identifier.

List of the circuits affected separated by ";"

Circuit name, if available.

Utility name or service territory label.

Planning area or region, if available.

Reporting year.

Project category/type.

Proposed, Approved, Initiated, Completed, Deferred, or Rejected.

Date project was proposed, if available.

Date project was approved, if available.

Date project began or was initiated.

Date project completed, if available.

Estimated project cost.

Actual project cost, if available.

Incremental capacity added by the project.

Main driver: load growth, reliability, safety, electrification, asset replacement, or other.

Constraint or issue the project addresses.

Yes/No flag indicating whether project has been initiated or not according to the IOUs definition

Definition of the IOU's "initiated project" status, including the specific milestone or criteria

Yes/No flag indicating whether project was deferred or rejected.

Reason for deferral or rejection, if applicable.

Yes/No field for whether project is included in distribution planning documents.

Definitions, limitations, approximations, or other comments.

his field is not used as a primary input in the equity metrics models; forecasted f

planning inputs such as IEPR forecasts and used to anticipate future infrastructure

lanning inputs such as IEPR forecasts. Historical actuals may be provided where for

he circuit's capacity rating and its forecasted near-term peak load. This represent

circuit's capacity rating and its forecasted peak load five years into the plannin,

ent medical discount if enrolled in an opt-in rate that does not include tiers, con

rough CalEPA's DAC designations or equivalent Tribal land mapping.

under SB 535, based on CalEnviroScreen 4.0 or the most recent version at the time

ition.

eria used to determine whether a project has been initiated, for purposes of cross-

Figures shall be used for modeling purposes consistent with this Resolution.

Needs for the next planning cycle. Historical actuals may be provided where forecasts are unavailable, and shall be clearly identified as such in the Data

is the amount of additional load that can be accommodated without system upgrades at

g horizon, reflecting expected changes due to load growth and planned system condit

sistent with Ordering Paragraph 25 of Decision 24-10-030 and Ordering Paragraph 4 c

of filing. Calculated by mapping each customer's service address to its associated

-utility comparability.

asted values are unavailable, and shall be clearly identified as such in the Data_T
a_Type field.

t the start of the planning cycle, based on forecasted conditions.

tions inclusive of planned investments already incorporated into the planning cycle

of this Resolution.

census tract. Program-enrolled customers (CARE, FERA, Medical Baseline) or custome

type field.

Δ. This represents the amount of additional load that can be accommodated without sy

ers already counted under the "Tribal" population that are located outside a DAC-de

system upgrades at that future point in time. Note: Any methodology in headroom calc

signated census tract **shall not be added to this count.** Methodology shall be documented in the

ulation different from the established, s

DAC_Methodology_Notes field.