

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA
I.D. # 7989
ENERGY DIVISION RESOLUTION E-4205
November 6, 2008

R E S O L U T I O N

Resolution E-4205. Southern California Edison (SCE), on behalf of all California Solar Initiative (CSI) Program Administrators, including the California Center for Sustainable Energy (CCSE), propose a set of revisions to the CSI Program Handbook conforming to the Final Performance Data Provider (PDP) Protocol.

SCE Advice Letter 2258-E and 2265-E (filed on July 30, 2008 and August 14, 2008) and Protest to Advice Letter 2258-E (filed August 18, 2008), and SCE Response to Protest (filed August 26, 2008).

This resolution approves, with modifications, the final performance data provider protocols proposed by Southern California Edison, on behalf of the California Solar Initiative Program Administrators, in Advice Letter 2258-E and 2265-E.

SUMMARY

AL 2258-E: CSI Program Handbook Revisions Introducing a Final Performance Data Provider (PDP) Protocol.

The purpose of these proposed California Solar Initiative (CSI) Program Handbook modifications is to outline the required process and qualifications to be approved as a Performance Data Provider (PDP) for the CSI incentive program. Under the program, a PDP reports energy production from an installed solar system in order for the solar customer to receive a stream of incentive payments under the Performance Based Incentive (PBI) portion of the CSI program. The proposed changes also detail the data reporting requirements (format, delivery method) and schedule for Performance Based Incentive data reports. The PDP requirement is mutually exclusive of the requirements identified in the CSI Handbook for the Performance Monitoring and Reporting Services (PMRS). However, the PMRS provider may provide both PMRS and PDP services. All PDPs must meet the requirements established herein in addition to the requirements set forth in the CSI Program Handbook.

On July 30, 2008, SCE, on behalf of the CSI Program Administrators (PAs), filed AL 2258-E, which proposed a final PDP protocol to govern monitoring and reporting of solar system performance data that serves as the basis for performance based incentive

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(PBI) payments. The PDP protocols proposed in AS 2258-E would replace the interim PDP protocols currently in Appendix H of the CSI Program Handbook.

AL 2265-E: Modification of proposed CSI Program Handbook Revisions Introducing a Final Performance Data Provider (PDP) Protocol to add a bond requirement

On August 14, 2008, SCE, on behalf of the CSI PAs, submitted AL 2265-E. The purpose of this AL was to modify the previously submitted final PDP Protocols in order to add a bond requirement for PDP providers.

- SCE's proposed revisions conform with CPUC decisions and Sections 25405.5 and 25405.6, and Chapter 8.8 to Division 15 of the Public Resources Code, and Sections 387.5 and 2851 of the Public Utilities Code.
- SCE's proposed changes, while not directly related to either CPUC decisions or California State Law, are in the spirit of the goals of the CSI Program and further the goal of achieving 3,000 MW of installed distributed generation solar by 2016.
- Comments to this Resolution shall be returned to the CPUC no later than 5 p.m. Pacific Standard Time on October 26th, 2008, with Reply Comments being submitted no later than October 31st, 2008, by 5 p.m. Pacific Standard Time. This Resolution will be on the next regularly scheduled meeting date after comments, likely to be November 6, 2008.

BACKGROUND

On September 4, 2007, Administrative Law Judge (ALJ) Duda issued an ALJ Ruling Requesting Comments On Petition For Modification Of Metering Independence Requirements (2007 Ruling). The 2007 Ruling requested comments on a Joint Petition for Modification of D.06-08-028 Regarding California Solar Initiative Metering Requirements (PFM), which sought elimination of the metering independence requirements. Specifically, the Ruling solicited comments from interested parties on removal of the requirements for independent metering and performance monitoring adopted in D.06-08-028 in favor of explicit instructions for qualifying as a performance data provider of CSI meter information to CSI PAs. The concept of introducing performance data providers into the CSI came out of the metering, reporting and monitoring requirements of the Direct Access Program. The goal of introducing performance data providers into the CSI Program, and creating specific requirements to qualify as a provider of these services, was to help safeguard ratepayer funded incentive payments.

On January 31, 2008, the Commission issued D.08-01-030 modifying the CSI performance monitoring and reporting rules to remove the independence requirement

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and mandate that all performance monitoring services be unaffiliated with all CSI incentive recipients, solar installers, or solar manufacturers. This decision replaced the independence requirement with the PDP protocol for data validation. In addition, the Commission ordered the Energy Division (ED) to convene public workshops to discuss possible improvements and refinements to the requirements in the PDP protocol proposal that was attached to the 2007 Ruling. This decision also ordered the CSI PAs to file an Advice Letter with a PDP protocol within 30 of the filing of a workshop report by ED staff. In February and May 2008, the ED facilitated a total of three workshops, which were well attended by the CSI PAs and interested parties. The focus of the workshops was to address and reach consensus on the seven PDP issue areas listed in D.08-01-030. The seven specific issue areas addressed at the workshops included:

1. Data format, reporting and retention.
2. Data security and confidentiality.
3. Data and payment validation.
4. Measurement and evaluation.
5. Technical and customer support.
6. PDP performance exemptions.
7. PDP non-performance and appeal process.

On July 1, 2008, ED filed a workshop report that contained a PDP protocol proposal that reflected a consensus position on each of the PDP protocol issue areas. The ED workshop report noted that for the issue of data and payment validation the PAs should address data validation requirements and take into consideration concerns raised by PMRS providers when making any associated advice letter filing. In response, the PAs and interested parties continued to discuss the data validation and transfer requirements and reached agreement on improvements relating to this PDP issue. Consistent with the 2008 Ruling and the ED workshop report, the CSI PAs submitted AL 2258-E on July 30, 2008, and subsequently filed 2265-E on August 14, 2008.

On August 18, 2008, the PMRS Providers filed a protest of AL 2258-E. In their protest, the PMRS Providers requested that the CSI PAs consider modifying the following elements of the PDP Protocols:

- The date requirement for EDI 867 compliance
- Penalties for failing data transfer test
- PDP reimbursement of PA or Customer
- Proof of sufficient bond or insurance coverage
- Recognition of proposed PDP Protocols modifications made as part of March 17, 2008 post-workshop comments

On August 26, 2008, SCE filed a response to the protest of the PMRS Providers. In this response, SCE proposed modifications to AL 2258-E and AL2265-E that directly addressed the concerns raised by the PMRS Providers in their protest.

SUMMARY OF ADVICE LETTER FILINGS

Summary of AL 2258 – E

Utility customers participating in the CSI program are required to install performance meters to determine the actual output of their generation equipment. For customers enrolled under the CSI PBI program, data from these meters will be used to calculate their monthly incentive payment. This data may be read and communicated to the PA by a PDP. Customers may also elect to contract this service through their local utility company. This document provides information and instructions for non-utility providers wishing to qualify to provide PDP services.

The following are the PDP's primary responsibilities:

- Manage meter reading/ data retrieval schedule
- Read and retrieve performance meter data
- Post data on appropriate Program Administrator server on a consistent and reliable schedule, per individual Program Administrator requirements.
- Validate performance data prior to providing to the PA using the approved validation rules outlined in this document
- Calculate monthly production of solar generating system for incentive payment
- Format data using EDI 867 or other approved protocol
- Troubleshoot and resolve communications issues
- Store data in accordance with program requirements
- Make historical performance data available to Program Administrators as requested
- Provide technical support to Program Administrators as well as customer support
- Communicate meter/device changes to the Program Administrator
- Provide disaster recovery and data backup services as requested by respective Program Administrator
- Manage data on PDP server
- Ensure confidentiality of customer information and performance data
- Possess technical expertise and capability
- Comply with all State and Federal laws

Summary of AL 2265-E

After the conclusion of the ED-facilitated workshops, the PAs continued to discuss additional ways to refine and improve the PDP Protocols. As a result of these additional discussions, the PAs recommended an addition to the PDP Protocols to add a bond requirement that reflects the current market practices of participants in the CSI program. A bond requirement is a common practice that allows PDPs to remain in

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compliance with all applicable provisions governing the CSI Program and PDP Protocols.

The bond requirement is necessary in the event that an end-use customer suffers damages as a result of the PDP's actions. A bond will provide a source of compensation for those damages. The PAs recommended that the Commission add a bond requirement to the final PDP Protocols submitted in Advice 2258-E, as shown in Attachment A, and conform the CSI Handbook as necessary.

PROTESTS

Advice Letter 2058-E was protested by CSS-Technologies, Draker Laboratories (fka Draker Solar Design, LLC), Energy Recommerce, Inc., Fat Spaniel Technologies, Inc., Glu Networks, natcon7, PowerNab, and Pyramid Solar (jointly, hereafter, the PMRS Providers) on August 18, 2008.

In their protest, they outlined five issues and questions for the CSI PAs to answer relating to the PDP Protocols.

1. The date requirement for EDI 867 compliance

In the PDP Protocols filed as part of AL 2258-E and AL 2265-E, no specific date was given for when PDP providers would have to begin compliance with EDI 876 data transfers regulations. In their protest, the PMRS Providers requested that the CSI PAs amend the PDP Protocols to include a 6 month implementation period for the PDP Protocols, at the end of which all PDPs must be in the process of "active EDI 867 implementation testing".

2. Penalties for failing data transfer test.

In the PDP Protocols filed as part of AL 2258-E and AL 2265-E, there is a regulation that any PDP provider that fails their data transfer test three times will have their PDP eligibility revoked for 6 months. In their protest, the PDP Providers argue that there may be valid reasons why a given provider may fail their transfer test three times. So, instead of revoking their eligibility, the penalty should be that the PDP provider is forced to pay the CSI PA for any additional transfer tests.

3. PDP reimbursement of PA or Customer

In the PDP Protocols filed as part of AL 2258-E and AL 2265-E, it states if an audit shows a discrepancy between the PDP reported data and data obtained by the Program Administrator for a specific customer that is greater than 5%, the PDP will be responsible for reimbursing the customer or Program Administrator for any such difference if it is determined that the difference is due to PDP error. In their protest, the PDP Providers request that any financial penalties be removed, and in their place the addition of mandatory audits for PDPs who mis-report data and a revocation of eligibility for a PDP provider who has mis-reported more than three times.

4. Proof of sufficient bond or insurance coverage

In the PDP Protocols filed as part of AL 2258-E, it states that PDP providers must provide a proof of sufficient bond or insurance coverage. The PDP Providers protest requests that the CSI PAs include a specific amount of insurance coverage or bond amount. In AL 2265-E, which modifies the PDP Protocols, the CSI PAs clarify that the bond requirement should be set at twenty thousand dollars.

5. Recognition of proposed PDP Protocols modifications made as part of March 17, 2008 post-workshop comments

On March 17, 2008, a group of PMRS providers filed joint post-workshop comments. In their comments, they requested minor changes to the then draft PDP Protocols to reflect modifications that had been discussed at the workshop. The issues covered were deadlines for resolving data transfer testing problems, PDP non-performance, and criteria for PDP appeals.

PROTEST RESPONSE

Summary of SCE's August 26, 2008 Response to Protest

On August 26, 2008, the CSI PAs submitted a response to the protest of the PMRS Providers. In this response, the CSI PAs directly addressed each of the concerns raised by the PMRS Providers. This response also included specific proposals to modify the PDP Protocols that were submitted as part of AL 2258-E and AL 2265-E. An outline of each of these proposals is below.

1. Advice 2258-E Should be Modified to Specify that the EDI 867 Requirement be Effective 6 Months from the AL Effective Date

In its Protest, the PMRS Providers noted that a date certain is necessary to implement the EDI 867 requirement, in order to enable proper business planning for prospective PDPs, as well as to minimize confusion, increased costs, and bottlenecks during the EDI 867 testing phase.

The PAs acknowledge the PMRS Providers' concerns and agree that a date certain is appropriate. As such, the PAs suggested that they will file a supplemental advice letter to modify the CSI Program Handbook to specify that (i) the EDI 867 Requirement will not become effective until six (6) months from the effective date of that supplemental advice letter filing; and (ii) testing requirements will commence after that effective date. Additionally, as the program develops and more information becomes available, the PAs reserve the right to revisit this issue, as necessary.

2. Advice 2258-E Should be Modified to Delete the Requirement that PDP Applicants Cease Business Activities Following an Unsuccessful Third Integration Test

In its Protest, the PMRS Providers assert that, with regard to penalties for failing

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Data Transfer Testing, parties agreed to a replacement mechanism in the form of a cash payment/penalty due to the PAs for each test conducted subsequent to the third test. However, while the parties agreed to the concept of such a replacement mechanism, no agreement was ever reached on the appropriate cost of the payment/penalty structure, as the PMRS Providers point out in their petition. Additionally, the PAs overlooked the comments of the PMRS Providers provided in Attachment B of the June 25, 2008, Energy Division (ED) workshop report and included the penalty provision for PDP failure of Data Transfer Testing in Advice 2258-E.

While the PAs are willing to continue negotiating with the PMRS Providers on the specifics of a replacement penalty mechanism, the PAs will propose, in the supplemental advice letter filing to Advice 2258-E, a mechanism that simply prohibits a PDP applicant from adding any additional customers until such PDP applicant passes Data Transfer Testing. Such a mechanism would obviate any problem of stranded PBI customers. Additionally, as the program develops and more information becomes available, the PAs reserve the right to revisit this issue, as necessary.

3. Advice 2258-E Should be Amended to Delete the Financial Penalties Associated with Audit/Investigation Discrepancies Between the PDP Reported Data and Data Obtained by the PA

In its protest, the PMRS Providers claim that financial penalties associated with audit or investigation discrepancies between the PDP reported data and data obtained by the PA for a specific customer, which are greater than +/-5%, essentially are unnecessary. They suggest that the over/underpayments can be adjusted in successive payment periods over the life of the program.

The PAs agree with the PMRS Providers that payment adjustments in successive payment periods would be a sufficient and reasonable business practice for mitigating any over/underpayments. The PAs therefore will delete, in the supplemental advice letter filing to Advice 2258-E, the financial penalties associated with audit or investigation discrepancies between the PDP reported data and data obtained by the PA. Additionally, as the program develops and more information becomes available, the PAs reserve the right to revisit this issue, as necessary.

4. Advice 2258-E Should be Amended to Delete the "Proof of Sufficient Bond or Insurance Coverage" from Page 8 of Attachment A

In its protest, the PMRS Providers noted the inclusion of a new bond or insurance requirement that appears in Attachment A to AL 2258-E. PMRS Providers are not necessarily against this bond or insurance requirement, but express concerns about what "sufficient" levels of coverage might be and question why this requirement would be added now since it was removed from the CSI program in September of 2007.

Subsequent to filing Advice 2258-E, SCE submitted Advice 2265-E on behalf of the PAs. Advice 2265-E seeks Commission approval of a modification to the final PDP Protocols currently under consideration by the Commission in order to add a bond

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requirement to the final PDP Protocols. The language cited by the PMRS Providers was inadvertently included in Attachment A of Advice 2258-E and should be deleted. The PAs will delete the "Proof of sufficient bond or insurance coverage" language from Page 8 of Attachment A in the supplemental advice letter filing to Advice 2258-E. Additionally, as the program develops and more information becomes available, the PAs reserve the right to revisit this issue, as necessary.

5. The Commission Should Allow the PAs Sufficient Process Flexibility to Clarify the Issues Referenced In Item # 5 of the Protest

The PMRS Providers acknowledge that the PDP requirements attached to Advice 2258-E reflect the discussion on the larger specific issues targeted at the three workshops attended by parties in 2008. However, the PMRS Providers noted that, "the draft still fails to adequately address the questions, concerns and comments submitted by the majority of the PMRS Providers as part of their collective filing with the Commission on September 18, 2007."

Although the PAs acknowledge receipt of the PMRS Providers' issues identified in the attachment to the Protest, the PAs require time to adequately address these additional issues. The PAs are willing to continue negotiations towards attempting to resolve these issues and any other questions, concerns, and comments that arise during such negotiations. If the parties can agree on further modifications to the PDP requirements, the PAs will submit an advice letter to incorporate such modifications into the CSI Program Handbook. The PAs should retain sufficient flexibility to modify PDP requirements in the future as the CSI program evolves. The PAs recognize that three mechanisms exist for parties to resolve ongoing issues. The primary mechanism is the Sub-metering Work Group. If, for any reason the Sub-metering Work Group is dissolved, alternate mechanisms include the CSI Forum, which meets quarterly, and/or further workshops as necessary.

Nevertheless, the Commission should not delay approval of a supplemental advice letter filing to Advice 2258-E based on any perceived need for clarification of issues that are outside the scope of Advice 2258-E as they are ample forums to continue considering these issues.

NOTICE

Notice of AL 2258-E and 2265-E was made by publication in the Commission's Daily Calendar on July 30, 2008 and August 16, 2008. SCE states that a copy of the Advice Letter was mailed and distributed in accordance with Section III-G of General Order 96-B.

COMMENTS

Comments to this Resolution shall be returned to the CPUC no later than 5 p.m. Pacific Standard Time on October 26th, 2008, with Reply Comments being submitted no later than October 31st, 2008, by 5 p.m. Pacific Standard Time. This Resolution will be on the next regularly scheduled meeting date after comments, likely to be November 6, 2008.

DISCUSSION

The Commission adopts revised the PDP Protocols filed as part of AL 2258-E and AL 2265-E to reflect the proposed modifications set forth in SCE's reply to the protests. In Attachment 1 of this Resolution are the PDP Protocols filed as part of AL 2258-E and AL 2265-E, and including four modifications of the PDP Protocols based upon the protest of the PMRS providers and the reply comments of SCE. Throughout the development of the PDP Protocols, representatives from the CSI Program Administrators, PMRS providers and other stakeholders worked closely to make sure the concerns and needs of all parties were addressed. These PDP Protocols are the culmination of this collaboration, and the Commission is therefore adopting these PDP Protocols because they represent a consensus agreement on the substantive issues of the PDP Protocols.

PDP Protocol modification 1:

PMRS Providers requested a firm date for EDI-867 implementation, and suggested a minimum of 6 months. In response, SCE proposed a modification to the PDP Protocols that clearly states that the EDI 867 requirement be effective 6 months from the date the PDP protocols become effective. The Commission therefore adopts the following modification to the PDP Protocols:

"Data Reports must be formatted using the ANSI X.12 Electronic Data Interchange 867 protocol (EDI 867) unless otherwise specified. Sample EDI 867 Implementation Guides and Tutorials are available from each of the Program Administrators. The EDI 867 requirement will go into effect 6 months from the day the PDP Protocols are ratified. After this effective date, all PDP Providers must, at minimum, be in the process of EDI 867 data transfer tests with one or more Program Administrators."
(Instructions for Qualifying as a performance data provider for the California Solar Initiative, p.3)

PDP Protocol modification 2:

The PMRS Providers requested that a "three strikes and your out" penalty for failing data transfer testing be removed. In response, SCE proposed removing the requirement that PDP applicants cease business activities following an unsuccessful

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third test, and instead be banned from adding new customers until such time as they complete and pass their testing. The Commission therefore adopts the following modification to the PDP Protocols:

“The Program Administrator will check the test file to ensure it complies with the guidelines and notify the PDP applicant within 5 business days. Once the PDP is notified it has passed the test, the PDP is considered qualified. If the PDP applicant fails the test, they will be given 2 weeks to resolve any technical or data format issues. *If a PDP applicant fails their Data Transfer Test with any individual CSI PA more than 3 times, they will not be eligible to add any additional customers in that PAs service territory until such PDP applicant passes the Data Transfer Test.*” (Instructions for Qualifying as a performance data provider for the California Solar Initiative, p.9)

PDP Protocol modification 3:

The PMRS Providers requested the removal of the requirement that PDPs reimburse either the CSI Program Administrator or their customer when there is a discrepancy between reported data and data obtained by the CSI PA for a specific customer that is greater than +/-5%. In response, SCE proposed removing the financial penalties in favor of a process whereby discrepancies can be adjusted in subsequent payment periods, with the exception that if a discrepancy is found during the last 3 months of the PBI payment, then the PDP may be held financially responsible. The Commission therefore proposes the following modification to the PDP Protocols:

“If an audit or investigation shows a discrepancy between the PDP reported data and data obtained by the Program Administrator for a specific customer that is greater than +/-5% *and within the last three months of the PBI payment cycle*, the PDP will be responsible for reimbursing the customer or Program Administrator for any such difference if it is determined that the difference is due to PDP error. The PDP will also be put on an audit schedule by the Program Administrator. If a third audit uncovers any discrepancy due to PDP error, the PDP’s approval will be revoked and the customer given an opportunity to select another PDP as described above. Audits may be conducted as stated in the CSI Handbook Section 3.4.3.” (Instructions for Qualifying as a performance data provider for the California Solar Initiative, p.6-7)

PDP Protocol modification 4:

The PMRS Providers requested clarification regarding the requirement to show proof of bond or insurance coverage. In response, SCE cited AL 2265-E, which clearly stated that PDP providers maintain a bond of \$25,000. The Commission therefore proposes the following modification to the PDP Protocols:

***“Bond Requirement:** Consistent with the general market practices and requirements for installers participating in the CSI Program¹, the PAs are establishing a bond requirement for PDPs. The bond requirement will help to ensure that the PDPs adhere to all applicable provisions governing the CSI Program and the PDP Protocols. Should an end-use customer suffer damages as a result of the PDP’s actions, the bond will provide a source of compensation.*

As such, in addition to the written application to the PA seeking PDP status, the PDP must arrange for and maintain a bond in favor of the State of California in the amount of \$25,000. Any claim by a customer against a PDP should follow the requirements of the specific bonding agency. If a successful claim is made against the bond and reduces the bond, then the PDP must submit a copy of the hearing decision within thirty (30) days of the decision and must also replenish the bond within sixty (60) days.

If the PDP secures a bond, a copy of the bond must be submitted with the written application. The bond must insure to the benefit of anyone who may be damaged as a result of the PDP’s actions or inactions related to its services. If a customer files a complaint for damages against the PDP in civil court and makes a claim against the bond, the PDP must provide a copy of the complaint to the PA within thirty (30) calendar days of being served by registered or certified mail.” (Instructions for Qualifying as a performance data provider for the California Solar Initiative, p.2)

PDP Protocol modification 5:

The PMRS Providers requested that the CSI PAs be considerate of the need to modify the PDP regulations in the future. In response, SCE stated that there are multiple venues to address on-going implementation of the PDP Protocols. The Commission does not propose any modifications.

FINDINGS

1. By SCE Advice Letter 2258-E and 2265-E filed on July 30, 2008 and August 14, 2008 SCE proposes revisions to the CSI Program Handbook.
2. CSS-Technologies, Draker Laboratories (fka Draker Solar Design, LLC), Energy Recommerce, Inc., Fat Spaniel Technologies, Inc., Glu Networks, natcon7, PowerNab, and Pyramid Solar (jointly, hereafter, the PMRS Providers) submitted a protest dated August 16, 2008, on SCE AL 2258-E. The PMRS Providers request clarification relating to:

¹The CSI Program insurance requirement is twofold. All participating CSI Program contractors must be licensed by the Contractors State License Board, and one of the requirements to be licensed includes bonding. Installers are also required to have insurance/ bonding by utility interconnection departments.

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- the date requirement for EDI 867 compliance
 - penalties for failing data transfer test
 - PDP reimbursement of PA or Customer
 - proof of sufficient bond or insurance coverage
 - recognition of proposed PDP Protocols modifications made as part of March 17, 2008 post-workshop comments
3. SCE submitted a response to the protest on August 26, 2008, which proposed specific modifications to the PDP Protocols to address the concerns of the PMRS Providers. All elements of the protest of the PMRS Providers have been addressed in SCE's proposed modifications to the PDP Protocols included in their reply comments.

THEREFORE IT IS ORDERED THAT:

1. The CSI Program Handbook be modified pursuant to Attachment 1 of SCE AL 2058-E and AL 2065-E is approved, except for changes to the **Data Format Requirements, PDP Non-Performance, Data Transfer Test** sections of Attachment 1, as discussed above.
2. The effective date of these changes is the effective date of this resolution, and the CSI Program Handbook should be reissued by the Energy Division as soon as practical in accordance with the details within this resolution.
3. Energy Division will conform the most current edition of the CSI Program Handbook to the revisions adopted in this Resolution.

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 November 6, 2008; the following Commissioners voting favorably thereon:

Paul Clanon
Executive Director

**California Public Utilities Commission
Energy Division Resolution E-4205
Attachment 1**

INSTRUCTIONS FOR QUALIFYING AS A PERFORMANCE DATA PROVIDER FOR THE CALIFORNIA SOLAR INITIATIVE PROGRAM

REVISED OCTOBER 1, 2008

The purpose of this document is to outline the required process and qualifications to be approved as a Performance Data Provider (PDP) for the California Solar Initiative incentive program. This document also details the data reporting requirements (format, delivery method) and schedule for Performance Based Incentive data reports. The PDP requirement is mutually exclusive of the requirements identified in the CSI Handbook for the Performance Monitoring and Reporting Services. However, the PMRS provider may provide both PMRS and PDP services. All PDPs must meet the requirements established herein in addition to the requirements set forth in the CSI Program Handbook.

BACKGROUND AND REQUIREMENTS

Utility customers participating in the California Solar Initiative (CSI) program are required to install performance meters to determine the actual output of their generation equipment. For customers enrolled under the CSI Performance Based Incentive (PBI) program, data from these meters will be used to calculate their monthly incentive payment. This data may be read and communicated to the Program Administrator (PA)² by a third-party Performance Data Provider (PDP). Customers may also elect to contract this service through their local utility company. This document provides information and instructions for non-utility providers wishing to qualify to provide PDP services.

The following are the PDP's primary responsibilities:

- Manage meter reading/data retrieval schedule
- Read and retrieve performance meter data
- Post data on appropriate Program Administrator server on a consistent and reliable schedule, per individual Program Administrator requirements.
- Validate performance data prior to providing to the PA using the approved validation rules outlined in this document

² PG&E and SCE are the Program Administrators for the California Solar Initiative program for customers in their respective service territories. The California Center for Sustainable Energy is the Program Administrator for the SDG&E service territory.

1.

- Calculate monthly production of solar generating system for incentive payment
- Format data using EDI 867 or other approved protocol
- Troubleshoot and resolve communications issues
- Store data in accordance with program requirements
- Make historical performance data available to Program Administrators as requested Provide technical support to Program Administrators as well as customer support Communicate meter/device changes to the Program Administrator
- Provide disaster recovery and data backup services as requested by respective Program Administrator
- Manage data on PDP server
- Ensure confidentiality of customer information and performance data
- Possess technical expertise and capability
- Comply with all State and Federal laws

Bond Requirement

Consistent with the general market practices and requirements for installers participating in the CSI Program³, the PAs are establishing a bond requirement for PDPs. The bond requirement will help to ensure that the PDPs adhere to all applicable provisions governing the CSI Program and the PDP Protocols. Should an end-use customer suffer damages as a result of the PDP's actions, the bond will provide a source of compensation.

As such, in addition to the written application to the PA seeking PDP status, the PDP must arrange for and maintain a bond in favor of the State of California in the amount of \$25,000. Any claim by a customer against a PDP should follow the requirements of the specific bonding agency. If a successful claim is made against the bond and reduces the bond, then the PDP must submit a copy of the hearing decision within thirty (30) days of the decision and must also replenish the bond within sixty (60) days.

If the PDP secures a bond, a copy of the bond must be submitted with the written application. The bond must insure to the benefit of anyone who may be damaged as a result of the PDP's actions or inactions related to its services. If a customer files a complaint for damages against the PDP in civil court and makes a claim

³The CSI Program insurance requirement is twofold. All participating CSI Program contractors must be licensed by the Contractors State License Board, and one of the requirements to be licensed includes bonding. Installers are also required to have insurance/ bonding by utility interconnection departments.

against the bond, the PDP must provide a copy of the complaint to the PA within thirty (30) calendar days of being served by registered or certified mail.

PDP TASK REQUIREMENTS

Data Format

Data must conform to the specific program requirements (for CSI requirements, see Section 12 of the CSI Handbook). The PBI Data Report must include 15-minute (as defined in Section 12.3.3 *Time Granularity of Acquired Data*, CSI Program Handbook) and the monthly cumulative production meter read. All PBI Data Reports must be formatted using the ANSI X.12 Electronic Data Interchange 867 protocol (EDI 867) unless otherwise specified. Sample EDI 867 Implementation Guides and Tutorials are available from each of the Program Administrators. The EDI 867 requirement will go into effect 6 months from the day the PDP Protocols are ratified. After this effective date, all PDP Providers must, at minimum, be in the process of EDI 867 data transfer tests with one or more Program Administrators.

Data Reporting, Security and Confidentiality

The PDP is responsible to ensure timely, consistent and accurate reporting of performance data. Data must be located in a secure facility, on a secure server and have firewall and equivalent protection. The PDP must protect the confidentiality of the customer information and performance data in accordance with all program guidelines (for CSI requirements, see Section 12 of the CSI Handbook). The data must be transferred to each PA using a secure FTP server and each PDP must contact the appropriate PA to obtain the secure FTP address. The PDP must follow all applicable state and federal privacy and data security laws. **The Program Administrator is not responsible for, and will not pay any customer incentives based on missing, estimated or invalid performance data.**

Data Validation

The PDP must validate all data prior to posting it to the PAs secure FTP server. The following data validation rules shall apply:

- Time Check of Meter Reading Device/System (all)
- Meter Identification Check (all)
- Time Check of Meter (all)
- Pulse Overflow Check (if applicable to metering system)
- Test Mode Check (if applicable to metering system)
- Sum Check

Descriptions of these validation rules are included in Attachment A.

Payment Validation, Data Audits, and Measurement and Evaluation Program

The Program Administrator may, at their discretion, perform validations on incentive payments prior to issuing payments to customers participating in this program. The validations will compare actual monthly incentive payments with expected payments based on design specifications and expected performance data submitted with the customers' approved incentive reservation documentation. If payments fall outside expected ranges for the month, the incentive payment will be withheld until the Program Administrator determines to its satisfaction the reason for the discrepancy.

The PDP will work with the customer to resolve any discrepancies identified by the Program Administrator, which may include testing and/or recalibrating the meter/devices if deemed necessary. The Program Administrators are not responsible for the costs associated with investigating and resolving any such discrepancies (i.e. testing, meter replacement hardware, installation labor). However, if the Program Administrator requests an investigation which finds that the metering system is accurate, the Program Administrator will pay all reasonable and necessary costs for the investigation.

The Program Administrator will also perform random audits of PDP data to ensure accuracy and compliance with the requirements outlined in this document, or as part of the CSI Measurement and Evaluation Program in accordance with Section 7 of the CSI handbook. Any PDP found to be in violation of any of these requirements will be subject to the penalties outlined later in this document. The Program Administrator, via the servicing local utility or its designated contractor may, at its discretion, inspect and test the performance meter or install separate metering in order to check meter accuracy, verify system performance, or confirm the veracity of monitoring and reporting services.

Any additional metering installed by or at the request of the Program Administrator will be paid for by the Program Administrator. However, in the event metering is installed during the course of an audit or investigation initiated by the Program Administrator where cheating or tampering is suspected and confirmed, the System Owner will be charged for these costs.

Data Retention

Raw and PDP validated interval and cumulative monthly data must be retained in accordance with appropriate program requirements (see Section 12. of the CSI Handbook for CSI program requirements). The PDP must be prepared to post historical interval data at the Program Administrator's request. The Program Administrator audit will include raw interval data which is to be maintained by the PDP for comparison with validated interval data transmitted to the Program

Administrator. The PDP is also responsible for providing backup and disaster recovery services for 100% of the data (in accordance with the CSI data retention policy outlined in Section 12 of the CSI Program Handbook)

Technical and Customer Support

The PDP must provide a technical support number to the Program Administrator for use during normal business hours (8am to 5pm Pacific time, Monday through Friday, except holidays) to help resolve any data availability, format or corruption issues, communication problems, server access problems, or other technical issues. Within those normal business hours, the PDP must respond to Program Administrator requests within two business days with a status report and plan for correcting the issues. The PDP must also provide a customer support number to respond to customer inquiries within two business days from the initial customer contact. Program Administrators will have the discretion to set deadlines for the resolution of data transfer problems/issues.

PDP Performance Exemptions

The PDP is responsible for meeting the above noted program requirements and for consistently posting performance data in accordance with the Program Administrator's scheduling and data posting requirements. At its discretion, the Program Administrator may grant reasonable allowances for occasional issues or technical problems, as well as for large catastrophic events such as earthquakes.

In the event of such catastrophic event resulting in an energy production interruption; OR in the event of metering or communications equipment failure where the production data is irretrievable by the PDP at no fault of the customer AND it can be determined that the customer's generating equipment was still operating and interconnected with the utility grid, the Program Administrator may extend the PBI incentive payment period beyond the established timeframes otherwise specified by the incentive program Handbook. The PBI incentive payment extension period will be equivalent to the same period the system energy production data is unavailable. In situations where a communications issue results in missing data but the data is retrieved at a later date, the Program Administrator will accept the retrieved data and process payment for the recovered data with the next payment period and no extensions of the PBI incentive payment period will be necessary. To submit a Data Report relative to missing data, the PDP will resubmit the respective Data Report, thereby replacing the previous incomplete report with a complete month of data.

PDP Non-Performance

The Program Administrator will not issue incentive payments to customers based on estimated data from the PDP, nor will the Program Administrator estimate incentive payments under any circumstances. It is the PDP's responsibility to

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ensure timely (+ 5 days after the end of the specified reporting period) and accurate posting of validated performance data so customer incentive payments can be made.

The following conditions may result in penalties, suspension of activity, or revocation of PDP approval from the Program Administrator:

- Data not posted by specified date (10% of accounts serviced by PDP over a one month period are late).
- No data received for incentive period (per customer: no data posted 2 times consecutively OR 3 times in 6 months; and/or per PDP: no data posted for 10% of accounts serviced by PDP). Submittal of corrected data or previously missing monthly data must be received in cycle sequence.
- Data not validated in accordance with program requirements over the course of the CSI Program. (1 time)
- Estimated data posted instead of actual data. (1 time)
- Meter change information not reported within 30 days of the meter change. (3 times within 6 months)
- If an audit or investigation shows a discrepancy of $\pm 5\%$ between the PDP reported data and Program Administrator check meter production data for one data report period. This discrepancy will trigger an audit schedule set by the Program Administrator for the PDP.

The PDP will be given reasonable opportunity to correct problems identified by the Program Administrator. The Program Administrator will work with the PDP to correct any such problems and avoid unnecessary delays in issuing incentive payments to customers, to the extent feasible. However, if the PDP fails to resolve any issues to the Program Administrator's satisfaction within 60 days which result in delays in incentive payments to customers, the following penalties may apply:

- If the problem is with a single or less than 20% of customer accounts served by the PDP, the Program Administrator will suspend PDP activity with just those affected customers. The affected customers will be notified that the PDP has been unable to resolve the specified issue within an acceptable timeframe and they will be given a 30 day grace period to select and engage with another PDP. The original PDP will be required to transfer all historical data to the newly selected PDP. No incentive payments will be made until the customer provides a contract or similar document proving they are engaged with another PDP, but the customer's incentive payment period will be extended beyond the established period allowed under the applicable program rules to

- compensate for this interruption in payments. If the customer fails to engage with and provide proof that they have contracted with a new PDP within the allowable grace period, the time between the grace period expiration date and the date the Program Administrator receive such proof will be deducted from the established payment period.
- If the problem is of a more serious nature as determined by the Program Administrator and continues over 60 days, or it affects more than 20% of customers served by the PDP, the PDP's approval will be revoked and all customers will be notified that they must select another PDP. As above, no incentive payments will be made until the customer selects another PDP, but the customers' incentive payment period will be extended beyond the established payment period. The PDP will be eligible to reapply after six months upon demonstrating that they have successfully resolved all problems to the Program Administrator's satisfaction.
 - If an audit or investigation shows a discrepancy between the PDP reported data and data obtained by the Program Administrator for a specific customer that is greater than +/-5% and within the last three months of the PBI payment cycle, the PDP will be responsible for reimbursing the customer or Program Administrator for any such difference if it is determined that the difference is due to PDP error. The PDP will also be put on an audit schedule by the Program Administrator. If a third audit uncovers any discrepancy due to PDP error, the PDP's approval will be revoked and the customer given an opportunity to select another PDP as described above. Audits may be conducted as stated in the CSI Handbook Section 3.4.3.

Unless the PDP's actions results in revocation, upon receipt of a notice from the PA with respect to the PDP's failure to provide the performance, the PDP must, as soon as reasonably practicable: (1) perform a root-cause analysis to identify the cause of such a failure; (2) provide the PA with a report detailing the cause of, and procedure for correcting such failure within 3 days of completion of such root-cause analysis; (3) implement such procedure after obtaining the respective PA approval of such procedure.

Criteria for a PDP Appeals Process

Should the PDP disagree with a PA decision regarding a penalty, the PDP has the right to appeal to the CSI Working Group for further consideration.

APPLICATION PROCESS

Application & Documentation

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The PDP applicant completes the attached “Application for PDP Services” and provides all documentation in the attached checklist. Note that the PDP applicant must submit separate applications to and successfully complete the data transfer test described later in this document for each utility or Program Administrator.

In PG&E’s service territory, the PDP applicant forwards the completed application and required documentation to:

Application & Documentation

The PDP applicant completes the attached “Application for PDP Services” and provides all documentation in the attached checklist. Note that the PDP applicant must submit separate applications to and successfully complete the data transfer test described later in this document for each utility or Program Administrator.

In PG&E’s service territory, the PDP applicant forwards the completed application and required documentation to:

Mail to: Program Manager, California Solar Initiative
Pacific Gas & Electric Co.
P.O. Box 770000
San Francisco, CA 94177-0001

For questions, contact: Program Manager, California Solar Initiative
Phone: (415) 973-3480
Fax: (415) 973-2510
Email: SolarPBI@pge.com
Web: www.pge.com/csi

In SCE’s service territory, the PDP applicant forwards the completed application and required documentation to:

Mail to: Program Manager, California Solar Initiative
Southern California Edison
6042A Irwindale Ave
Irwindale, CA 91702

For questions, contact: Program Manager, California Solar Initiative
Phone: (866)-584-7436
Fax: (626) 633-3402
Email: pbi@sce.com
Web: www.sce.com/rebatesandsavings/CaliforniaSolarInitiativ

e/

In San Diego Gas & Electric's service territory, the PDP applicant forwards the completed application and required documentation to:

Mail to: California Center for Sustainable Energy
Attn: CSI Program Manager
8690 Balboa Avenue Suite 100
San Diego, CA 92123

For questions, contact: California Solar Initiative Program Manager
Phone: (858) 244-1177
Fax: (858) 244-1178
Email: csi@energycenter.org
Web: www.energycenter.org

The Program Administrator will review the submitted documentation, determine if the PDP applicant meets the program requirements and notify the PDP applicant via email. The Program Administrator will review the application and respond to the PDP applicant within 10 business days.

Data Transfer Test

Once the Program Administrator has reviewed and accepted the prospective PDP's application, they will contact the PDP applicant to schedule a data transfer test.

Program Administrators will provide PDP applicants with test data sets that the prospective PDP must download, validate, and format before submitting the Data Report back to the Program Administrator via secure FTP. The PDP applicant is also responsible for downloading the Program Administrator's EDI 867 Implementation Guide and Tutorials from its website. The PDP must contact their respective Program Administrator for specific instructions regarding this testing process.

The Program Administrator will check the test file to ensure it complies with the guidelines and notify the PDP applicant within 5 business days. Once the PDP is notified it has passed the test, the PDP is considered qualified. If the PDP applicant fails the test, they will be given 2 weeks to resolve any technical or data format issues. If a PDP applicant fails their Data Transfer Test with any individual CSI PA more than 3 times, they will not be eligible to add any additional customers in that PAs service territory until such PDP applicant passes the Data Transfer Test.

PDP Approval Initial Audit Period

Upon PA approval of the required PDP application documentation, and successful completion of the PDP data test procedures, the PDP will be qualified to provide PBI data to the Program Administrator for incentive payment. However, the PA's will audit the raw production data from each PDP's first data report for their first three customers for compliance with these PDP requirements. The PA will notify the PDP of noncompliance and will work to assist the PDP with resolving the issues.

Application to Provide PDP Services

This application and the attached documents are to be used by applicants for approval as a Performance Data Provider (PDP). Please refer to the checklist to ensure your application includes all applicable documentation.

Company Name: _____

Primary Contact: _____

Address: _____ Address 2: _____

City: _____ State: _____ ZIP: _____

Phone: (____) ____ - _____ Fax: (____) ____ - _____

Email: _____

Technical Support Contact

Contact Name: _____

Phone: (____) ____ - _____ Email: _____

Customer Support Contact

Contact Name: _____

Phone: (____) ____ - _____ Email: _____

PDP APPLICATION CHECKLIST

Background

- o Company background (years in business, number of employees, general description, executive team, etc.)
- o Meter data reading and reporting experience and capabilities, capacity, technology overview, IT capabilities, etc.
- o Proof of sufficient bond or insurance coverage

Procedures

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- o Meter reading and data retrieval procedures
- o Data communication (frequency, scalability, types, troubleshooting, etc.)
- o Process for retrieving missed reads
- o Data validation procedures
- o Technical Support (hours of operations, staff levels, procedures, etc.)
- o Customer Support (hours of operations, staff levels, etc.)

IT Systems and Processes

- o Data posting (data translation, formatting, firewall access, etc.)
- o Data retention plan
- o Backup and recovery plans
- o Hardware and software scalability plans
- o Data confidentiality and security procedures

By signing this document, the applicant agrees to comply with all program requirements including those described in the CSI Handbook (signature must be someone with legal authority at the PDP). Additionally, applicant agrees to keep confidential all data received from the PA for testing. Information in this document will remain confidential.

Signature: _____ Date: _____

Printed Name: _____

_____ Title: _____

ATTACHMENT A**CSI Data Validation Rules**

Check	Purpose
Time Check of Meter Reading Device/system	Check for time drift of meter reading device/system outside standard
Meter ID Check	Check for the following: <ul style="list-style-type: none"> • Meter ID reported correctly • Meter has not been changed out • Data is being reported for correct meter
Time Check of Meter	Check for time drift of meter clock outside standard
Pulse Overflow Check	Check for the following:

	<ul style="list-style-type: none">• Improper scaling factor in meter• Improperly sized transformer• Hardware problem
Test Mode Check	Check that data collected when meter was in test mode represents test production rather than actual production
Sum Check	<p>Check for the following in combination meter/recorder installations:</p> <ul style="list-style-type: none">• Crossed channels between meter & recorder• Pulse relay problems <p>Check for the following in all installations:</p> <ul style="list-style-type: none">• Invalid PT & CT ratios• Invalid meter constants

ATTACHMENT B

**REQUEST FOR TEMPORARY WAIVER OF EDI 867 REQUIREMENTS
UNDER INTERIM CSI PBI DATA TRANSFER RULES**

Prior to formal approval of the PDP Guidelines, PDP applicants may request a temporary waiver of the EDI 867 data transfer protocol and interim 15-minute interval data reporting requirements. It is expected that the PDP applicant will use this time to develop the capability to meet these requirements.

PDP applicants who are unable to meet the full EDI 867 data transfer protocol requirement by the date specified in the final version of the PDP Guidebook will have their PDP qualification revoked.

PDP applicants requesting a temporary waiver of the EDI 867 data transfer protocol and/or interim 15-minute interval data reporting requirements must use the attached spreadsheet template. Interim CSI PBI Data Transfer Rules are also attached.

_____ hereby requests a temporary waiver from the following requirements:

- ☐ EDI 867
- ☐ 15-Minute Interval Data Reporting

We understand that this request is only for a temporary waiver and we agree to comply with all program requirements, including the 15-minute interval data and EDI 867 data transfer protocol requirements, the date to be specified in a final version of the PDP Guidebook or sooner.

PDP NAME:

CONTACT PERSON:

AUTHORIZED SIGNATURE: _____ DATE:

Implementation Guide - Transaction Set 867 - Version 006 (CSI Specification)

28th April 2008

ST•867•000000984^a The ST is the start of the 867 Transaction Set with a control number of 000000984

BPT•00•2007-04-21-09.01.08.795475•20000421•C1••••1948•1^a The BPT marks the Beginning Segment for Product Transfer and Resale where 00 is an Original data transmitted, C1 Indicates interval data value and 1 indicates cycle shift number (1 – 1st to 1st of next month, 2 – 16th to 16th of next month)

N1•55••1•006908818••41^a Identifies the Performance Data Provider (PDP) as a uniquely assigned number that is provided by SCE

REF•10•SCE-CSI-36949^a Identifies the CSI Project ID

REF•BT•23^a Indicates Cycle number (Report number for SCCE)

REF•59•2007-04-21-09.01.08.795434^a Identifies the prior unique transaction BPT02 number **2007-04-21-09.01.08.795434** to be corrected. Only used when BPT01=CO

PTD•PM•••OZ•EL^a Identifies the type of product transfer to be physical meter information, and the product reference Identification indicates Electric Service

DTM•150••••DT•200801010000^a January 01, 2008 is the Service Period Start Date. All dates are expressed in Greenwich Mean Time (GMT).

DTM•151••••DT•200802010000^a February 01, 2008 is the Service Period End Date. All dates are expressed in Greenwich Mean Time (GMT).

REF•JH•A^a Indicates Energy is generated by the end use Customer (Addition)

REF•6W•1^a Indicates channel ID (1 for SCE)

REF•MG•O717K-001388^a The Meter Number is O717K-001388

REF•MT•KH015^a The Meter Data Type is Monthly Kilowatt Hour and 15 indicates 15 minutes interval data

QTY•32•24709^a The KWH data for each 15 minutes interval

DTM•151••••DT•200801010015^a January 01, 2008 12:15 am is the Interval end time Date.

QTY•32•2345^a The KWH data for each 15 minutes interval

DTM•151••••DT•200801010030^a January 01, 2008 12:30 am is the Interval end time Date.

QTY•32•3734^a The KWH data for each 15 minutes interval

DTM•151••••DT•200801010045^a January 01, 2008 12:45 am is the Interval end time Date.

QTY•32•1232^a The KWH data for each 15 minutes interval

DTM•151••••DT•200801010100^a January 01, 2008 01:00 am is the Interval end time Date.

QTY•32•1535^a The KWH data for each 15 minutes interval

DTM•151••••DT•200801010115^a January 01, 2008 01:15 am is the Interval end time Date.

QTY•32•1535^a The KWH data for each 15 minutes interval

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DTM•151••••DT•200801010130^a January 01, 2008 01:30 am is the Interval end time Date.

QTY•32•1535^a The KWH data for each 15 minutes interval

DTM•151••••DT•200801010145^a January 01, 2008 01:45 am is the Interval end time Date.

QTY•32•1535^a The KWH data for each 15 minutes interval

DTM•151••••DT•200801010200^a January 01, 2008 02:00 am is the Interval end time Date.

QTY•32•1235^a The KWH data for each 15 minutes interval

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Implementation Guide - Transaction Set 867 - Version 006 (CSI Specification)

Southern California Edison 28th April 2008

DTM•151••••DT•200801010215^a January 01, 2008 02:15 am is the Interval end time Date.

..

..

..

..

QTY•32•1235^a The KWH data for each 15 minutes interval

DTM•151••••DT•200802010000^a February 01, 2008 is the Interval end time Date.

SE•209•000000984^a Total Number of Segments is 209, Control Number is 000000984

PDF Created

867 Product Transfer and Resale Report

Functional Group ID=**PT**

Introduction:

This Draft Standard for Trial Use contains the format and establishes the data contents of the Product Transfer and

Resale Report Transaction Set (867) for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to: (1) report information about product that has been transferred

from one location to another; (2) report sales of product from one or more locations to an end customer; or (3)

report sales of a product from one or more locations to an end customer, and demand beyond actual sales (lost

orders). Report may be issued by either buyer or seller.

Heading:

Pos. Seg. Req. Loop Notes and

No. ID Name Des. Max.Use Repeat Comments

Must Use 010 ST Transaction Set Header M 1

Must Use 020 BPT Beginning Segment for Product Transfer and Resale

M 1

LOOP ID - N1 5

Must Use 080 N1 Name O 1

Must Use 120 REF Reference Identification O 12

Detail:

Pos. Seg. Req. Loop Notes and

No. ID Name Des. Max.Use Repeat Comments

LOOP ID - PTD >1

Must Use 010 PTD Product Transfer and Resale Detail M 1

Must Use 020 DTM Date/Time Reference O 10

Must Use 030 REF Reference Identification O 20

LOOP ID - QTY >1

Must Use 110 QTY Quantity O 1

210 DTM Date/Time Reference O 10

Summary:

Pos. Seg. Req. Loop Notes and

No. ID Name Des. Max.Use Repeat Comments

Must Use 030 SE Transaction Set Trailer M 1

Segment: **ST** Transaction Set Header

Position: 010

Loop:

Level: Heading:

Usage: Mandatory

Max Use: 1

Purpose: To indicate the start of a transaction set and to assign a control number

Syntax Notes:

Semantic Notes: 1 The transaction set identifier (ST01) used by the translation routines of the interchange partners to select the appropriate transaction set definition (e.g., 810 selects the Invoice Transaction Set).

Comments:

Data Element Summary

Ref. Data

Des. Element Name Attributes

ST01 143 Transaction Set Identifier Code M ID 3/3

Code uniquely identifying a Transaction Set

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867 Product Transfer and Resale Report

ST02 329 Transaction Set Control Number M AN 4/9

Identifying control number that must be unique within the transaction set functional group assigned by the originator for a transaction set

Segment: BPT Beginning Segment for Product Transfer and Resale**Position:** 020**Loop:****Level:** Heading:**Usage:** Mandatory**Max Use:** 1**Purpose:** To indicate the beginning of the Product Transfer and Resale Report Transaction Set and transmit identifying data**Syntax Notes:****Semantic Notes:** 1 BPT02 identifies the transfer/resale number.

2 BPT03 identifies the transfer/resale date.

3 BPT08 identifies the transfer/resale time.

4 BPT09 is used when it is necessary to reference a Previous Report Number.

Comments: BPT01 = 07 is used if previously furnished information is being provided in a new file. In this case, or if data points have been corrected, only the corrected meters' data need to be provided, even if multiple meters were originally sent. If a previously transmitted file is simply being reposted for download from a server, the original designation of BPT01 = 00 or CO does not need to be changed.

Data Element Summary**Ref. Data****Des. Element Name Attributes**Must Use **BPT01 353 Transaction Set Purpose Code M ID 2/2**

Code identifying purpose of transaction set

00 Original

Conveys original readings for the account being reported.

52 Response to Historical Inquiry

Response to a request for historical meter reading.

CO Corrected

Indicates that the readings previously reported for the account are being corrected.

Must Use **BPT02 127 Reference Identification O AN 1/30**

Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier

A unique transaction identification number, assigned by the originator.

Must Use **BPT03 373 Date M DT 8/8**

Date when the PDP record is created by the application (CCYYMMDD)

Must Use **BPT04 755 Report Type Code O ID 2/2**

Code indicating the title or contents of a document, report or supporting item

C1 Cost Data Summary

Interval values

Must Use **BPT08 337 Time O TM 4/8**

Time when the PDP record is created by the application (HHMM)

Must Use **BPT09 127 Reference Identification O AN 1/30**

Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier.

Will represent Cycle shift number (1 or 2)

Segment: N1 Name**Position:** 080**Loop:** N1**Level:** Heading:

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Usage: Optional (Must Use)**Max Use:** 1**Purpose:** To identify a party by type of organization, name, and code**Syntax Notes:** 1 At least one of N102 or N103 is required.

2 If either N103 or N104 is present, then the other is required.

Semantic Notes:**Comments:** 1 This segment, used alone, provides the most efficient method of providing organizational identification. To obtain this efficiency the "ID Code" (N104) must provide a key to the table maintained by the transaction processing party.

2 Three N1 segments will be used in California, with N101 = 55, 8S, and SJ, unless the values of N104 corresponding to N101 = 8S or SJ would duplicate the value corresponding to N101 = 55. The end-use customer's account numbers for the meter data management agent (N101 = 55), utility (N101 = 8S), and the energy service provider (N101 = SJ) must be placed in REF segments following these N1 segments, with REF01 = 10, 12, and 11, respectively.

3 When N101 = 55 (Meter Data Management Agent), N106 = 41 (Submitter). When N101 = 8S (Utility) and SJ (Energy Service Provider), N106 = 40 (Receiver).

Data Element Summary**Ref. Data****Des. Element Name Attributes**Must Use **N101 98 Entity Identifier Code M ID 2/3**

Code identifying an organizational entity, a physical location, property or an individual

>> 55 Used to identify the party that manages meter data on behalf of another. Often referred to as the Performance Data Provider (PDP).

Must Use **N103 66 Identification Code Qualifier X ID 1/2**

Code designating the system/method of code structure used for Identification Code (67)

1 SCE Assigned PDP identification code

Must Use **N104 67 Identification Code X AN 2/80**

PDP identification number assigned by SCE

Must Use **N106 98 Entity Identification Code O ID 2/3**

Code identifying an organizational entity, a physical location, property or an individual

41 Submitter

Entity transmitting transaction set

Segment: REF Reference Identification**Position:** 120**Loop:** N1**Level:** Heading:**Usage:** Optional (Must Use)**Max Use:** 12**Purpose:** To specify identifying information**Syntax Notes:** 1 At least one of REF02 or REF03 is required.**Semantic Notes:****Comments:** See Comments related to the N1 segment.**Data Element Summary****Ref. Data****Des. Element Name Attributes**Must Use **REF01 128 Reference Identification Qualifier M ID 2/3**

Code qualifying the Reference Identification

10 Account manager Code (This will be used as CSI

Project ID)

BT Reference Identifier

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Indicates Cycle number/Report Number

59 Prior Incorrect Batch Number

Only used when BPT01= CO

REF02 127 Reference Identification X AN 1/30

Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier

Reference the value of BPT02 for file already transmitted but intended for correction

Segment: PTD Product Transfer and Resale Detail

Position: 010

Loop: PTD

Level: Detail:

Usage: Mandatory

Max Use: 1

Purpose: To indicate the start of detail information relating to the transfer/resale of a product and provide identifying data

Syntax Notes: 1 If either PTD04 or PTD05 is present, then the other is required.

Semantic Notes:

Comments: 1 The PTD loop conveys consumption information for one meter or register, and for one commodity for metered service, over a number of metering intervals. Accounts which have multiple meters or registers require multiple PTD loops; the total consumption from multiple meters may be summarized in another PTD loop, qualified by SU, at the option of the Meter Data Management Agent. Accounts which have multiple services (e.g., both electric and gas) or multiple metered commodities require separate PTD loops for each service or commodity. For unmetered service, multiple commodities may be reported in a single PTD loop.

Data Element Summary**Ref. Data****Des. Element Name Attributes**

Must Use **PTD01 521 Product Transfer Type Code M ID 2/2**

Code identifying the type of product transfer

PM Physical Meter Information, including data from a meter, totalizer, or recorder.

Must Use **PTD04 128 Reference Identification Qualifier X ID 2/3**

Code qualifying the Reference Identification provided in PTD05.

OZ Product Number

Must Use **PTD05 127 Reference Identification X AN 1/30**

Reference information as defined for a particular Transaction Set or as specified by the Reference Information Qualifier.

EL Electric Service

Segment: DTM Date/Time Reference

Position: 020

Loop: PTD

Level: Detail:

Usage: Optional

Max Use: 10

Purpose: To specify pertinent dates and times

Syntax Notes: 1 At least one of DTM02 DTM03 or DTM06 is required.

2 If either DTM05 or DTM06 is present, then the other is required.

Semantic Notes:**Comments:****Notes:****Data Element Summary****Ref. Data**

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Des. Element Name AttributesMust Use **DTM01 374 Date/Time Qualifier M ID 3/3**

Code specifying type of date or time, or both date and time

150 Service Period Start

151 Service Period End

MRR Meter Reading

Date of special meter read

Must Use **DTM05 1250 Date Time Period Format Qualifier X ID 2/3**

Code indicating the date format, time format, or date and time format

DT Date and Time Expressed in Format

CCYYMMDDHHMM

Must Use **DTM06 1251 Date Time Period X AN 1/35**

Expression of a date, a time, or range of dates, times or dates and times

Segment: REF Reference Identification**Position:** 030**Loop:** PTD**Level:** Detail:**Usage:** Optional**Max Use:** 20**Purpose:** To specify identifying information**Syntax Notes:** 1 At least one of REF02 or REF03 is required.**Comments:** 1 A segment containing REF01 = LU is required if PTD01 = PM

2 Segment containing REF01 = MG and MT is required unless the service delivery point is unmetered, in which case a segment containing REF01 = SC is required.

3 For interval data, the metering interval corresponding to REF01 = MT must be the same for all PTD loops.

Data Element Summary**Ref. Data****Des. Element Name Attributes**Must Use **REF01 128 Reference Identification Qualifier M ID 2/3**

Code qualifying the Reference Identification

6W Sequence Number

Identifies channel number (identifier) when there is more than one channel on a meter measuring the same quantity (e.g., two kWh channels).

>> JH Tag

Meter Role. Valid values for REF02 are:

A = Additive (this consumption contributes to the total for the account),

I = Ignore (this consumption does not contribute to the total for the account - do nothing),

S = Subtractive (this consumption must be subtracted from the total for the account).

MG Meter Number

MT Meter Data Type (see examples in REF02)

REF02 127 Reference Identification X AN 1/30

Reference information as defined for a particular Transaction Set or as specified by the Reference Identification Qualifier

When REF01 is MT, the meter type is expressed as a 5-character field that identifies the type of consumption measured by this meter and the interval between measurements. The first two characters are the type of consumption, expressed in the units of measure from Data Element 355, as follows:

1N Count

Indicates meter pulses

70 Volt

SCE AL 2258-E and AL 2265-E/NLC

BY British Thermal Unit (BTU)

CF Cubic Feet

EA Each

HH Hundred Cubic Feet

K1 Kilowatt Demand

Represents potential power load measured at
predetermined intervals

K2 Kilovolt Amperes Reactive Demand

Reactive power that must be supplied for specific types
of customer's equipment; billable when kilowatt
demand usage meets or exceeds a defined parameter

K3 Kilovolt Amperes Reactive Hour

Represents actual electricity equivalent to kilowatt
hours; billable when usage meets or exceeds defined
parametersPDF Created with deskPDF PDF Writer - Trial :: <http://www.docudesk.com>

CA 867 (006) 99 April. 28, 2008

K4 Kilovolt Amperes

Measure of electrical power

KH Kilowatt Hour

TD Therms

TZ Thousand Cubic Feet

The 3-character metering interval is expressed as one of the following values:

Nnn = number of minutes from 001 to 999, DAY = daily, or MON = monthly.

For example, KHM0N represents KWH per month, K1MON represents
maximum kW demand during the month, and KH015 represents kWh per 15
minutes interval.

When REF01 is LU, REF02 is not used.

Segment: QTY Quantity**Position:** 110**Loop:** QTY**Level:** Detail:**Usage:** Optional (Must Use)**Max Use:** 1**Purpose:** To specify quantity information**Syntax Notes:** 1 At least one of QTY02 or QTY04 is required.

2 Only one of QTY02 or QTY04 may be present.

Semantic Notes: 1 QTY04 is used when the quantity is non-numeric.**Comments:** 1 Each QTY/MEA/DTM loop conveys consumption information about one metering
interval. QTY02 reports billable quantities, including demands, while MEA05 and
MEA06 report meter readings that are used to determine the billable quantities.2 If MEA03 contains a multiplier, QTY02 equals the product of the multiplier and
the meter readings reported in MEA05 and MEA06. Until it is resolved by UIG
whether a MEA segment containing a multiplier (MEA02 = MU) can also contain
meter reads, it is recommended that the multiplier should be placed in a separate
MEA segment within the QTY loop.3 QTY03 is not required if the unit of measurement has been defined by the REF02
value corresponding to REF01 = MT.**Data Element Summary****Ref. Data****Des. Element Name Attributes**Must Use **QTY01 673 Quantity Qualifier M ID 2/2**

32 Quantity Sold

Normal data transmission (not estimated, adjusted, or
anomalous)

SCE AL 2258-E and AL 2265-E/NLC

Must Use **QTY02 380 Quantity X R 1/15**

The value specifying interval read in KH

Segment: DTM Date/Time Reference

Position: 210

Loop: QTY

Level: Detail:

Usage: Optional

Max Use: 10

Purpose: To specify pertinent dates and times

Syntax Notes: 1 At least one of DTM02 DTM03 or DTM06 is required.

2 If either DTM05 or DTM06 is present, then the other is required.

Semantic Notes:

Comments:

Notes: This segment may be sent to establish the date and time of the reported values, if the applicable data are available and desired by the recipient. For interval data, the ending time of each interval should be reported if the sender or receiver requires these data

Data Element Summary

Ref. Data

Des. Element Name Attributes

DTM01 374 Date/Time Qualifier M ID 3/3

Code specifying type of date or time, or both date and time

151 Service Period End

DTM05 1250 Date Time Period Format Qualifier X ID 2/3

Code indicating the date format, time format, or date and time format

DT Date and Time Expressed in Format

CCYYMMDDHHMM

DTM06 1251 Date Time Period X AN 1/35

Expression of a date, a time, or range of dates, times or dates and times

Segment: SE Transaction Set Trailer

Position: 030

Loop:

Level: Summary:

Usage: Mandatory

Max Use: 1

Purpose: To indicate the end of the transaction set and provide the count of the transmitted segments (including the beginning (ST) and ending (SE) segments)

Syntax Notes:

Semantic Notes:

Comments: 1 SE is the last segment of each transaction set.

Data Element Summary

Ref. Data

Des. Element Name Attributes

SE01 96 Number of Included Segments M N0 1/10

Total number of segments included in a transaction set including ST and SE Segments

SE02 329 Transaction Set Control Number M AN 4/9

Identifying control number that must be unique within the transaction set functional group assigned by the originator for a transaction set

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3298



OCTOBER 6, 2008

I.D. # 7989
RESOLUTION E-4205
Commission Meeting November 6, 2008

TO: PARTIES TO RULEMAKING 08-03-008

Enclosed is draft Resolution Number E-4205 of the Energy Division. It will be on the agenda at the November 6, 2008 Commission meeting. The Commission may then vote on this Resolution or it may postpone a vote until later.

When the Commission votes on a draft Resolution, it may adopt all or part of it as written, amend, modify or set it aside and prepare a different Resolution. Only when the Commission acts does the Resolution become binding on the parties.

Parties may submit comments on the draft Resolution.

An original and two copies of the comments, with a certificate of service, should be submitted to:

Honesto Gatchalian
Energy Division
California Public Utilities Commission
505 Van Ness Avenue
San Francisco, CA 94102
Fax: 415-703-2200

A copy of the comments should be submitted in electronic format to:

Nicolas Chaset
Energy Division
California Public Utilities Commission
505 Van Ness Avenue
San Francisco, CA 94102
Email: nlc@cpuc.ca.gov

Any comments on the draft Resolution must be received by the Energy Division by October 26, 2008. Those submitting comments must serve a copy of their comments on 1) the entire service list attached to the draft Resolution, 2) all Commissioners, and 3) the Chief Administrative Law Judge, and 4) the General Counsel on the same date that the comments are submitted to the Energy Division.

Comments shall be limited to fifteen pages in length and should list the recommended changes to the draft Resolution.

Comments shall focus on factual, legal or technical errors in the proposed draft Resolution. Comments that merely reargue positions taken in the advice letter or protests will be accorded no weight and are not to be submitted.

Replies to comments on the draft resolution may be filed (i.e., received by the Energy Division) on October 31, 2008, five days after comments are filed, and shall be limited to identifying misrepresentations of law or fact contained in the comments of other parties. Replies shall not exceed five pages in length, and shall be filed and served as set forth above for comments.

Late submitted comments or replies will not be considered.

Meredith Sterkel, Program and Project Supervisor
Energy Division

Enclosure: Service List
Certificate of Service

CERTIFICATE OF SERVICE

I certify that I have by mail this day served a true copy of Draft Resolution E-4205 on all parties in these filings or their attorneys as shown on the attached list.

Dated October 6, 2008 at San Francisco, California.

Nicolas Chaset

NOTICE

Parties should notify the Energy Division, Public Utilities
Commission, 505 Van Ness Avenue, Room 4002
San Francisco, CA 94102, of any change of address to
insure that they continue to receive documents. You
must indicate the Resolution number on the service list
on which your name appears.

Service List for Resolution E-4205

DONALD GILLIGAN
PRESIDENT
NATIONAL ASSOCIATION OF ENERGY SERVICE
610 MOUNTAIN STREET
SHARON, MA 02067
FOR: NAESCO

DAVID KOPANS
FAT SPANIEL TECHNOLOGIES, INC.
2 PRINCETON ROAD
ARLINGTON, MA 02474
FOR: FAT SPANIEL TECHNOLOGIES, INC.

MICHAEL O. BROWN
VP BUSINESS DEVELOPMENT AND GEN COUNSEL
UTC POWER CORPORATION
195 GOVERNORS HIGHWAY
SOUTH WINDSOR, CT 06074
INC.
FOR: UTC POWER CORPORATION

STEVEN HUHMANN
MORGAN STANLEY CAPITAL GROUP INC.
2000 WESTCHESTER AVENUE
PURCHASE, NY 10577
FOR: MORGAN STANLEY CAPITAL GROUP,

STEVEN D. PATRICK
ATTORNEY AT LAW
SOUTHERN CALIFORNIA GAS COMPANY
555 WEST FIFTH STREET, GT14E7
LOS ANGELES, CA 90013-1011
FOR: SAN DIEGO GAS & ELECTRIC

LISA ROSEN
SECRETARY
ENERGY EFFICIENCY SOLAR
308 W. MONTEREY AVENUE
POMONA, CA 91768
FOR: ENERGY EFFICIENCY SOLAR

ANNETTE GILLIAM
ATTORNEY AT LAW
SOUTHERN CALIFORNIA EDISON COMPANY
2244 WALNUT GROVE AVENUE
ROSEMEAD, CA 91770
FOR: SOUTHERN CALIFORNIA EDISON COMPANY
COMPANY

MICHAEL D. MONTOYA
ATTORNEY AT LAW
SOUTHERN CALIFORNIA EDISON COMPANY
2244 WALNUT GROVE AVENUE
ROSEMEAD, CA 91770
FOR: SOUTHERN CALIFORNIA EDISON

SCOTT DEBENHAM
DEBENHAM ENERGY LLC
11317 VALLE VISTA ROAD
LAKESIDE, CA 92040
FOR: DEBENHAM ENERGY, LLC

MICHAEL P. CALABRESE
ATTORNEY AT LAW
CITY ATTORNEY, CITY OF SAN DIEGO
1200 THIRD AVENUE, SUITE 1100
SAN DIEGO, CA 92101
FOR: CITY OF SAN DIEGO

DONALD C. LIDDELL
DOUGLASS & LIDDELL
2928 2ND AVENUE
ENERGY
SAN DIEGO, CA 92103
FOR: VRB POWER SYSTEMS INC., ICE ENERGY
INC.
SUSTAINABLE

ANDREW MCALLISTER
DIRECTOR OF PROGRAMS
CALIFORNIA CENTER FOR SUSTAINABLE

8690 BALBOA AVENUE, SUITE 100
SAN DIEGO, CA 92123
FOR: CALIFORNIA CENTER FOR

ENERGY

KIRK MULLIGAN

TAM HUNT

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November 6, 2008

CLEAN POWER SYSTEMS
13230 EVENING CREEK DR. SOUTH, STE 203
SAN DIEGO, CA 92128
FOR: CLEAN POWER SYSTEMS

COUNCIL

ENERGY PROGRAM DIRECTOR/ATTORNEY
COMMUNITY ENVIRONMENTAL COUNCIL
26 W. ANAPAMU, 2ND FLOOR
SANTA BARBARA, CA 93101
FOR: COMMUNITY ENVIRONMENTAL

TAMLYN M. HUNT
ENERGY PROGRAM DIRECTOR
COMMUNITY ENVIRONMENTAL COUNCIL
26 W. ANAPAMU ST., 2ND FLOOR
SANTA BARBARA, CA 93101
FOR: COMMUNITY ENVIRONMENTAL COUNCIL

JANIS PEPPER
SUNFUND CORPORATION
PO BOX 3206
LOS ALTOS, CA 94024
FOR: SUNFUND CORPORATION

SUZANNE H. EMERSON
EMERSON ENVIRONMENTAL, LLC
160 PLYMOUTH AVENUE
SAN CARLOS, CA 94070-1621
FOR: EMERSON ENVIRONMENTAL, LLC

MARCEL HAWIGER
ATTORNEY AT LAW
THE UTILITY REFORM NETWORK
711 VAN NESS AVENUE, SUITE 350
SAN FRANCISCO, CA 94102
FOR: TURN

CHRISTOPHER CLAY
CALIF PUBLIC UTILITIES COMMISSION
LEGAL DIVISION
ROOM 4300
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214
FOR: DRA

STEPHEN A. S. MORRISON
CITY & COUNTY OF SAN FRANCISCO
CITY HALL, RM 234
1 DR CARLTON B. GOODLET PLACE
SAN FRANCISCO, CA 94102-4682
FOR: CITY & COUNTY OF SAN FRANCISCO

MATT GOLDEN
SUSTAINABLE SPACES, INC.
1167 MISSION STREET
CORPORATION
SAN FRANCISCO, CA 94103
FOR: SUSTAINABLE SPACES INC

JENNIFER SOMERS
PROGRAM OFFICER: GREEN CONNECTION
LOCAL INITIATIVES SUPPORT

369 PINE STREET, STE. 350
SAN FRANCISCO, CA 94104
FOR: LOCAL INITIATIVES SUPPORT
CORPORATION (LISC)

NORA SHERIFF
ATTORNEY AT LAW
ALCANTAR & KAHL, LLP
120 MONTGOMERY STREET, SUITE 2200
SAN FRANCISCO, CA 94104
FOR: ENERGY PRODUCERS & USERS COALITION

CRAIG LEWIS
VP OF GOV. RELATIONS
GREENVOLTS
50 FIRST STREET, SUITE 507
SAN FRANCISCO, CA 94105
FOR: GREENVOLTS

ADAM BROWNING
THE VOTE SOLAR INITIATIVE
300 BRANNAN STREET, SUITE 609
SAN FRANCISCO, CA 94107
FOR: VOTE SOLAR INITIATIVE

SHANNON KOFFMAN
POWERBAB
1812 POLK STREET
SAN FRANCISCO, CA 94109
FOR: POWERBAB

ENRIQUE GALLARDO
ATTORNEY AT LAW
LATINO ISSUES FORUM
160 PINE STREET, SUITE 700
SAN FRANCISCO, CA 94111
FOR: LATINO ISSUES FORUM

JOE KARP
ATTORNEY
WINSTON & STRAWN LLP
101 CALIFORNIA STREET
SAN FRANCISCO, CA 94111
FOR: GRID ALTERNATIVES

JOSEPH F. WIEDMAN
ATTORNEY AT LAW
GOODIN MACBRIDE SQUERI DAY & LAMPREY LLP
LAMPREY LLP
505 SANSOME STREET, SUITE 900
SAN FRANCISCO, CA 94111
FOR: SOLAR ALLIANCE

MICHAEL B. DAY
ATTORNEY AT LAW
GOODIN MACBRIDE SQUERI DAY &
LAMPREY LLP
505 SANSOME STREET, SUITE 900
SAN FRANCISCO, CA 94111-3133
FOR: SOLAR ALLIANCE

RANDALL J. LITTENEKER
ATTORNEY AT LAW
PACIFIC GAS AND ELECTRIC COMPANY
PO BOX 7442, B30A
SAN FRANCISCO, CA 94120
AND
FOR: PACIFIC GAS AND ELECTRIC COMPANY

SARA STECK MYERS
ATTORNEY AT LAW
122 28TH AVENUE
SAN FRANCISCO, CA 94121
FOR: CENTER FOR ENERGY EFFICIENCY
RENEWABLE TECHNOLOGIES (CEERT)

BILL BROBECK
BROBECK SOLAR ENERGY LLC
1125 BOLLINGER CANYON ROAD
ASSN
MORAGA, CA 94556
FOR: BROBECK SOLAR ENERGY LLC
INDUSTRIES

SUE KATELEY
EXECUTIVE DIRECTOR
CALIFORNIA SOLAR ENERGY INDUSTRIES
PO BOX 782
RIO VISTA, CA 94571
FOR: CALIFORNIA SOLAR ENERGY
ASSN.

NEHEMIAH STONE
DIRECTOR OF DSM IMPLEMENTATION
ASSN.
KEMA SERVICES, INC.
492 NINTH STREET, SUITE 220
OAKLAND, CA 94607
PERFORMANCE
FOR: KEMA SERVICES

ROBERT L. KNIGHT
CALIFORNIA BUILDING PERFORM. CONT.
1000 BROADWAY, SUITE 410
OAKLAND, CA 94607
FOR: CALIFORNIA BUILDING
CONTRACTOR'S ASSOCIATION

ERICA MACKIE, P.E.
EXECUTIVE DIRECTOR & CO-FOUNDER
GRID ALTERNATIVES
1610 HARRISON STREET, SUITE C
OAKLAND, CA 94612
FOR: GRID ALTERNATIVES

JOSHUA HARRIS
LAW OFFICES OF STEPHAN C. VOLKER
436 14TH STREET, SUITE 1300
OAKLAND, CA 94612
FOR: CARE

KEVIN T. FOX

GREGG MORRIS

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DRAFT

November 6, 2008

KEYES & FOX LLP
5727 KEITH AVENUE
OAKLAND, CA 94618
FOR: INTERSTATE RENEWABLE ENERGY
COUNCIL (IREC)

DIRECTOR
GREEN POWER INSTITUTE
2039 SHATTUCK AVENUE, STE 402
BERKELEY, CA 94704
FOR: GREEN POWER INSTITUTE

THALIA N.C. GONZALEZ
ATTORNEY AT LAW
THE GREENLINING INSTITUTE
1918 UNIVERSITY AVENUE, 2ND FLOOR
BERKELEY, CA 94704
FOR: THE GREENLINING INSTITUTE

JOHN PROCTOR
GENERAL MANAGER
PROCTOR ENGINEERING GROUP
418 MISSION AVENUE
SAN RAFAEL, CA 94901
FOR: PROCTOR ENGINEERING GROUP LTD.

SUSAN E. BROWN
A WORLD INSTITUTE FOR SUSTAINABLE HUMANI
PO BOX 428
MILL VALLEY, CA 94942
FOR: A WISH

JULIE BLUNDEN
SUNPOWER CORPORATION
3939 NORTH FIRST ST.
SAN JOSE, CA 95134
FOR: SUNPOWER CORPORATION

MICHAEL KYES
7423 SHAUN CT.
SEBASTOPOL, CA 95472
FOR: KGA ASSOCIATES LLC

ERIC LEE
SR. ENGINEER
DAVIS ENERGY GROUP
123 C STREET
DAVIS, CA 95616
FOR: DAVIS ENERGY GROUP

MATTHEW KOBER
PYRAMID SOLAR INC.
PO BOX 1358
COLFAX, CA 95713
FOR: PYRAMID SOLAR

LYNN M. HAUG
ATTORNEY AT LAW
ELLISON, SCHNEIDER & HARRIS, LLP
2015 H STREET
SACRAMENTO, CA 95811-3109
FOR: FUEL CELL ENERGY

PATRICK STONER
PROGRAM DIRECTOR
LOCAL GOVERNMENT COMMISSION
DEVELOP.
1303 J STREET, SUITE 250
SACRAMENTO, CA 95814
FOR: LOCAL GOVERNMENT COMMISSION
SERVICES &

RENEE WEBSTER-HAWKINS
CHIEF DEPUTY DIRECTOR
DEPT. OF COMMUNITY SERVICES AND

PO BOX 1947; 700 N 10TH ST., RM 258
SACRAMENTO, CA 95814
FOR: DEPARTMENT OF COMMUNITY

DEVELOPMENT

JAMES L. HODGES
AND ENERGY SERVICES
ASSOCIATION OF CALIFORNIA COMMUNITY
1069 45TH STREET
205
SACRAMENTO, CA 95819
FOR: ASSOCIATION OF CALIFORNIA
COMMUNITY AND ENERGY SERVICES (ACCES)

ANN L. TROWBRIDGE
ATTORNEY AT LAW
DAY CARTER & MURPHY LLP
3620 AMERICAN RIVER DRIVE, SUITE

SACRAMENTO, CA 95864
FOR: CALIFORNIA CLEAN DG COALITION

1.1 Information Only

EMILY N. SMITH
ATTORNEY AT LAW
MCDERMOTT WILL & EMERY LLP
600 THIRTEENTH ST., NW
WASHINGTON, DC 20005

MELISSA R. DORN
MCDERMOTT WILL & EMERY
600 THIRTEENTH STREET, N.W.
WASHINGTON, DC 20005

MICHAEL A. YUFFEE
MCDERMOTT WILL & EMERY LLP
600 THIRTEENTH STREET, N.W.
WASHINGTON, DC 20005-3096

JIM ROSS
RCS, INC.
500 CHESTERFIELD CENTER, SUITE 320
CHESTERFIELD, MO 63017

GARY HINNERS
RELIANT ENERGY, INC.
PO BOX 148
HOUSTON, TX 77001-0148

BURT Y. CHAO
INSTITUTIONAL RESEARCH
SIMMONS & COMPANY INTERNATIONAL
700 LOUISIANA, STE 5000
HOUSTON, TX 77002

JOHN ROHRBACH
RELIANT ENERGY INC
1000 MAIN ST
FLR
HOUSTON, TX 77002

KIRBY BOSLEY
BEAR ENERGY LP
700 LOUISIANA ST. STE 1000, 10TH
HOUSTON, TX 77002

PAUL TRAMONTE
BEAR ENERGY LP
700 LOUISIANA ST., STE 1000, 10TH FLR
HOUSTON, TX 77002

PEARCE HAMMOND
SIMMONS & COMPANY
700 LOUISIANA, STE 5000
HOUSTON, TX 77002

ROBERT HANNA
RELIANT ENERGY INC
1000 MAIN ST SUITE 1100
HOUSTON, TX 77002

BETH BAKER
SUMMIT BLUE CONSULTING
1722 14TH STREET, SUITE 230
BOULDER, CO 80304

TIM MERRIGAN
NATIONAL RENEWABLE ENERGY LABORATORY
DEVELOPMENT
1617 COLE BLVD. M/S 1725
GOLDEN, CO 80401
600

LORRAINE A. PASKETT
VICE PRES., POLICY & MARKET
FIRST SOLAR, INC.
350 WEST WASHINGTON STREET, SUITE
TEMPE, AZ 85281

ROBERT L. PETTINATO
LOS ANGELES DEPARTMENT OF POWER & WATER
NATURAL GAS GROUP
111 NORTH HOPE STREET, ROOM 1151

HUGH YAO
SOUTHERN CALIFORNIA GAS COMPANY
555 W. 5TH ST, GT22G2
LOS ANGELES, CA 90013

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DRAFT

November 6, 2008

LOS ANGELES, CA 90012-0100

ALANA STEELE, ESQ.
HANNA AND MORTON LLP
444 S. FLOWER ST., SUITE 1500
LOS ANGELES, CA 90071-2916

NORMAN A. PEDERSEN, ESQ.
HANNA & MORTON LLP
444 S. FLOWER STREET, SUITE 1500
LOS ANGELES, CA 90071-2916

ARLEEN NOVOTNEY
SOUTHERN CALIFORNIA FORUM
941 PALMS BLVD.
VENICE, CA 90291

SUSAN MUNVES
ENERGY AND GREEN BLDG. PROG. ADMIN.
CITY OF SANTA MONICA
1212 5TH STREET, FIRST FLOOR
SANTA MONICA, CA 90401

TED BARDACKE
SENIOR ASSOCIATE
GLOBAL GEEN USA
2218 MAIN STREET, 2ND FLOOR
SANTA MONICA, CA 90405

REN ZHANG
CITY OF PASADENA WATER AND POWER
150 S. LOS ROBLES AVENUE, SUITE 200
PASADENA, CA 91101

ERIC KLINKNER
PASADENA DEPARTMENT OF WATER AND POWER
150 SOUTH LOS ROBLES AVENUE, SUITE 200
PASADENA, CA 91101-2437

STEVEN P. CHADIMA
ENERGY INNOVATIONS, INC.
130 WEST UNION STREET
PASADENA, CA 91103

STEVE ENDO
PASADENA DEPARTMENT OF WATER & POWER
150 S. LOS ROBLES AVE., STE. 200
PASADENA, CA 91105

JUSTIN RATHKE
CAPSTONE TURBINE CORPORATION
21211 NORDHOFF STREET
CHATSWORTH, CA 91311

TOM HAMILTON
SR. MANAGER
ICF INTERNATIONAL
14724 VENTURA BLVD. SUITE 1001
SHERMAN OAKS, CA 91403
FOR: ICF INTERNATIONAL

BRUNO JEIDER
BURBANK WATER & POWER
164 WEST MAGNOLIA BLVD.
BURBANK, CA 91502

MICHAEL TEN EYCK
UTILITY OPERATIONS MANAGER
CITY OF RANCHO CUCAMONGA
10500 CIVIC CENTER DRIVE
RANCHO CUCAMONGA, CA 91730

AKBAR JAZAYERI
SOUTHERN CALIFORNIA EDISON COMPANY
PO BOX 800
2244 WALNUT GROVE AVE.
ROSEMEAD, CA 91770
FOR: SOUTHERN CALIFORNIA EDISON

COMPANY

CASE ADMINISTRATION
SOUTHERN CALIFORNIA EDISON COMPANY
2244 WALNUT GROVE AVENUE, ROOM 370
ROSEMEAD, CA 91770

JIM LEHRER
SOUTHERN CALIFORNIA EDISON COMPANY
2244 WALNUT GROVE
ROSEMEAD, CA 91770

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DRAFT

November 6, 2008

FOR: SOUTHERN CALIFORNIA EDISON COMPANY
COMPANY

FOR: SOUTHERN CALIFORNIA EDISON

ROBERT F. LEMOINE
LAW DEPARTMENT
SOUTHERN CALIFORNIA EDISON COMPANY
2244 WALNUT GROVE AVENUE
ROSEMEAD, CA 91770

RONALD K. ISHII
AESC, INC.
5027 BALFOUR COURT, SUITE 213
CARLSBAD, CA 92008

DAN PERKINS
ENERGYSMARTHOMES.NET
983 PHILLIPS ST.
VISTA, CA 92083
FOR: CLEANTECH ENERGY SOLUTIONS INC.

FREDERICK M. ORTLIEB
OFFICE OF CITY ATTORNEY
CITY OF SAN DIEGO
1200 THIRD AVENUE, SUITE 1200
SAN DIEGO, CA 92101

ANNIE HENDERSON
CALIFORNIA CENTER FOR SUSTAINABLE ENERGY
8690 BALBOA AVE., STE. 100
SAN DIEGO, CA 92123

CENTRAL FILES
SAN DIEGO GAS & ELECTRIC
8315 CENTURY PARK COURT
SAN DIEGO, CA 92123

IRENE M. STILLINGS
EXECUTIVE DIRECTOR
CALIF. CNTR FOR SUSTAINABLE ENERGY
8690 BALBOA AVE., STE 100
SAN DIEGO, CA 92123

JENNIFER PORTER
POLICY AND OUTREACH MANAGER
CALIF. CNTR FOR SUSTAINABLE ENERGY
8690 BALBOA AVE., SUITE 100
SAN DIEGO, CA 92123

JOHN SUPP
PROGRAM MANAGER
CALIFORNIA CENTER FOR SUSTAINABLE ENERGY
ENERGY
8690 BALBOA AVENUE, SUITE 100
SAN DIEGO, CA 92123

JON BONK-VASKO
PROGRAM MANAGER
CALIFORNIA CENTER FOR SUSTAINABLE
ENERGY
8690 BALBOA AVE., SUITE 100
SAN DIEGO, CA 92123

JOY C. YAMAGATA
REGULATORY MANAGER
SAN DIEGO GAS & ELECTRIC COMPANY
ENERGY
8330 CENTURY PARK COURT, CP 32 D
SAN DIEGO, CA 92123

SEPHRA A. NINOW
POLICY ANALYST
CALIFORNIA CENTER FOR SUSTAINABLE
ENERGY
8690 BALBOA AVENUE, SUITE 100
SAN DIEGO, CA 92123

CAROL MANSON
REGULATORY AFFAIRS
SAN DIEGO GAS & ELECTRIC CO.
8330 CENTURY PARK COURT CP32D
SAN DIEGO, CA 92123-1530

EVELYN LEE
CITY OF SAN DIEGO
9601 RIDGEHAVEN COURT, SUITE 120
SAN DIEGO, CA 92123-1636

TOM BLAIR
ENERGY ADMINISTRATOR
DIV.)

BOB RAMIREZ
ITRON, INC. (CONSULTING & ANALYSIS

Resolution E-4205
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November 6, 2008

CITY OF SAN DIEGO
9601 RIDGEHAVEN COURT, SUITE 120
SAN DIEGO, CA 92123-1636

11236 EL CAMINO REAL
SAN DIEGO, CA 92130
FOR: ITRON, INC.

JEFFREY M. GARBER
GENERAL COUNSEL
IMPERIAL IRRIGATION DISTRICT
333 EAST BARIONI BOULEVARD
IMPERIAL, CA 92251

CHARLES R. TOCA
UTILITY SAVINGS & REFUND, LLC
PO BOX 54346
IRVINE, CA 92619-4346
FOR: UTILITY SAVINGS & REFUND, LLC

JEFF COX
DIRECTOR OR BUSINESS DEVELOPMENT
FUELCELL ENERGY
27068 LA PAZ ROAD, NO. 470
ALISO VIEJO, CA 92656

WILLIAM A. KARAMBELAS
VICE PRESIDENT, WESTERN REGION
FUELCELL ENERGY
27068 LA PAZ ROAD, NO. 470
ALISO VIEJO, CA 92656

HOWARD GREEN
DIR. UTILITY PROGAMS- WEST
SUN EDISON
1130 CALLE CORDILLERA
SAN CLEMENTE, CA 92673

SHARYN BARATA
VP MARKETING
OPINION DYNAMICS
28202 CABOT ROAD, STE. 300
LAGUNA NIGUEL, CA 92677
FOR: OPINION DYNAMICS

LES NELSON
WESTERN RENEWABLES GROUP
30012 AVENTURA, SUITE A
RANCHO SANTA MARGARITA, CA 92688

GEORGE DEHART
CITY OF ANAHEIM
200 SOUTH ANAHEIM BOULEVARD
ANAHEIM, CA 92805

STEVEN SCIORTINO
CITY OF ANAHEIM
200 SOUTH ANAHEIM BOULEVARD
ANAHEIM, CA 92805

SHAUN YEAGER
MOHR POWER SOLAR, INC
1454 POMONA ROAD
CORONA, CA 92882

LINDSEY TAGGART
COMMUNITY ENVIRONMENTAL OFFICE
29 W. ANAPAMU ST., 2ND FLOOR
SANTA BARBARA, CA 93101

MARK STOUT
DIR. OF RENEWABLE TECH. PLANNING
CLEANTECH AMERICA
1416 BROADWAY ST. SUITE B
FRESNO, CA 93721
FOR: CLEANTECH AMERICA

LES GULIASI
SUNFUND CORPORATION
PO BOX 3206
LOS ALTOS, CA 94024
FOR: SUNFUND CORPORATION

JOSH RICHMAN
DIRECTOR OF BUSINESS DEVELOPMENT
BLOOM ENERGY CORPORATION
1252 ORLEANS DRIVE
SUNNYVALE, CA 94089
FOR: BLOOM ENERGY CORPORATION

JASON HOUCK
DEPARTMENT OF ENVIRONMENT

JEANNE M. SOLE
DEPUTY CITY ATTORNEY

Resolution E-4205
SCE AL 2258-E and AL 2265-E/NLC

DRAFT

November 6, 2008

CITY AND COUNTY OF SAN FRANCISCO
11 GROVE STREET
RM. 234
SAN FRANCISCO, CA 94102

CITY AND COUNTY OF SAN FRANCISCO
1 DR. CARLTON B. GOODLETT PLACE,
SAN FRANCISCO, CA 94102

FRASER D. SMITH
CITY AND COUNTY OF SAN FRANCISCO
SAN FRANCISCO PUBLIC UTILITIES COMM
1155 MARKET STREET, 4TH FLOOR
SAN FRANCISCO, CA 94103
FOR: SAN FRANCISCO PUBLIC UTILITIES COMM

EVELYN KAHL
ATTORNEY AT LAW
ALCANTAR & KAHL, LLP
120 MONTGOMERY STREET, SUITE 2200
SAN FRANCISCO, CA 94104
FOR: ENERGY PRODUCERS AND USERS
COALITION

JACK WALKER
PENINSULA CAPITAL MGMT. INC.
235 PINE STREET, SUITE 1600
SAN FRANCISCO, CA 94104
FOR: PENINSULA CAPITAL MGMT. INC.

KAREN TERRANOVA
ALCANTAR & KAHL
120 MONTGOMERY ST., STE. 2200
SAN FRANCISCO, CA 94104

NICK ALLEN
MORGAN STANLEY RESEARCH
555 CALIFORNIA STREET STE 2200 21ST FLR
SAN FRANCISCO, CA 94104

NICK ZIGELBAUM
NATURAL RESOURCES DEFENSE COUNCIL
111 SUTTER STREET
SAN FRANCISCO, CA 94104
FOR: NATURAL RESOURCES DEFENSE

COUNCIL

SEAN HAZLETT
MORGAN STANLEY
555 CALIFORNIA ST., SUITE 2200, 21ST FL
SAN FRANCISCO, CA 94104

CAITLIN HENIG
PROGRAM MANAGER
PACIFIC GAS AND ELECTRIC COMPANY
245 MARKET ST. MAIL CODE N4G
SAN FRANCISCO, CA 94105

CECE BARROS
PACIFIC GAS AND ELECTRIC COMPANY
245 MARKET, ROOM 445
SAN FRANCISCO, CA 94105

EB RUSSELL
SUNTECH AMERICA INC
188 THE EMBARCADERO, 8TH FLR
SAN FRANCISCO, CA 94105

KRISTI PATTERSON
PACIFIC GAS AND ELECTRIC COOMPANY
245 MARKET, ROOM 430E
SAN FRANCISCO, CA 94105
1200

SHANNON GRAHAM
ASSOCIATE DIRECTOR
NAVIGANT CONSULTING, INC.
ONE MARKET, SPEAR STREET TOWER, STE
SAN FRANCISCO, CA 94105

SHERIDAN J. PAUKER
WILSON SONSINI GOODRICH & ROSATI
SPEAR TOWER, SUITE 3300
ONE MARKET ST
SAN FRANCISCO, CA 94105
FOR: VOTE SOLAR INITIATIVE

STACY W. WALTER
PACIFIC GAS AND ELECTRIC COMPANY
77 BEALE STREET, MC B30A
SAN FRANCISCO, CA 94105

PETER V. ALLEN
THELEN REID BROWN RAYSMAN & STEINER
101 SECOND STREET, SUITE 1800
SAN FRANCISCO, CA 94105-3606

COMPANY

CHESTER A. ROAMAN
1180 DE HARO
SAN FRANCISCO, CA 94107

STEVEN MOSS
SAN FRANCISCO COMMUNITY POWER COOPERATIVE
2325 THIRD STREET, STE 344
LAMPREY
SAN FRANCISCO, CA 94107

DEREK DENNISTON
DIRECTOR
EVOLUTION MARKETS INC
101 CALIFORNIA STREET, STE 2750
SAN FRANCISCO, CA 94111-5802

CASSANDRA MAYALL
PACIFIC GAS & ELECTRIC CO.
PO BOX 7433
SAN FRANCISCO, CA 94120-7433

SARA BIRMINGHAM
DIRECTOR, WESTERN POLICY
SOLAR ALLIANCE
646 19TH AVE
SAN FRANCISCO, CA 94121

CLINTON PORTER
KACO SOLAR INC.
1002 B. OREILLY AVE
SAN FRANCISCO, CA 94129
FOR: KACO SOLAR INC.

BHAT SUNCHETH
PACIFIC GAS AND ELECTRIC COMPANY
PO BOX 770000, MC B9A
SAN FRANCISCO, CA 94177

MICHAEL S. HINDUS
ATTORNEY AT LAW
PILLSBURY WINTHROP SHAW PITTMAN LLP
50 FREMONT STREET
SAN FRANCISCO, CA 94105-7880
FOR: CHEVRON ENERGY SOLUTIONS

ERIK STUEBE
ECOPLEXUS LLC
1733 20TH STREET
SAN FRANCISCO, CA 94107

BRIAN CRAGG
ATTORNEY AT LAW
GOODIN, MAC BRIDE, SQUERI, DAY &
505 SANSOME STREET, SUITE 900
SAN FRANCISCO, CA 94111

CHRIS RAPHAEL
EDITOR
CALIFORNIA ENERGY MARKETS
425 DIVISADERO ST.
SAN FRANCISCO, CA 94117
FOR: CALIFORNIA ENERGY MARKETS

BETSY WILKINS
WILKINS COMMUNICATIONS
815 25TH AVE., NO. 204
SAN FRANCISCO, CA 94121

RONNIE PETTERSSON
ENERGY RECOMMERCE, INC.
3717 BUCHANAN STREET, SUITE 333
SAN FRANCISCO, CA 94123

ANDREW YIP
PACIFIC GAS AND ELECTRIC COMPANY
PO BOX 770000, MC B27P
SAN FRANCISCO, CA 94177

CHARLES HORN BROOK
PO BOX 770000 MAIL CODE N4G
SAN FRANCISCO, CA 94177

JOSEPHINE WU
PACIFIC GAS AND ELECTRIC COMPANY
PO BOX 770000, MAIL CODE B9A
SAN FRANCISCO, CA 94177

GRANT KOLLING
SENIOR ASSISTANT CITY ATTORNEY
CITY OF PALO ALTO
250 HAMILTON AVENUE, 8TH FLOOR
PALO ALTO, CA 94301

JORDAN NEWMAN
TIOGA ENERGY
2755 CAMPUS DRIVE, SUITE 145
SAN MATEO, CA 94403

PAUL DETERING
TIOGA ENERGY
2755 CAMPUS DRIVE, SUITE 145
SAN MATEO, CA 94403

RENEE H. GUILD
DIRECTOR
SOLARCITY
393 VINTAGE PARK DR., SUITE 140
FOSTER CITY, CA 94404

JERRY JACKSON
838 CONSTITUTION DRIVE
FOSTER CITY, CA 94404-1802

JAY C. MCLAUGHLIN
FATHOM ENGINEERING
4843 SOUTH POINT
DISCOVERY BAY, CA 94505

JENNIFER CHAMBERLIN
MGR. OF REG. AND GOV. AFFAIRS
STRATEGIC ENERGY, LLC
2633 WELLINGTON CT.
CLYDE, CA 94520

SCOTT WAYLAND, P.E.
WYLAND ENGINEERING, INC.
424 MELROSE COURT
SAN RAMON, CA 94582
FOR: WYLAND ENGINEERING, INC.

SARAH BESERRA
CALIFORNIA REPORTS.COM
39 CASTLE HILL COURT
VALLEJO, CA 94591

KEVIN D. BEST
REAL ENERGY, LLC
6712 WASHINGTON STREET
YOUNTVILLE, CA 94599

JULIA LARKIN
KEMA
492 NINTH STREET, STE 220
OAKLAND, CA 94607
FOR: KEMA

NELLIE TONG
KEMA, INC.
492 NINTH STREET, SUITE 220
OAKLAND, CA 94607
FOR: KEMA, INC.

KARIN CORFEE
SENIOR CONSULTANT
KEMA INC.
492 NINTH STREET, SUITE 220
OAKLAND, CA 94607-4048
FOR: KEMA INC.

JERRY LAHR
PROGRAM MANAGER
ABAG POWER
101 EIGHT STREET
OAKLAND, CA 94607-4756

JODY LONDON
JODY LONDON CONSULTING
PO BOX 3629
OAKLAND, CA 94609

Resolution E-4205
SCE AL 2258-E and AL 2265-E/NLC

DRAFT

November 6, 2008

ZACH FRANKLIN
DEVELOPMENT DIRECTOR
GRID ALTERNATIVES
1610 HARRISON STREET, SUITE C
OAKLAND, CA 94612

MRW & ASSOCIATES, INC.
1814 FRANKLIN STREET, SUITE 720
OAKLAND, CA 94612

DOCKET COORDINATOR
5727 KEITH ST.
OAKLAND, CA 94618

GEOFF TEIGEN
RCM INTERNATIONAL, LLC
PO BOX 4716
BERKELEY, CA 94704

TARA MARCHANT
SUSTAINABLE DEV. PROJECT COORD.
THE GREENLINING INSTITUTE
1918 UNIVERSITY AVENUE
BERKELEY, CA 94704
FOR: THE GREENLINING INSTITUTE

JANICE LIN
STRATEGEN CONSULTING LLC
2855 TELEGRAPH AVENUE
BERKELEY, CA 94705

TOM BEACH
CROSSBORDER ENERGY
2560 NINTH STREET, SUITE 213A
BERKELEY, CA 94708

HEIDE KATE
SUN LIGHT & POWER
1035 FOLGER AVENUE
BERKELEY, CA 94710

EDWARD VINE
LAWRENCE BERKELEY NATIONAL LABORATORY
BUILDING 90R4000
BERKELEY, CA 94720

RYAN WISER
BERKELEY LAB
1 CYCLOTRON ROAD, MS-90-4000
BERKELEY, CA 94720

TAY FEDER
LAWRENCE BERKELEY NATIONAL LABORATORY
1 CYCLOTRON ROAD, MAILSTOP 90R4000
BERKELEY, CA 94720

JUSTIN WEIL
PRESIDENT
SUNWATER SOLAR INC.
865 MARINA BAY PARKWAY, SUITE 39
RICHMOND, CA 94804

JOHN NIMMONS
PRESIDENT
DEVELOPMENT
JOHN NIMMONS & ASSOCIATES, INC.
175 ELINOR AVE., SUITE G
MILL VALLEY, CA 94941

JOELENE MONESTIER
MANAGER, COMMERCIAL PROJECT

SPG SOLAR, INC.
20 LEVERONI COURT
NOVATO, CA 94949

MARY TUCKER
CITY OF SAN JOSE
OFFICE OF SUSTAINABILITY
200 EAST SANTA CLARA ST., 10TH FLOOR
SAN JOSE, CA 95113-1905

NANCY FOLLY
TURLOCK IRRIGATION DISTRICT
PO BOX 949
TURLOCK, CA 95381

WES MONIER

PRESTON BOOKER

SCE AL 2258-E and AL 2265-E/NLC

STRATEGIC ISSUES AND PLANNING MANAGER
TURLOCK IRRIGATION DISTRICT
333 EAST CANAL DRIVE, PO BOX 949
TURLOCK, CA 95381-0949
FOR: TURLOCK IRRIGATION DISTRICT

SONOMA ENERGY MANAGEMENT
643 WRIGHT STREET
SANTA ROSA, CA 95404

BARBARA R. BARKOVICH
BARKOVICH & YAP
44810 ROSEWOOD TERRACE
MENDOCINO, CA 95460

LIZ MERRY
VERVE SOLAR CONSULTING
2402 WESTERNESSE RD.
DAVIS, CA 95616

RICHARD MCCANN, PH.D
M. CUBED
CORPORATION
2655 PORTAGE BAY, SUITE 3
DAVIS, CA 95616

DENNIS DE CUIR
DENNIS W. DE CUIR, A LAW
2999 DOUGLAS BOULEVARD, SUITE 325
ROSEVILLE, CA 95661

ELIZABETH SHEPPARD
ENVIRONMENTAL SPECIALIST
SIERRA ECOSYSTEM ASSOCIATES
463 MAIN STREET, SUITE A
PLACERVILLE, CA 95667

KENNETH SWAIN
NAVIGANT CONSULTING, INC.
3100 ZINFANDEL DR., SUITE 600
RANCHO CORDOVA, CA 95670

KARLY MCCRORY
SOLAR DEVELOPMENT, INC.
5420 DOUGLAS BLVD. SUITE F
GRANITE BAY, CA 95746
FOR: SOLAR DEVELOPMENT, INC.

ANDREW B. BROWN
ATTORNEY AT LAW
ELLISON SCHNEIDER & HARRIS, LLP
2015 H STREET
SACRAMENTO, CA 95811

JEDEDIAH J. GIBSON
ATTORNEY AT LAW
ELLISON SCHNEIDER & HARRIS LLP
2015 H STREET
SACRAMENTO, CA 95811

GREGGORY L. WHEATLAND
ELLISON SCHNEIDER & HARRIS L.L.P.
2015 H STREET
SACRAMENTO, CA 95811-3109

AMBER RIESENHUBER
INDEPENDENT ENERGY PRODUCERS ASSOC.
1215 K STREET, SUITE 900
SACRAMENTO, CA 95814

DIANA CHONG
ENERGY ANALYST
CALIFORNIA ENERGY COMMISSION
1516 9TH STREET, MS-45
SACRAMENTO, CA 95814

HEATHER DOWLING
SOLAR SOLUTIONS SPECIALIST
SUNTECHNICS ENERGY SYSTEMS, INC.
660 J STREET, SUITE 270
SACRAMENTO, CA 95814

HOWARD E. SUSMAN
STOEL RIVES LLP
980 NINTH STREET, SUITE 1900
SACRAMENTO, CA 95814

JAN MCFARLAND
CAEATFA

JOHN A. MCKINSEY
STOEL RIVES LLP

Resolution E-4205
SCE AL 2258-E and AL 2265-E/NLC

DRAFT

November 6, 2008

915 CAPITOL MALL, RM. 457
SACRAMENTO, CA 95814

980 NINTH STREET, SUITE 1900
SACRAMENTO, CA 95814

KELLIE SMITH
SENATE ENERGY/UTILITIES & COMMUNICATION
PARTNERSHIP
STATE CAPITOL, ROOM 4038
SACRAMENTO, CA 95814

LAURENE PARK
THE PUBLIC SUSTAINABILITY
1215 K STREET, 17TH FLR
SACRAMENTO, CA 95814

LYNN WILEY
PROGRAM ANALYST
DEPT. OF COMMUNITY SERVICES & DEVELOP.
700 NORTH 10TH STREET, ROOM 258
SACRAMENTO, CA 95814

RYAN BERNARDO
BRAUN BLAISING MCLAUGHLIN, P.C.
915 L STREET, SUITE 1270
SACRAMENTO, CA 95814

JAYSON WIMBLEY
MGR. OF ENERGY AND ENVIRONMENTAL SVCS.
DEPT. OF COMMUNITY SERVICES & DEVELOP.
700 NORTH 10TH ST., ROOM 258
SACRAMENTO, CA 95814-0338

MARC DAVIS
BARNUM & CELILLO ELECTRIC, INC.
3900 TAYLOR STREET
SACRAMENTO, CA 95838

CHUCK SOLT
LINDH & ASSOCIATES
7909 WALERQA RD., STE 112, PMB 119
119
ANTELOPE, CA 95843

KAREN LINDH
CALIFORNIA ONSITE GENERATION
7909 WALERGA ROAD, NO. 112, PMB
ANTELOPE, CA 95843

JIM BARNETT
SACRAMENTO MUNICIPAL UTILITY DISTRICT
DISTRICT
PO BOX 15852, MS A203
SACRAMENTO, CA 95852-1803
FOR: SACRAMENTO MUNICIPAL UTILITY
DISTRICT

RACHEL HUANG
SACRAMENTO MUNICIPAL UTILITY
PO BOX 15852, MS A353
SACRAMENTO, CA 95852-1803
FOR: SACRAMENTO MUNICIPAL UTILITY
DISTRICT

STEPHEN FRANTZ
SACRAMENTO MUNICIPAL UTILITY DISTRICT
DISTRICT
PO BOX 15852. MS A353
SACRAMENTO, CA 95852-1803
FOR: SACRAMENTO MUNICIPAL UTILITY
DISTRICT

WADE HUGHES
SACRAMENTO MUNICIPAL UTILITY
PO BOX 15852, MS A203
SACRAMENTO, CA 95852-1803
FOR: SACRAMENTO MUNICIPAL UTILITY
DISTRICT

MICHAEL ALCANTAR
ATTORNEY AT LAW
ALCANTAR & KAHL LLP
1300 SW 5TH AVE., STE 1750
PORTLAND, OR 97201
FOR: COGENERATION ASSOCIATION OF
CALIFORNIA

ROD AOKI
ALCANTAR & KAHL LLP
1300 SW FIFTH AVENUE, SUITE 1750
PORTLAND, OR 97201
FOR: COGENERATION ASSOCIATION OF
CALIFORNIA

ERICK PETERSEN
VP OF SALES AND MARKETING
PV POWERED
150 SW SCALEHOUSE LOOP, NO. 101
BEND, OR 97702

TOM ECKHART
CAL-UCONS
10612 NE 46TH STREET
KIRKLAND, WA 98033
FOR: CAL-UCONS

MICHAEL KARP
A.W.I.S.H.
PO BOX 812
LOPEZ ISLAND, WA 98261

BRENDA LATTER
ITRON INC.
601 OFFICERS ROW
VANCOUVER, WA 98661
FOR: ITRON INC.

GEORGE SIMONS
PRINCIPAL RESEARCH CONSULTANT
ITRON
601 OFFICERS ROW
VANCOUVER, WA 98661
FOR: ITRON

KURT SCHEUERMANN
ITRON, INC.
601 OFFICERS ROW
VANCOUVER, WA 98661
FOR: ITRON, INC.

MATT SUMMERS
ITRON INC.
601 OFFICERS ROW
VANCOUVER, WA 98661
FOR: ITRON INC.

PATRICK LILLY
ITRON, INC.
601 OFFICERS ROW
VANCOUVER, WA 98661
FOR: ITRON, INC.

1.2 State Service

AMY REARDON
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
JUDGES
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

ANNE E. SIMON
CALIF PUBLIC UTILITIES COMMISSION
DIVISION OF ADMINISTRATIVE LAW

ROOM 5107
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

CURTIS SEYMOUR
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
JUDGES
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

DOROTHY DUDA
CALIF PUBLIC UTILITIES COMMISSION
DIVISION OF ADMINISTRATIVE LAW

ROOM 5109
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

ELIZABETH HELTON
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
AREA 4-A
505 VAN NESS AVENUE

JAY MORSE
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
AREA 4-A
505 VAN NESS AVENUE

Resolution E-4205
SCE AL 2258-E and AL 2265-E/NLC

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November 6, 2008

SAN FRANCISCO, CA 94102-3214

SAN FRANCISCO, CA 94102-3214

JEANNE CLINTON
CALIF PUBLIC UTILITIES COMMISSION
EXECUTIVE DIVISION
ROOM 4002
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

JOE COMO
CALIF PUBLIC UTILITIES COMMISSION
LEGAL DIVISION
ROOM 5033
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

JULIE A. FITCH
CALIF PUBLIC UTILITIES COMMISSION
POLICY & PLANNING DIVISION
ROOM 5119
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

KARIN M. HIETA
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

LISA PAULO
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
JUDGES
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214
FOR: ENERGY

MARYAM EBKE
CALIF PUBLIC UTILITIES COMMISSION
DIVISION OF ADMINISTRATIVE LAW
ROOM 5101
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

MELICIA CHARLES
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

MERIDETH STERKEL
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

MICHAEL COLVIN
CALIF PUBLIC UTILITIES COMMISSION
POLICY & PLANNING DIVISION
ROOM 5119
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

NICOLAS L. CHASET
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

ROBERT LEVIN
CALIF PUBLIC UTILITIES COMMISSION
ENERGY PRICING AND CUSTOMER PROGRAMS BRA
ROOM 4102
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

SACHU CONSTANTINE
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

THOMAS ROBERTS
CALIF PUBLIC UTILITIES COMMISSION
ENERGY PRICING AND CUSTOMER PROGRAMS BRA
ROOM 4104

DAVINA FLEMINGS
CALIF PUBLIC UTILITIES COMMISSION
EXECUTIVE DIVISION
770 L STREET, SUITE 1050

Resolution E-4205
SCE AL 2258-E and AL 2265-E/NLC

DRAFT

November 6, 2008

505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214
FOR: ENERGY

SACRAMENTO, CA 95814

DENNIS L. BECK JR.
SENIOR STAFF COUNSEL
CALIFORNIA ENERGY COMMISSION
1516 NINTH STREET, MS 14
SACRAMENTO, CA 95814

DEVORAH EDEN
CALIFORNIA ENERGY COMMISSION
1516 9TH STREET, MS 25
SACRAMENTO, CA 95814

DON SCHULTZ
CALIF PUBLIC UTILITIES COMMISSION
ENERGY PRICING AND CUSTOMER PROGRAMS BRA
770 L STREET, SUITE 1050
SACRAMENTO, CA 95814
FOR: DRA

ERIN E. GRIZARD
CALIF PUBLIC UTILITIES COMMISSION
EXECUTIVE DIVISION
770 L STREET, SUITE 1230
SACRAMENTO, CA 95814

LYNETTE ESTERNON-GREEN
CALIFORNIA ENERGY COMMISSION
1516 9TH STREET, MS-45
SACRAMENTO, CA 95814

MELISSA JONES
EXECUTIVE DIRECTOR
CALIFORNIA ENERGY COMMISSION
1516 9TH STREET, MS-39
SACRAMENTO, CA 95814

MICHAEL DOUGHTON
SENIOR STAFF COUNSEL
CALIFORNIA ENERGY COMMISSION
1516 9TH STREET MS-14
SACRAMENTO, CA 95814

SANDY MILLER
CALIFORNIA ENERGY COMMISSION
1516 9TH STREET MS NO.45
SACRAMENTO, CA 95814

SMITA GUPTA
CALIFORNIA ENERGY COMMISSION
1516 NINTH STREET, MS-25
SACRAMENTO, CA 95814

DAVID VIDAVER
CALIFORNIA ENERGY COMMISSION
1516 NINTH STREET, MS-20
SACRAMENTO, CA 95814-5512

ROD BAYBAYAN
CALIFORNIA ENERGY COMMISSION
1516 NINTH STREET
SACRAMENTO, CA 95814-5512

