State of California

M e m o r a n d u m

Date: June 9, 2022

To: Ryan Cho, Southern California Edison (SCE); Jay Bhatka, SCE; Danielle
          Dragon, Pacific Gas and Electric (PG&E); Anders Danyrd, Southern
          California Gas (SCG); Ed Reynoso, San Diego Gas and Electric (SDG&E);
          John Zwick, (SDG&E); Nancy Goddard, PacifiCorp; Andres Marquez, (SCG);
          Andres Fergadiotti, (SCE); Henry Liu, (PG&E); Kenny Liljestrom, (SDG&E)

CC:

From: Peter Biermayer P.E., Utilities Engineer, EE Planning & Forecasting
          Section, Energy Division, CPUC

Subject: Guidance memo establishing procedures for PA adoption of Statewide
          Measure Packages

1. Summary

The attached document outlines the procedures for Program Administrators (PAs) to adopt approved
statewide measure packages in those cases where PA did not submit implementation codes as part of the
initial approved measure package submission. This guidance revises previous guidance provided by CPUC
staff. Under these procedures, the adoption of approved statewide measure packages does not materially
change the measure offering values (unit energy savings, costs, measure application types, etc.) and does not
constitute a measure package revision.

This document will be available on https://cedars.sound-data.com/deer-resources/deemed-measure-
packages/guidance /.

Measure Package Adoption by PAs

A measure package will be submitted by the Lead PA within the eTRM. This measure package will represent one version of the measure.

Two conditions must be met for a measure version to be eligible for a specific PA portfolio:

1. <u>The measure package must be approved by CPUC staff to be eligible for IOU portfolios.</u>
   a. The Start Date and End Date of the approved measure version designate the period during which savings from the measure can be claimed.
   b. CPUC approval is necessary but not sufficient to indicate to third parties if the measure version has been adopted for use by a particular IOU.
   c. The process a Lead PA must follow to submit a measure version to the CPUC for review within the eTRM is documented in workflow guidelines and workflow diagram.
2. <u>Each PA must upload its PA Implementation Codes to eTRM for each approved measure version.</u>

The remainder of this section outlines the process by which <u>each</u> PA must upload its PA Implementation Codes for a CPUC-approved measure version.

Step 1: Update PA Codes within the PA Implementation Code section of the eTRM

Purpose: The PA Implementation Codes page of the eTRM allows PAs to document which permutations of a specific measure version are offered or not offered by each specific PA.
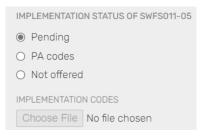
Responsibility: Updating PA Codes is the responsibility of <u>each PA for each measure version</u>. PA Codes are tied to a specific measure version; when a new draft is created to update the measure, the PA Codes will be removed and need to be re-uploaded by each PA.

PA Codes are required for measures active on 1/1/2022 or later since eTRM data will only be used for claims starting on 1/1/2022. PAs may choose to add PA Codes for other measure versions that were active prior to 2022, but this is not required.

Implementation Status Options:

"**Not offered**" – Select this implementation status if your PA is not planning to offer any permutations of the measure package. This information helps to communicate to 3Ps that the measure is intentionally excluded from the specific PA service territory.

"**PA codes**" – Select this implementation status so that Implementation IDs can be associated with Measure Detail IDs. This will enable the PA to choose to offer only the set of permutations that are desired. For example:

- A statewide program may include all offerings and all climate zones.

IMPLEMENTATION STATUS OF SWFS011-05

⦿ Pending
○ PA codes
○ Not offered

IMPLEMENTATION CODES

Choose File No file chosen

- An IOU specific program may include only the climate zones in that IOU service area.
- An electric-only IOU may include only electric offerings from a measure package.

Step 2: Create a Measure Log entry to document the PA Code update

Purpose: A Measure Log entry will permanently document the date that the PA codes were added/updated. The Measure Log entry creates a permanent record of when the original update was made.

Responsibility: Measure Log entries are entered automatically by the eTRM whenever PA Codes are uploaded for a measure version within the PA Implementation Codes section of the eTRM.

Standard conventions for this measure log entry are as follows:

1. Measure log entry type will be set to "PA Implementation Codes"
2. Standard text in the log entry message will be included:

> [*measure developer name*] added PA Implementation Codes for [*measure version ID*] for [specifies PA Association for measure developer that has uploaded PA Codes]

> Example:
> John Smith added PA Implementation Codes for SWLG011-03 for PG&E.

3. Visibility will be set to "Open"
4. Timestamp in the measure log entry will be included of the time that the codes were uploaded
5. The uploaded file is attached with the PA Implementation codes to the measure log entry

Note that a similar automated entry will not be added when the measure version is "Not offered".

Timing

All codes must be uploaded no later than: **April 30, 2022**

Background: To utilize eTRM Permutation Data for claims beginning 1/1/2022, IOUs need to align when this data is brought into their systems. The following steps are planned for this alignment to occur:

1. IOU systems cannot be updated until after Q4 2021 claims have been filed, which is March 2022.
2. IOU systems should be updated before Q1 2022 claims need to be filed, which is June 2022.
3. Depending upon the IOU, how and when this transition will occur may vary. Some IOUs can make a full transition right away, while others must use an interim system as they make more comprehensive changes to their internal systems.
   a. As of January 19, 2022, all IOUs have confirmed that the transition to the eTRM data can occur within this range for steps (1) and (2), March to June 2022 so that Q1 2022 claims can use eTRM permutation data.
4. A new API to download permutations with PA Implementation Codes is planned for v2.3 (being developed and implemented during the integration period). This API is integral to the PG&E solution to upload PA Codes into the eTRM. The release date for v2.3 is expected to be during the week of February 28th.

Reviewing steps (1) to (4) above, reveal the earliest that PA Implementation Codes can be uploaded is April 30, 2022.