**Workpaper Submission**

**Cover Sheet**

**Purpose:** The information in this coversheet will be used by the Deemed Review Team to identify incoming workpapers using consistent information applicable to track key information needed for the workpaper review.

**INSTRUCTION:** This cover sheet should be completed by Program Administrators upon submitting a workpaper. Additional instructions are provided below.

**Program Administrator (PA) Information**

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| --- | --- | --- | --- |
| **Parameter** | **Description** | **PA Entry** | |
| **PA** | Please check one. | SCE   PG&E | SCG  SDG&E |
| **PA Lead based on Use Category** | Please check one. | SCE  SCG  PG&E  SDG&E | |
| **Contact info** | Please provide the name and email address of submitter. | Eduardo Reynoso  ([ereynoso@sdge.com](mailto:ereynoso@sdge.com) ) | |

**Workpaper Information**

| **Parameter** | **Description** | **PA Entry** |
| --- | --- | --- |
| **Date of Workpaper Submission** | This entry should be date of upload to WPA (MM/DD/YYYY). Actual submission date will be noted as the subsequent first or third Monday of the month. | 12/31/2020 |
| **Workpaper Title** | This entry should match the title on the workpaper. | HVAC, SEER-Rated AC and HP Equipment, Residential |
| **Source Description** | This entry should match the source description for the workpaper.  (e.g., SWHC099-01) | SWHC049-01 |
| **Workpaper Phase** | Please provide the phase and year for the workpaper.  (e.g., 2020 P2 Workpaper Revision) | |  | | --- | | Effective Year: | | Phase 1  Phase 2  New workpaper  (new product or technology, new delivery type)  Workpaper revision  (new tiers, new costs, change in measure parameters such as EUL or NTG, measures added to workpaper)  Workpaper adoption (IOU adoption with new Implementations, no change to Measures, Cost and EE Impacts) |   Notes:  SDG&E submitting Implementations IDs in support of SW HVAC upstream program, the SDG&E Advise Letter 3648-E provides the timeline and specifics. The SDG&E 2021 ABAL does include a forecast for the upstream HVAC program which takes into account the other IOUs (PG&E, SCE, and SCG) forecasted estimate. |
| **Rationale for Workpaper Revision** | Please check all boxes that apply and include a brief description explaining why the workpaper is being revised. | Not a revision but a new WP  Code  DEER  Disposition  CPUC Resolution  Baseline Update  Cost Update  Industry Standard Practice Study  Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_.  WP Resubmission of Existing Revision (minor edits/corrections/new implementations)  Notes: No changes to workpaper measures, just and updated to EAD table for including SDG&E unique Implementation IDs in the EAD tables. |
| **Measure Impact Type**  **(DEER / CEDARS)** | Please check boxes that apply and include a brief description explaining measures types if using Custom. | Cust-FuelSub  Cust-Gen  Cust-NMEC  Cust-RCT  Cust-SEM  Deemed-DEER  Deemed-WP  Deemed-DEER-FuelSub  Deemed-WP-FuelSub  Notes: |
| **Effective Date** | Please provide the proposed earliest date of any claims to be made against this workpaper if it is approved. If this is a Phase 2 workpaper, please account for the submittal date as the first or third Monday of the month. Please add 90 days, where applicable.[[1]](#footnote-1) | Start Date: 7/10/2020  Notes:  The given start date aligns with the existing approved date listed on [www.deeresources.net](http://www.deeresources.net). |
| **Total expected statewide net lifetime savings from workpaper measures in the year indicated.** | This value is expressed in kWh and therms for electric and gas, respectively. | Year: 2021  Electric: 55,302 (kWh)  Gas: -208 (therms)  Check which PAs are included in this estimate of savings:  SCE  PG&E   SCG  SDG&E  Notes:  Estimate is based on 3PI CET estimate that may not be reflected in the 2021 ABAL. |
| **Change in net lifetime portfolio savings due to workpaper revision in the year indicated.** | This value is expressed in kWh or therms for electric and gas, respectively. Note a + indicates portfolio savings are expected to increase and a – indicates portfolio savings are expected to decrease. | Year: 2021  Gas: 0.0 +/– (therms)  Electric: 0.0 +/– (kWh)  Describe the sources of the change:  Not applicable, this submission is for adoption of statewide measures and not associated with a workpaper revision. |
| **Stakeholder Communications** | Describe which stakeholders were notified and what was the outcome of the correspondence. For some workpapers this may not be applicable. Please include additional sheets if necessary.  (E.g., Manufacturer for SCT submitted comments on workpaper, see attached) | 3P Implementer  Distributor(s)  Manufacture(s)  IOU Internal Stakeholders (Policy/Program Operations/Senior Leadership/Business Operation)  External Stakeholders (consultants, engineering SME, etc.)  Notes:  Given the sensitivity of ongoing contract negotiations it’s not possible to share details of ongoing 3PI communications per Contact Management Office (CMO). |
| **CalTF Development** | During development of this workpaper were there any specific flagged issues from CalTF pertaining to technical methodology or approach? | Yes  No  If Yes, then select issues types:  Savings model approach and or assumptions require updating (baseline, ISP, non-DEER building protypes, data files, extrapolation, weather data, etc.)  Measured savings calculations approach and or assumptions require updating (M&V plan, NMEC, Non-Routine Events (NRE), independent 3P validation)  Sample size may not representative of all climate zones, building types, HVAC, etc.  Issue with Savings Calculations (Interactive Effects, HOU, Code, Baseline, ISP, proprietary NDA, etc.)  Notes: |
| **Potential Market Impacts or Controversies** | Describe any responses to the stakeholder communications and any other sources of stakeholder or PA implementation concern with this workpaper revision regarding negative market impacts or controversies. | Yes  No  If Yes, then please check appropriate boxes:  3 Party Direct Install (DI) inventory  Existing contractual commitments  Lead time procurement issues  Market Disruption (ramp down/re-start)  Delivery channel changes (UpDeemed/DnDeemed/DnDeemDI)  PA Program ramp down (no longer cost effective)  Other (please detail)  Notes:  SDG&E is in the process of finalizing the 3PI SW HVAC contract and these measures have been identified by the 3PI for upstream delivery of the HVAC statewide program in PY2021. |
| **Associated Dispositions** | Is there a disposition associated with this workpaper?  If yes, please include the file name. (e.g., SWFS007-02\_HotHoldCab\_02\_19\_2020.pdf) | Yes  No  Notes: |
| **Additional Notes** |  | If additional information is needed regarding statewide HVAC upstream program, then please refer to SDG&E Advice Letter 3648-E which is downloadable from <https://www.sdge.com/rates-and-regulations/tariff-information/advice-letters> |

**Cover Sheet Revision History**

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| **Revision Number** | **Revision Date** | **Implementation Start Date** | **Author** | **Summary of Changes** |
| 0 | 3/15/2019 | 3/18/2019 | Kerri-Ann Richard, Deemed Review Team | Original Cover Sheet |
| 1 | 4/17/2019 | 4/22/2019 | Kerri-Ann Richard, Deemed Review Team | Addition of Consult with Stakeholders entry |
| 2 | 05/18/2020 | 05/18/2020 | Kerri-Ann Richard, Deemed Review Team | Updated All Entries |

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1. 90-day does not apply to new workpapers or new measures added to workpapers. [↑](#footnote-ref-1)