## W O R K P A P E R S U B M I S S I O N

**C O V E R S H E E T**

**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. | Andres Fergadiotti  Andres.Fergadiotti@sce.com | |

### Workpaper Information

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| **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. | 11/30/2020  (resubmission 3/31/2021) |
| **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) | SWHC049-02 |

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| **Parameter** | **Description** | **PA Entry** |
| **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: |
| **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:  Updated the costs using 2020 program data.  Added “Program Tracking Data and Evaluation Requirements” as required/recommended by E-5082. |

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| **Parameter** | **Description** | **PA Entry** |
| **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-DEER-WP   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 | Start Date: 1/1/2022  Notes: |
| **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: 2019  Electric: 250,000 kWh  Gas: 0 (therms)  Check which PAs are included in this  estimate of savings:  ☒ SCE ☐ PG&E  ☐ SCG ☐ SDG&E  Notes:  Potential measure savings projected based on workpaper savings, RASS, and ABAL documentation |

1 90-day does not apply to new workpapers or new measures added to workpapers.

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| **Parameter** | **Description** | **PA Entry** |
| **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: 2022  Gas: 0 (therms) Electric: 0 (kWh)  Describe the sources of the change: Only costs are revised, and tracking requirements are added. These revisions are not expected to impact the savings. |
| **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: Coordination and collaboration (including process and approach) on development of workpaper is documented in Workpaper Plan (including Utility programs, IOUs, CalTF and 3P consultant) |

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| **Parameter** | **Description** | **PA Entry** |
| **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: |

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| **Parameter** | **Description** | **PA Entry** |
| **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: |
| **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** |  |  |

### Cover Sheet Revision History

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| **Revision Number** | **Revision Date** | **Implementati on 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 |