Ex Ante PA Workpaper Submission Cover Sheet

Title: PA Workpaper Submission Cover Sheet

Purpose: The information in this coversheet will be used by the EAR Team to identify incoming workpapers using consistent information applicable to track the workpaper review schedule and level of rigor.

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

REVISION NUMBER: 1

REVISION DATE: 4/17/2019, to be used starting 4/22/2019

|  |  |  |
| --- | --- | --- |
| **Program Administrator (PA) Information** | | |
| **Parameter** | **Description** | **PA Entry** |
| PA | Please check one. For statewide workpapers submitted by either SCE for electric measures or SCG for gas measures, please also check SW. | SW  SCE  PG&E  SCG  SDG&E |
| Contact info | Please provide name and email address of submitter | Kelvin Valenzuela (SDG&E)  [kvalenzuela@semprautilities.com](mailto:kvalenzuela@semprautilities.com) |

| **Workpaper Information** | | |
| --- | --- | --- |
| **Parameter** | **Description** | **PA Entry** |
| Workpaper Title | This entry should match the title on the workpaper. | Refrigerant Charge, Commercial |
| Workpaper ID | This entry should match the workpaper ID on the workpaper. | SWSV002-01 |
| Revision Number | This entry should match the revision number on the workpaper. Whole numbers only. | 1 |
| Source Description | This entry should match the source description for the workpaper. | SWSV002-01 |
| Phase and Effective Year | Please provide the Phase and effective year for the workpaper. | |  |  | | --- | --- | | Year:2020 | Phase 1  Phase 2 |   Notes: New Statewide workpaper with start date of 1/1/2020 |
| 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 1st or 3rd Monday of the month. | |  |  | | --- | --- | | Start Date | 1/1/2020 |   Notes: This date aligns with DEER measures that the new statewide workpaper is based on for:   * NE-HVAC-RefChg-Inc-High-ntxv * NE-HVAC-RefChg-Inc-High-txv * NE-HVAC-RefChg-Inc-Typ-txv * NE-HVAC-RefChg-Inc-Typ-ntxv |
| Expiry Date | Please provide the proposed last date of any claims to be made against this workpaper if it is approved. If this is unknown, please provide additional notes. | |  |  | | --- | --- | | Expiry Date | TBD |   Notes: The new statewide workpaper measures are based on DEER Measures, and the given DEER measures have no expiry date. |
| % savings of total PA net lifetime portfolio as reported in the most recent ABAL | This value is expressed as a % for both electric and gas. | |  |  | | --- | --- | | PG&E  ABAL Year 2019 | Gas: 0%  Electric: 0% | | SCE  ABAL Year 2019 | Gas: %  Electric: % | | SCG  ABAL Year 2019 | Gas: %  Electric: % | | SDG&E  ABAL Year 2019 | Gas: %  Electric: 0.07% |   Notes: These are new statewide workpapers |
| % change to savings of total PA net lifetime portfolio due to workpaper revision | This value is expressed as a % for both electric and gas. | |  |  | | --- | --- | | ABAL Year: 2020 | Gas: % (TBD)  Electric: % (TBD) |   Notes: These are new statewide workpaper measures that will be included by each IOU during the 2020 ABAL. The given DEER measures have a start date of 1/1/2020. |
| Associated workpapers or from DEER | Is this an adopted or short form workpaper from another PA or from DEER?  If Yes, please identify which workpapers are associated, including workpaper revision number and PA this is adopted from | Yes  No  Notes:  A new statewide workpaper, the legacy SDG&E workpaper is  “WPSDGENRHC0022-Revision 02” and scheduled to sunset on 12/31/2019. The statewide workpaper measures do adopt and leverage the given DEER Measures:   * NE-HVAC-RefChg-Inc-High-ntxv * NE-HVAC-RefChg-Inc-High-txv * NE-HVAC-RefChg-Inc-Typ-txv * NE-HVAC-RefChg-Inc-Typ-ntxv |
| Associated dispositions | Is there a disposition associated with this workpaper?  If Yes, please include the file name (eg. SCE17WP001R1\_Pool Pump\_2019-01-28.pdf) | Yes  No  Notes: The CPUC ex-ante consultant issued a workpaper review on 7/17/2019 and later removed comment #2. The resubmittal only addresses #1, which is outline below:  The EAR Team has completed our review of the referenced workpaper and offers the following comments:   1. Several of the measures in the RCA workpaper (SWSV002-01) are inconsistent with Resolution E-4867 regarding the DEER2019 update. That resolution stipulates on page 64, “2. Savings for system circuits that are overcharged are minimal, so system circuits that are found to be overcharged during field work shall not be eligible for savings claims.” This affects measures SWSV002C and SWSV002D, which should be removed from the workpaper.   Please revise the attached and resubmit the **entire zip file to the WPA by Monday 7/22/2019.**  Please let me know if you have any questions.  Regards,  Kerri-Ann Richard, C.E.M.  *Senior Consultant*  **ERS** |
| Why is the WP being revised? | Please check all boxes that apply and include a brief description as to why the workpaper is being revised (Eg., Code or standard change, DEER resolution, Change to statewide workpaper, Designated high uncertainty measure by CPUC that required new studies, New impact evaluations that changed values, Other) | Code  DEER  Disposition  CPUC Resolution  Baseline Update  Other: conversion to SW workpaper and CPUC EAR team review  Cost Update  Industry Standard Practice Study |
| Consult with stakeholders | Utilities must demonstrate how they have consulted with stakeholders in their workpaper submissions, this could include vendors, third party implementers, manufacturers, CalTF, etc. | Notes:  California Technical Forum (Cal TF) has facilitated and assisted in socializing all statewide workpapers with the collaboration of each IOU/POU (PA) and third-party stakeholders statewide, by leveraging eTRM role out. |
| Additional notes: |  | Please refer to Cal TF power point slide deck file “CalTF - June 14th Statewide Measures.ppt”. |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Revision History** | | | | |
| **Revision Number** | **Revision Date** | **Implementation Start Date** | **Author** | **Summary of Changes** |
| 0 | 3/15/2019 | 3/18/2019 | Kerri-Ann Richard, EAR Team | Original Cover Sheet |
| 1 | 4/17/2019 | 4/22/2019 | Kerri-Ann Richard, EAR Team | Addition of Consult with Stakeholders entry |