State of California

MEMORANDUM

Date: March 7, 2022

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

CC: Paula Gruendling, CPUC; Jennifer Kalafut, CPUC; Simon Baker, CPUC

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

Subject: CPUC Guidance Joint IOU Vintage Proposal on Ex-Ante Building Vintage for Claims Processing

Introduction

This memo describes a consensus proposal from Southern California Edison Company (SCE), Pacific Gas and Electric Company (PG&E), San Diego Gas & Electric Company (SDG&E), and Southern California Gas Company (SCG) (together, the "Investor Owned Utilities" (IOUs)) regarding how to claim eTRM permuted building vintage for a given measure offering both near term and in the future.

Guidance

The IOUs reconvened with California Public Utilities Commission (CPUC) staff on August 15, 2022 to discuss and finalize the logic for claiming the building vintage permuted in eTRM for a given measure offering. To elaborate, the measure package savings permutations in eTRM only contain certain combinations of building vintages. Since savings claims will utilize the eTRM permutations starting program year 2022 and California Energy Data and Reporting System (CEDARS) specifications being updated to validate the Measure Detail ID in submitted savings claims, a potential disconnect between the "Eligible Building Type and Vintage" section in measure package characterization and the eTRM permutations could lead to errors in savings claims on CEDARS. Additionally, during the savings claims processing, IOUs must post

process customer application data to align with the eTRM permutations which meets the intention of the measure offering but may not align with the building vintage variable permuted for the same offering in eTRM.

This proposal formally accepts the adoption the following logic for claims processing beginning Program Year 2022 and 2023, only:

Field	Building Vintage determined at customer application stage*	Building Vintage combination within eTRM offering that should be claimed **
Building Vintage ***	Old	- Old - Ex (if Old is missing but applicable) - Any (where old and Ex were not permuted)
	Ex	- Ex - Any (where Ex was not permuted)
	Rec	- Ex - Any (where Ex was not permuted)
	New	- New - Any (only if the measure package characterization allows for new construction and measure offering was permuted with NC as Measure Application Type (MAT))

* Building Vintage determined at the customer application stage should be determined using the year built of the building where the project is being completed/proposed.
** Building Vintage is a variable in the eTRM permutation and a part of the MeasureDetailID.
*** In addition to the building vintage determined at the customer application stage, it is crucial to refer to measure package characterization to ensure the determined year built is allowed.