

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



April 29, 2014

**Advice Letter 4620**

Rasha Prince, Director  
Regulatory Affairs  
Southern California Gas  
555 W. Fifth Street, GT14D6  
Los Angeles, CA 90013-1011

**Subject: Establishment of Schedule No. G-AMOP, Residential Advanced Meter Opt-Out Program & Preliminary Statement Part VI - Memorandum Accounts, Advanced Meter Opt-Out Program Memorandum Account.**

Dear Ms. Prince:

Advice Letter 4620 is effective March 14, 2014.

Sincerely,

A handwritten signature in cursive script that reads "Edward F. Randolph".

Edward F. Randolph, Director  
Energy Division



**Rasha Prince**  
Director  
Regulatory Affairs

555 W. Fifth Street, GT14D6  
Los Angeles, CA 90013-1011  
Tel: 213.244.2009  
Fax: 213.244.3201  
*rprince@semprautilities.com*

March 14, 2014

Advice No. 4620  
(U 904 G)

Public Utilities Commission of the State of California

**Subject: Establishment of Schedule No. G-AMOP, Residential Advanced Meter Opt-Out Program and Preliminary Statement Part VI – Memorandum Accounts, Advanced Meter Opt-Out Program Memorandum Account (AMOPMA)**

Southern California Gas Company (SoCalGas) hereby submits for approval by the California Public Utilities Commission (Commission) a new schedule and two-way memorandum account as described below, applicable throughout its service territory as shown on Attachment B.

**Purpose**

In compliance with Decision (D.)14-02-019, this filing establishes 1) Schedule No. G-AMOP, Residential Advanced Meter Opt-Out Program, and 2) Preliminary Statement Part VI – Memorandum Accounts, Advanced Meter Opt-Out Program Memorandum Account (AMOPMA).

**Background**

D.14-02-019, issued February 27, 2014, granted SoCalGas' Application (A.) 12-05-016, filed May 11, 2012, requesting to establish the Advanced Meter Opt-Out Program (Program). The Program affords residential customers an option to not have an Advanced Meter installed at their premises. In addition, D.14-02-019 approves the interim fees for residential customers selecting the opt-out option proposed in A.12-15-016.<sup>1</sup> Moreover, D.14-02-019 also orders SoCalGas to establish a new two-way memorandum account to track revenues and costs associated with providing the Advanced Meter Opt-Out Program.

Specifically, Ordering Paragraph (OP) 2 of D.14-02-019 requires that:

Within 15 days of the effective date of this decision, Southern California Gas Company shall file a Tier 1 Advice Letter to implement an advanced meter opt-out option for its Advanced Metering Infrastructure Program (AMI) and to establish an Advanced Meter Opt-Out Tariff. The Advice Letter filing shall:

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<sup>1</sup> The interim fees will be subject to adjustment upon conclusion of the second phase of the consolidated proceedings, A.11-03-014, A.11-03-015, and A.11-07-020.

- a. Establish procedures for residential customers to select the opt-out option if they do not wish to have an advanced meter.
- b. Establish procedures to inform customers that the AMI Program has been modified to include an opt-out option for residential customers who do not wish to have an advanced meter at their location.
- c. Customers who do not wish to have an advanced meter at their location must exercise the opt-out option. However, any customer who prevents or fails to provide reasonable access to install an advanced meter will deem to have affirmatively exercised the opt-out option.
- d. Adopt the following interim fees and charges for residential customers selecting the opt-out option:

For Non-CARE Customers:

Initial Fee	\$75.00
Monthly Charge	\$10.00/month

For CARE Customers:

Initial Fee	\$10.00
Monthly Charge	\$5.00/month

- e. Establish a new two-way Memorandum Account to track revenues and costs associated with providing the opt-out option until a final decision on costs and cost allocation issues is issued.

D.14-02-019 further requires in OP 3 that as part of implementing the opt-out option that SoCalGas comply with the following guidelines:

1. Residential customers may begin signing up to participate in the opt-out option 20 days after the effective date of this decision. SoCalGas shall have a dedicated phone number for customers to call and sign up for the opt-out option. This number shall be staffed by customer service representatives trained to explain the opt-out option and fees.
2. Since a residential customer may opt-out for any reason, or no reason, SoCalGas may not require a customer to explain or state why he or she wishes to participate in the opt-out option as a condition for signing up.<sup>2</sup>
3. SoCalGas shall not charge customers the initial fee or the monthly charges until one of the following occurs: (1) for customers who do not yet have an advanced meter installed, the customer notifies SoCalGas that he/she does not want an advanced meter; or (2) for customers who already an advanced meter installed, the customer notifies SoCalGas that he/she no longer wants advanced meter services and SoCalGas removes the advanced meter.

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<sup>2</sup> However, SoCalGas may ask this question if a response is optional.

4. Customers may pay the initial fee to participate in the opt-out option over a three-month period.
5. SoCalGas may remove a customer from participating in the opt-out option if the customer fails to pay either the initial fee within three months of electing the opt-out option or the monthly charge.
6. A customer may only enroll in the opt-out option once per calendar year at the same residence.

### **Tariff Revisions**

#### **Schedule No. G-AMOP**

Pursuant to OP 2 of D.14-02-019, SoCalGas establishes Schedule No. G-AMOP to set forth the applicable charges and terms for SoCalGas' Advanced Meter Opt-Out Program.

#### **AMOPMA**

Pursuant to OP 2.e. of D.14-02-019, SoCalGas establishes the AMOPMA to track revenues and costs associated with providing the opt-out option until a final decision on costs and cost allocation issues is issued.

### **Opt-Out Procedures**

Attachment C to this Advice Letter provides the SoCalGas Opt-Out Procedures to be followed in implementing its Advanced Meter Opt-Out Program pursuant to OP 2a and 2b of D.14-02-019.

### **Protest**

Anyone may protest this Advice Letter to the Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. The protest must be made in writing and received within 20 days of the date of this Advice Letter, which is April 3, 2014. There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

CPUC - Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102

Copies of the protest should also be sent via e-mail to the attention of the Energy Division Tariff Unit ([EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)). A copy of the protest should also be sent via both e-mail and facsimile to the address shown below on the same date it is mailed or delivered to the Commission.

Attn: Sid Newsom  
Tariff Manager - GT14D6  
555 West Fifth Street  
Los Angeles, CA 90013-1011

Facsimile No. (213) 244-4957  
E-Mail: [snewsom@semprautilities.com](mailto:snewsom@semprautilities.com)

**Effective Date**

SoCalGas believes that this filing is subject to Energy Division disposition and, as ordered in D.14-02-019, is classified as Tier 1 (effective pending staff approval). SoCalGas respectfully requests that this advice letter be approved and made effective March 14, 2014, the date filed.

**Notice**

A copy of this advice letter is being sent to the parties listed on Attachment A, which includes the parties in A.08-09-023 and A.12-05-016.

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Rasha Prince  
Director  
Regulatory Affairs

Attachments

# CALIFORNIA PUBLIC UTILITIES COMMISSION

## ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No. **SOUTHERN CALIFORNIA GAS COMPANY (U 904G)**

Utility type:

ELC

GAS

PLC

HEAT

WATER

Contact Person: Sid Newsom

Phone #: (213) 244-2846

E-mail: SNewsom@semprautilities.com

### EXPLANATION OF UTILITY TYPE

ELC = Electric

GAS = Gas

PLC = Pipeline

HEAT = Heat

WATER = Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: 4620

Subject of AL: Establishment of Schedule No. G-AMOP, Residential Advanced Meter Opt-Out Program and PS Part VI – Memorandum Accounts, Advanced Meter Opt-Out Program Memorandum Account (AMOPMA)

Keywords (choose from CPUC listing): Metering, Memorandum Account

AL filing type:  Monthly  Quarterly  Annual  One-Time  Other

If AL filed in compliance with a Commission order, indicate relevant Decision/Resolution #:

D.14-02-019

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL No

Summarize differences between the AL and the prior withdrawn or rejected AL<sup>1</sup>: N/A

Does AL request confidential treatment? If so, provide explanation: No

Resolution Required?  Yes  No

Tier Designation:  1  2  3

Requested effective date: 3/14/14

No. of tariff sheets: 8

Estimated system annual revenue effect (%): \_\_\_\_\_

Estimated system average rate effect (%): \_\_\_\_\_

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: PS VI – Advanced Meter Opt-Out Memorandum Account, Schedule No. G-AMOP and TOCs

Service affected and changes proposed<sup>1</sup>: N/A

Pending advice letters that revise the same tariff sheets: None

**Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this filing, unless otherwise authorized by the Commission, and shall be sent to:**

**CPUC, Energy Division**

**Attention: Tariff Unit**

**505 Van Ness Ave.,**

**San Francisco, CA 94102**

[EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

**Southern California Gas Company**

**Attention: Sid Newsom**

**555 West 5<sup>th</sup> Street, GT14D6**

**Los Angeles, CA 90013-1011**

[SNewsom@semprautilities.com](mailto:SNewsom@semprautilities.com)

[tariffs@socalgas.com](mailto:tariffs@socalgas.com)

<sup>1</sup> Discuss in AL if more space is needed.

**ATTACHMENT A**

**Advice No. 4620**

**(See Attached Service Lists)**

ATTACHMENT B  
Advice No. 4620

Cal. P.U.C. Sheet No.	Title of Sheet	Cancelling Cal. P.U.C. Sheet No.
Revised 50166-G	PRELIMINARY STATEMENT - PART VI - MEMORANDUM ACCOUNTS, DESCRIPTION AND LISTING OF MEMORANDUM ACCOUNTS, Sheet 1	Revised 49758-G*
Original 50167-G	PRELIMINARY STATEMENT - PART VI - MEMORANDUM ACCOUNTS, ADVANCED METER OPT-OUT PROGRAM MEMORANDUM ACCOUNT (AMOPMA)	
Original 50168-G	Schedule No. G-AMOP, RESIDENTIAL ADVANCED METER OPT-OUT PROGRAM, Sheet 1	
Original 50169-G	Schedule No. G-AMOP, RESIDENTIAL ADVANCED METER OPT-OUT PROGRAM, Sheet 2	
Revised 50170-G	TABLE OF CONTENTS	Revised 50161-G
Revised 50171-G	TABLE OF CONTENTS	Revised 50162-G
Revised 50172-G	TABLE OF CONTENTS	Revised 49880-G
Revised 50173-G	TABLE OF CONTENTS	Revised 49881-G



PRELIMINARY STATEMENT - PART VI - MEMORANDUM ACCOUNTS  
DESCRIPTION AND LISTING OF MEMORANDUM ACCOUNTS

Sheet 1

A. GENERAL

Memorandum accounts are special accounts authorized by the Commission for the purpose of tracking certain costs and revenues. Please refer to each individual memorandum account description for the specific accounting treatment applicable to each account.

B. LISTING OF MEMORANDUM ACCOUNTS

- PCB Expense Account (PCBEA)
- Research Development and Demonstration Expense Account (RDDEA)
- Curtailement Violation Penalty Account (CVPA)
- Economic Practicality Shortfall Memorandum Account (EPSMA)
- Catastrophic Event Memorandum Account (CEMA)
- Vernon Avoided Distribution Cost Memorandum Account (VADCMA)
- Vernon Negotiated Core Contract Memorandum Account (VNCCMA)
- Research Royalty Memorandum Account (RRMA)
- Intervenor Award Memorandum Account (IAMA)
- Z Factor Account (ZFA)
- Self-Generation Program Memorandum Account (SGPMA)
- FERC Settlement Proceeds Memorandum Account (FSPMA)
- Gain/Loss On Sale Memorandum Account (GLOSMA)
- Affiliate Transfer Fee Account (ATFA)
- Firm Access and Storage Rights Memorandum Account (FASRMA)
- System Reliability Memorandum Account (SRMA)
- Fire Hazard Prevention Memorandum Account (FHPMA)
- California Solar Initiative Thermal Program Memorandum Account (CSITPMA)
- Honor Rancho Storage Memorandum Account (HRSMA)
- Wildfire Expense Memorandum Account (WEMA)
- Honor Rancho Cost Recovery Memorandum Account (HRCRMA)
- Natural Gas Appliance Testing Memorandum Account (NGATMA)
- Energy Savings Assistance Programs Memorandum Account (ESAPMA)
- General Rate Case Memorandum Account (GRCMA)
- Pipeline Safety and Reliability Memorandum Account (PSRMA)
- Aliso Canyon Memorandum Account (ACMA)
- Advanced Meter Opt-Out Program Memorandum Account (AMOPMA)

N

(TO BE INSERTED BY UTILITY)  
 ADVICE LETTER NO. 4620  
 DECISION NO. 14-02-019

ISSUED BY  
**Lee Schavrien**  
 Senior Vice President

(TO BE INSERTED BY CAL. PUC)  
 DATE FILED Mar 14, 2014  
 EFFECTIVE Mar 14, 2014  
 RESOLUTION NO. \_\_\_\_\_

PRELIMINARY STATEMENT - PART VI - MEMORANDUM ACCOUNTS  
ADVANCED METER OPT-OUT PROGRAM MEMORANDUM ACCOUNT (AMOPMA)

1. Purpose

The AMOPMA is recorded on SoCalGas' financial statements. The purpose of the AMOPMA is to record the incremental costs to implement the Utility's Advanced Meter Opt-Out Program (Program) and the associated revenues from the Program charges until the cost recovery provisions are addressed in Phase 2 of Application (A.) 11-03-014, et al., pursuant to Decision (D.) 14-02-019.

2. Applicability

This account shall apply to all gas customers except for those specifically excluded by the Commission.

3. Rates

See Disposition Section.

4. Accounting Procedures

SoCalGas shall maintain the AMOPMA by recording entries at the end of each month as follows:

- a) A debit entry equal to the incremental Operating and Maintenance (O&M) and Administrative and General (A&G) operating expenses associated with the Program;
- b) A debit entry equal to the incremental capital-related costs (i.e., depreciation, return and taxes) incurred for activities required to implement and run the Program;
- c) A credit entry equal to the initial charges, monthly charges, and any other charges determined collectable in Phase 2 of A.11-03-014, et al., for the Program;
- d) An entry equal to the amortization of the AMOPMA balance pending a final Commission decision on costs and cost allocation issues associated with the Program; and
- e) An entry equal to the interest on the average of the balance in the account during the month, calculated in the manner described in Preliminary Statement, Part I, J

5. Disposition

The AMOPMA balance will be addressed in Phase 2 of Application (A.) 11-03-014, et al., pursuant to D.14-02-019.

(TO BE INSERTED BY UTILITY)

ADVICE LETTER NO. 4620  
DECISION NO. 14-02-019

ISSUED BY

**Lee Schavrien**  
Senior Vice President

(TO BE INSERTED BY CAL. PUC)

DATE FILED Mar 14, 2014  
EFFECTIVE Mar 14, 2014

RESOLUTION NO. \_\_\_\_\_

Schedule No. G-AMOP  
RESIDENTIAL ADVANCED METER OPT-OUT PROGRAM

Sheet 1

APPLICABILITY

Applicable, in conjunction with any other applicable schedule, to all residential customers who do not wish to have a wireless, communicating meter, known as an Advanced Meter, installed at their premises (hereafter, "Opt-Out Customers"). Under this program, customers may receive service using an analog meter(s).

TERRITORY

Applicable throughout the service territory.

RATES

Customers who elect this option will be charged as follows:

Customers who take service on the California Alternate Rates for Energy (CARE) program will pay an initial fee and a monthly charge for analog meter service.

CARE Customers:  
Initial Fee: \$10.00  
Monthly Charge: \$5.00/month

Customers who are *not* taking service on the CARE program will pay an initial fee and a monthly charge for analog meter service.

Non-CARE Customers:  
Initial Fee: \$75.00  
Monthly Charge: \$10.00/month

Customers will not be charged the initial fee or monthly charge until such time as the customer elects the opt-out option by so notifying SoCalGas after receipt of such notification that: (1) an Advanced Meter is scheduled to be installed but prior to such installation; or (2) after installation, that the customer no longer wants Advanced Meter service, after which the Advanced Meter will be removed.

SPECIAL CONDITIONS

1. Metering Equipment. A non-communicating meter will be used to provide gas service for residential customers who elect this option.

(Continued)

(TO BE INSERTED BY UTILITY)  
ADVICE LETTER NO. 4620  
DECISION NO. 14-02-019

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**Lee Schavrien**  
Senior Vice President

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EFFECTIVE Mar 14, 2014  
RESOLUTION NO. \_\_\_\_\_

Schedule No. G-AMOP  
RESIDENTIAL ADVANCED METER OPT-OUT PROGRAM

Sheet 2

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N

(Continued)

SPECIAL CONDITIONS (Continued)

N

2. Billing. Customers will be billed for charges applicable under the customer's Otherwise Applicable Rate Schedule, plus the initial fee and the monthly charge described herein. Opt-Out Program customers will be charged the initial and monthly charges described above at such time as the customer elects the opt-out option by so notifying SoCalGas after receipt of such notification that: (1) an Advanced Meter is scheduled to be installed but prior to such installation; or (2) after installation, that the customer no longer wants advanced meter service, after which the Advanced Meter will be removed. The customer will be required to pay the initial fee over a three-month period. If the customer does not pay the fee within this period, the customer will be removed from participating in the opt-out option and returned to the Advanced Meter. All such charges will be subject to the terms and conditions for rendering and payment of bills under Rule No. 12.

Pursuant to Decision 14-02-019, a customer must elect to opt-out of the Advanced Meter Program, and shall default to Advanced Meter-based utility service absent such an election. If SoCalGas makes a field visit to a customer's residence for purposes of installing an Advanced Meter and the customer does not provide reasonable access to SoCalGas to install an Advanced Meter after being provided notice of eligibility for service under this Opt-Out Program and not electing to opt-out, the customer shall be deemed to have elected service under this Opt-Out Program.

A customer may request to participate in the Opt-Out Program at any time. However, a customer shall not be allowed to request to participate in the opt-out option at the same residence more than once during any twelve-month period.

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(TO BE INSERTED BY UTILITY)  
ADVICE LETTER NO. 4620  
DECISION NO. 14-02-019

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**Lee Schavrien**  
Senior Vice President

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(TO BE INSERTED BY UTILITY)  
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 DECISION NO. 14-02-019

ISSUED BY  
**Lee Schavrien**  
 Senior Vice President

(TO BE INSERTED BY CAL. PUC)  
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The following listed sheets contain all effective Schedules of Rates and Rules affecting service and information relating thereto in effect on the date indicated thereon.

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(Continued)

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(Continued)

(TO BE INSERTED BY UTILITY)  
 ADVICE LETTER NO. 4620  
 DECISION NO. 14-02-019

ISSUED BY  
**Lee Schavrien**  
 Senior Vice President

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PRELIMINARY STATEMENT (Continued)

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(TO BE INSERTED BY UTILITY)  
 ADVICE LETTER NO. 4620  
 DECISION NO. 14-02-019

ISSUED BY  
**Lee Schavrien**  
 Senior Vice President

(TO BE INSERTED BY CAL. PUC)  
 DATE FILED Mar 14, 2014  
 EFFECTIVE Mar 14, 2014  
 RESOLUTION NO. \_\_\_\_\_



**ATTACHMENT C**

**Advice No. 4620**

**Advanced Meter Opt-Out Procedures**

## **SOUTHERN CALIFORNIA GAS COMPANY ADVANCED METER OPT-OUT PROCEDURES**

### **Procedure for Residential Customers to Select the Opt-Out Option**

Southern California Gas Company (SoCalGas) has established the following method for residential customers to opt-out of the Advanced Meter Program if they do not wish to have a wireless advanced meter. A residential customer may opt-out for any reason, or no reason. SoCalGas may not require a customer to explain or state why he or she wishes to participate in the Opt-Out Program as a condition for signing up.

1. **Live Phone call with SoCalGas Representative.** SoCalGas has established a dedicated phone line (1-800-427-2200) available 24/7, staffed with Customer Service Representatives (CSRs) trained to explain the Advanced Meter Opt-Out Program and to enroll customers over the phone.

### **Procedure to Inform Residential Customers that the Opt-Out Option is Available**

SoCalGas will use the following methods to inform residential customers of the Advanced Meter Opt-Out Program:

1. **Website.** Information regarding the Advanced Meter Opt-Out Program will be available on SoCalGas' website at [www.socalgas.com](http://www.socalgas.com).

In addition, SoCalGas will update all its Advanced Meter customer communications to reflect the availability of the Advanced Meter Opt-Out Program to customers.

### **Procedure to Inform Advanced Meter Deferral List Customers of the Opt-Out Option**

SoCalGas will mail letters via the US Postal Service to all customers who, prior to March 19, 2014, formally requested a deferral of Advanced Meter installation and were subsequently added to the Deferral List.

This Deferral List includes customers who have (1) formally requested SoCalGas to add them to the installation Deferral List, or (2) contacted SoCalGas and requested removal of their existing Advanced Meter.

SoCalGas has established procedures to allow timely reports and information regarding the status of each letter as part of its due diligence in reaching these customers.

### **Procedure for Residential Customers that do not Provide Reasonable Access to Install an Advanced Meter**

Pursuant to Decision 14-02-019, if SoCalGas makes a field visit to a customer's residence for purposes of installing an Advanced Meter and the customer does not provide reasonable access to SoCalGas to install an Advanced Meter after being provided notice of eligibility for service under this Opt-Out Program and not electing to opt-out, the customer shall be deemed to have elected service under this Opt-Out Program.