

PUBLIC UTILITIES COMMISSION
505 Van Ness Avenue
San Francisco CA 94102-3298



Southern California Gas Company
GAS (Corp ID 904)
Status of Advice Letter 5766G
As of March 23, 2021

Subject: Revisions to SoCalGas' Rule No. 43, On-Bill Repayment, and Form No. 7200, Authorization to Add Charges to Utility Bill

Division Assigned: Energy

Date Filed: 02-19-2021

Date to Calendar: 02-24-2021

Authorizing Documents: D1506008

Disposition:	Accepted
Effective Date:	03-21-2021

Resolution Required: No

Resolution Number: None

Commission Meeting Date: None

CPUC Contact Information:

edtariffunit@cpuc.ca.gov

AL Certificate Contact Information:

Ray B. Ortiz

(213) 244-3837

ROrtiz@socalgas.com

PUBLIC UTILITIES COMMISSION
505 Van Ness Avenue
San Francisco CA 94102-3298



To: Energy Company Filing Advice Letter

From: Energy Division PAL Coordinator

Subject: Your Advice Letter Filing

The Energy Division of the California Public Utilities Commission has processed your recent Advice Letter (AL) filing and is returning an AL status certificate for your records.

The AL status certificate indicates:

- Advice Letter Number
- Name of Filer
- CPUC Corporate ID number of Filer
- Subject of Filing
- Date Filed
- Disposition of Filing (Accepted, Rejected, Withdrawn, etc.)
- Effective Date of Filing
- Other Miscellaneous Information (e.g., Resolution, if applicable, etc.)

The Energy Division has made no changes to your copy of the Advice Letter Filing; please review your Advice Letter Filing with the information contained in the AL status certificate, and update your Advice Letter and tariff records accordingly.

All inquiries to the California Public Utilities Commission on the status of your Advice Letter Filing will be answered by Energy Division staff based on the information contained in the Energy Division's PAL database from which the AL status certificate is generated. If you have any questions on this matter please contact the:

Energy Division's Tariff Unit by e-mail to
edtariffunit@cpuc.ca.gov



Joseph Mock
Director
Regulatory Affairs

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Los Angeles, CA 90013-1011
Tel: 213.244.3718
Fax: 213.244.4957
JMock@socalgas.com

February 19, 2021

Advice No. 5766
(U 904 G)

Public Utilities Commission of the State of California

Subject: Revisions to SoCalGas' Rule No. 43, On-Bill Repayment, and Form No. 7200, Authorization to Add Charges to Utility Bill

Southern California Gas Company (SoCalGas) hereby submits for approval by the California Public Utilities Commission (Commission or CPUC) revisions to its Rule No. 43, On-Bill Repayment (OBR), and Form No. 7200, Authorization to Add Charges to Utility Bill, applicable throughout its service territory, as shown on Attachment A.

Purpose

This submittal requests to modify Rule No. 43 and Form No. 7200, in consultation with the California Alternative Energy & Advanced Transportation Financing Authority (CAEATFA), the program administrator for the financing pilot programs, Energy Division, and other investor-owned utilities (IOUs),¹ with the purpose of updating various terms and definitions prior to the commencement of the OBR feature for the relevant financing programs and standardizing language used in Form No. 7200 across all of the IOUs.

Background

OBR allows customers to repay energy efficiency (EE) loans secured through private capital lenders directly on their energy bill. The original OBR Tariff was submitted prior to the launch of the programs, and CAEATFA has proposed program updates.

In D.13-09-044, the Commission approved two-year financing pilot programs for Residential, Affordable Multi-family, and Small Business customers utilizing private capital funds to encourage deeper EE retrofits. The Small Business and Affordable Multi-family programs allow for customers to repay loans using an OBR option. The decision approved \$75 million ratepayer funds as credit enhancements to incentive lenders for the purpose of providing

¹ Southern California Edison Company (SCE), Pacific Gas and Electric Company (PG&E), SoCalGas, and San Diego Gas & Electric Company (SDG&E) are collectively the IOUs.

better financing terms to customers pursuing EE upgrades. To administer these financing programs, the California Hub for Energy Efficiency (CHEEF) was created.

Energy Division and CAEATFA Recommended Tariff Revisions

SoCalGas' proposed tariff revisions include, but may not be limited to, the following:

Revisions to Rule No. 43 – On-Bill Repayment

- Remove “Pilot Program” from title and throughout the tariff.
- Replace references of “eligible loan and leases” with “eligible agreement” and “participating lender and lessor” with “Participating Financing Company” to account for other financing arrangements.
- Replace references of “Participating Financial Institutions (FI)” with “Participating Finance Company (or Companies).”
- Modify Section B by refining definitions, adding definitions for Bill and Customer, redefining Qualified Measures, and removing Affordable Multi-family Building, Eligible Lease, Eligible Loan, Loan Agreement, Loan Charge(s), Participating Lender, and Participating Lessor.
- Modify Section E by refining sub-sections and removing Affordable Multi-Family and Qualified Measures descriptions.
- Modify Section F by refining sub-sections.
- Modify Section F.5 by adding additional condition, “Unless otherwise instructed by CHEEF,” for SoCalGas to keep OBR Charges on the Bill.
- Modify Section F.6 to accurately reflect SoCalGas’ process for applying partial payment by adding the order in which the partial payment will be applied to components of the bill.
- Modify Section F.13 to accurately reflect the process if SoCalGas receives a payment from the customer that is in excess of the current charges.
- Modify Section G by refining sub-sections and Section G.3 by removing requirement to sign Form No. 7300 “Energy Efficiency Financing Pilot Programs Authorization of Revocation of Authorization to Release Customer Usage Information.”
- Refine Section H.
- Refine Section I and modify Section I.2 to clarify process to occur in the event a customer ceases to be SoCalGas’ customer of record and the subsequent customer at the same premises does not authorize OBR Charges to be placed on the Bill.
- Refine Section J.
- Refine Section K and modify Section K by moving last sentence regarding omissions or representations to appear in the first paragraph in this section.

Revisions to Form No. 7200 – Authorization to Add Charges to Utility Bill

- Replace all references of “eligible loan and leases” with “Eligible Agreement” to account for other financing arrangements.
- Replace all references to “Financial Institution” to “Participating Finance Company.”
- Add definitions for Customer, Eligible Agreement, Financing Charge(s), OBR Charges,

- OBR Rules, and Participating Finance Company and remove the definition of “You.”
- Refine language in Items 1, Authorization to Bill Loan Charges, and 2, Payment.
 - Clarify the process for applying partial payment by adding the process for PG&E, SCE, SDG&E, and SoCalGas in Item 3, Partial Payments.
 - Clarify the process that is to occur should SoCalGas receive a payment from a customer that is in excess of the current charges in Item 4, Overpayments.
 - Refine language in Item 5, Billing Inquiries and Disputes.
 - Clarify process to occur in the event a customer ceases to be SoCalGas’ customer of record and the subsequent customer at the same premises does not authorize OBR Charges to be placed on the Bill in item 6, Transfer of Payment Obligation.
 - Refine language in Item 7, Service Disconnection for Non-Payment of OBR Charges.
 - Remove Item 8, Jurisdiction, with the requirement to sign Form No. 7300 “Energy Efficiency Financing Pilot Programs Authorization of Revocation of Authorization to Release Customer Usage Information.”
 - Refine language in Item 9 (formerly Item 10), Utility not Liable for Improvements.
 - Add Item 10, “Liability in Connection with OBR Charges and Conduct by Participating Finance Companies, Contractors, and Service Providers” to mirror revisions made in Rule No. 43, Section K. Modify the ACCOUNT INFORMATION section by removing references to “Customer” as customer data fields now appear below the signature field.

See Attachment A for the revised tariffs.

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 March 11, 2021. 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

A copy of the protest should also be sent via e-mail to the attention of the Energy Division Tariff Unit (EDTariffUnit@cpuc.ca.gov). Due to the COVID-19 pandemic and the shelter at home orders, SoCalGas is currently unable to receive protests or comments to this Advice Letter via U.S. mail or fax. Please submit protests or comments to this Advice Letter via e-mail to the address shown below on the same date it is mailed or e-mailed to the Commission.

Attn: Ray B. Ortiz
Tariff Manager - GT14D6
555 West Fifth Street
Los Angeles, CA 90013-1011
Facsimile No.: (213) 244-4957
E-mail: ROrtiz@socalgas.com

Effective Date

SoCalGas believes this Advice Letter is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B. It is in compliance with Ordering Paragraph 6 of D.15-06-008. SoCalGas respectfully requests that this submittal be approved on March 21, 2021, which is 30 calendar days after the date submitted.

Notice

A copy of this Advice Letter is being sent to SoCalGas' GO 96-B service list and the Commission's service lists in A.12-07-003, et al., and R.13-11-005. Address change requests to the GO 96-B service list should be directed via e-mail to Tariffs@socalgas.com or call 213-244-2837. For changes to all other service lists, please contact the Commission's Process Office at 415-703-2021 or via e-mail at Process_Office@cpuc.ca.gov.

/s/ Joseph Mock
Joseph Mock
Director - Regulatory Affairs

Attachments



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.:

Utility type:

ELC GAS WATER
 PLC HEAT

Contact Person:

Phone #:
E-mail:
E-mail Disposition Notice to:

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas WATER = Water
PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #:

Tier Designation:

Subject of AL:

Keywords (choose from CPUC listing):

AL Type: Monthly Quarterly Annual One-Time Other:

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

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL:

Summarize differences between the AL and the prior withdrawn or rejected AL:

Confidential treatment requested? Yes No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? Yes No

Requested effective date:

No. of tariff sheets:

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:

Service affected and changes proposed¹:

Pending advice letters that revise the same tariff sheets:

¹Discuss in AL if more space is needed.

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

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

Name:
Title:
Utility Name:
Address:
City:
State: Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

Name:
Title:
Utility Name:
Address:
City:
State: Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

ATTACHMENT A
Advice No. 5766

Cal. P.U.C. Sheet No.	Title of Sheet	Cancelling Cal. P.U.C. Sheet No.
Revised 58555-G	Rule No. 43, ON-BILL REPAYMENT, Sheet 1	Revised 51825-G
Revised 58556-G	Rule No. 43, ON-BILL REPAYMENT, Sheet 2	Original 50796-G
Revised 58557-G	Rule No. 43, ON-BILL REPAYMENT, Sheet 3	Original 50797-G
Revised 58558-G	Rule No. 43, ON-BILL REPAYMENT, Sheet 4	Revised 51826-G
Revised 58559-G	Rule No. 43, ON-BILL REPAYMENT, Sheet 5	Revised 51827-G
Revised 58560-G	Rule No. 43, ON-BILL REPAYMENT, Sheet 6	Revised 51828-G
Revised 58561-G	Rule No. 43, ON-BILL REPAYMENT, Sheet 7	Revised 51829-G
Revised 58562-G	Rule No. 43, ON-BILL REPAYMENT, Sheet 8	Revised 51830-G
Revised 58563-G	SAMPLE FORMS - CONTRACTS, AUTHORIZATION TO ADD CHARGES TO UTILITY BILL, Form 7200 (03/2021)	Revised 51831-G
Revised 58564-G	TABLE OF CONTENTS	Revised 58357-G
Revised 58565-G	TABLE OF CONTENTS	Revised 57726-G
Revised 58566-G	TABLE OF CONTENTS	Revised 58554-G

Rule No. 43
ON-BILL REPAYMENT

Sheet 1

A. APPLICABILITY

This Rule is applicable to natural gas service to non-residential End-Use Customers, and to residential multi-family End-Use Customers, who meet the criteria specified in Section E (CUSTOMER ELIGIBILITY), below, and receive service under SoCalGas Utility gas rate schedule.

On-Bill Repayment (OBR) is designed to facilitate billing for an Eligible Agreement on the Customer's Bill to finance Qualified Measures and their installation at the Customer's Premises.

OBR is available for Eligible Agreements funded by Participating Finance Companies as directed by the California Public Utilities Commission (CPUC).

B. DEFINITIONS

The definitions of capitalized terms used in this Rule are defined below. If a capitalized term used in this Rule is not defined below, it is defined in Rule No. 01, Definitions.

Bill: The Customer's utility bill.

California Hub for Energy Efficiency Financing (CHEEF): A central enabling entity through which energy users, finance and/or service companies, energy efficiency providers, and Participating Utilities can participate in a program to help finance the installation of Qualified Measures. The CHEEF may act through agents or third-party service providers.

Customer: The individual or entity that takes service from SoCalGas.

Eligible Agreement: An agreement between the Customer and Participating Finance Company that satisfies the requirement for participation in OBR pursuant to OBR Rules.

Financing Charge(s): Amounts due to a Participating Finance Company during a repayment period for an Eligible Agreement, including any late fees, late payments, or any other fees as calculated by the Participating Finance Company pursuant to the Eligible Agreement.

On-Bill Repayment: A process whereby OBR Charges are billed through the Customer's Bill, and collected OBR Charges are forwarded to the Participating Finance Company.

OBR Charge(s): Finance Charge relating to an Eligible Agreement for the financing of Qualified Measures and their installation at the premises associated with the Customer's account and included on a Bill pursuant to the Eligible Agreement and OBR Rules.

(Continued)

(TO BE INSERTED BY UTILITY)
 ADVICE LETTER NO. 5766
 DECISION NO. D.15-06-008

ISSUED BY
Dan Skopec
 Vice President
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
 SUBMITTED Feb 19, 2021
 EFFECTIVE Mar 21, 2021
 RESOLUTION NO. _____

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Rule No. 43
ON-BILL REPAYMENT

Sheet 2

(Continued)

B. DEFINITIONS (Continued)

OBR Rules: Rules and requirements for participation in OBR established by the CHEEF in Title 4, Division 13, Articles 6 and 7 of the California Code of Regulations.

Participating Finance Company: A finance or service company approved for participation in OBR by the CHEEF, pursuant to OBR Rules.

Participating Utility: Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and/or Southern California Gas Company (SoCalGas).

Qualified Measures: Measures approved as eligible for inclusion in OBR pursuant to OBR Rules.

Utility Charge(s): Charge(s) rendered by SoCalGas for gas service, deposits, and related charges approved by the CPUC. OBR Charges are not Utility Charges.

C. TERRITORY

OBR is available throughout SoCalGas's service area, subject to the availability of Participating Finance Companies.

D. RATES

All charges and provisions of the Customer's otherwise applicable rate schedule shall continue to apply. Each OBR Charge will appear as a separate line item (or multiple line items) on the Bill, as determined by the CPUC in coordination with the CHEEF.

E. CUSTOMER ELIGIBILITY

1. A Customer, or its authorized agent or representative must authorize SoCalGas to include the OBR Charge on the Bill. The Customer must be current on their Utility Charges at the time the OBR Charge is first added to the Bill (i.e., not in default, arrears or an active payment arrangement).

2. A Customer must meet the eligibility requirements described in the OBR Rules.

(Continued)

(TO BE INSERTED BY UTILITY)
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ISSUED BY
Dan Skopec
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Rule No. 43
ON-BILL REPAYMENT

Sheet 3

(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES

1. SoCalGas is authorized to include OBR Charges on the Bill until otherwise instructed by the CHEEF or as provided herein. Upon the Customer's, or its authorized agent or representative's authorization, SoCalGas will include the OBR Charges as a line item or items on the Customer's Bill as calculated and transmitted by the Participating Finance Company and communicated to SoCalGas by the CHEEF. SoCalGas may rely on instructions received from the CHEEF and its agents and is not required to verify the amount of the OBR Charges or undertake any other verification or inquiry with respect to the transactions giving rise to the OBR Charges. OBR Charges may increase or decrease from month to month based on the terms of the Eligible Agreement.
2. SoCalGas will include or remove OBR Charges on the Bill only pursuant to instructions from the CHEEF or as otherwise required by law. The CHEEF may instruct SoCalGas to remove OBR Charges from the Bill pursuant to OBR rules. If SoCalGas receives instructions from the CHEEF, or a court of competent jurisdiction, to remove OBR Charges, SoCalGas will remove such charges from the Bill no later than the second billing cycle after such instructions are received. All collection and enforcement action with respect to an Eligible Agreement shall be and will remain the responsibility of the Participating Finance Company.
3. In the event a Customer uses an Eligible Agreement to finance the installation of Qualified Measures consisting of both gas and electric measures, and is a customer of more than one Participating Utility, then the OBR Charges attributable to such Eligible Agreement will be placed on the Bill of the Participating Utility for which the greatest Qualified Measure installed costs are expected to accrue, as determined by the CHEEF.
4. A Customer shall pay OBR Charges along with all other charges on the Bill in accordance with the payment terms applicable to the Bill. All payments shall be made to SoCalGas. SoCalGas will forward the OBR Charge payments received to the CHEEF.
5. Unless otherwise instructed by CHEEF, SoCalGas shall keep OBR Charges on the Bill unless it is determined that the Customer's account with SoCalGas for all service at the site will be closed. On or after such account closure, SoCalGas will have no further responsibility for collecting and remitting OBR Charges unless the responsibility to pay such OBR Charges is assumed by its subsequent customer at the Premises, pursuant to Section I. (TRANSFERABILITY OF OBLIGATION TO PAY OBR CHARGES), below.

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(TO BE INSERTED BY UTILITY)
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 DECISION NO. D.15-06-008

ISSUED BY
Dan Skopec
 Vice President
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
 SUBMITTED Feb 19, 2021
 EFFECTIVE Mar 21, 2021
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Rule No. 43
ON-BILL REPAYMENT

Sheet 4

(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES (Continued)

6. Partial Payment: SoCalGas billing system applies partial payment to the components of the Bill in accordance with existing tariff rules. Because non-payment of non-residential OBR Charges subjects a Customer's account with SoCalGas to service disconnection, payments will be applied to past due OBR Charges prior to any current charges. A Customer's failure to pay any of the components of the Bill (other than for residential properties) will subject the Customer to service termination as set forth in Rule No. 09, Discontinuance of Service. Residential service is not subject to disconnection.

If a Customer makes only partial payment on a Bill, the partial payment will be applied to the following components of the Bill according to the order listed below:

- A. Utility Charges, which include utility service and credit establishment charges.
- B. Energy-related charges, which include charges based on energy consumption and tariff schedules.
- C. Other applicable products and services charges, which include all other services billed by SoCalGas such as OBR Charges.

7. Termination of Utility Service for Non-Payment of OBR Charges: Unless otherwise prohibited by law, non-payment of OBR Charges by a Customer, other than for residential properties, shall subject the Customer to utility service disconnection, consistent with the provisions of Rule No. 09, Discontinuance of Service, on the same terms and conditions under which SoCalGas will disconnect the Customer for failure to pay Utility Charges. SoCalGas will reconnect service for a CPUC-authorized service fee when the criteria for reconnection, as specified in Rule No. 10, Service Charges, have been met and delinquent OBR Charges and Utility Charges have been paid. In order to be reconnected, the Customer must pay delinquent OBR Charges but is not required to pay any accelerated balance of the Eligible Agreement. Upon remedy of delinquent OBR Charges, a Customer that has been terminated will also be required to meet the criteria of Rule No. 06, Establishment and Re-Establishment of Credit.

8. Utility Provision of Data on Collection Events: SoCalGas shall provide the CHEEF at the request of the CPUC, and in consultation with the CHEEF, accurate and timely data on Customers-specific collection events that SoCalGas initiates in keeping with Rule No. 09 and procedures cited above.

9. Past-Due and Liability for Disconnection Notice: SoCalGas shall issue notice to non-residential Customers with past due OBR Charges reminding them of the liability of disconnection and a possible timeline for disconnection. Such notice shall use the existing processes and protocols SoCalGas has in place for past-due notification.

(Continued)

(TO BE INSERTED BY UTILITY)
 ADVICE LETTER NO. 5766
 DECISION NO. D.15-06-008

ISSUED BY
Dan Skopec
 Vice President
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
 SUBMITTED Feb 19, 2021
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Rule No. 43
ON-BILL REPAYMENT

Sheet 5

(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES (Continued)

- 10. Declaration of Event of Default Under Eligible Agreement: If the Participating Finance Company elects to declare an event of default under the terms of the Eligible Agreement, it may demand immediate repayment of the entire principal and interest amounts outstanding (acceleration of Eligible Agreement repayment). If the Finance Company chooses to accelerate the Eligible Agreement repayment, the Finance Company must instruct the CHEEF to request that SoCalGas remove all related OBR Charges from the Bill. No accelerated repayments shall be eligible to be serviced as an OBR Charge. The Participating Finance Company shall be fully responsible for collecting all further amounts due under the Eligible Agreement from the Customer. D
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- 11. Customer Bankruptcy: If a Customer enters into bankruptcy protection under the United States Bankruptcy Code, SoCalGas, upon notice, shall remove all OBR Charges from the Bill. If service was disconnected due to non-payment of Utility Charges or OBR Charges, service shall be reconnected if required to comply with Bankruptcy Law provided the Customer complies with Rule No. 10. Once OBR Charges have been removed from the Bill due to the Customer's bankruptcy, Financing Charges shall only be placed back on the Bill pursuant to OBR Rules. L
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- 12. Security Deposit: If a Customer has or is required to provide a security deposit to establish or re-establish credit with SoCalGas in order to connect or reconnect service, the OBR Charges will not be included in the calculation of the security deposit pursuant to Rule No. 07, Deposits. The security deposit and interest earned on the deposit, if any, will not apply to delinquent or current OBR Charges and the Participating Finance Company will have no claim on or interest in the security deposit and interest earned on the deposit, if any. L,T
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- 13. Prepayment of OBR Charges: SoCalGas is not responsible for collecting, receiving or remitting any amounts attributable to prepayment of an Eligible Agreement. If, in accordance with the Eligible Agreement, the Customer elects to pay some or all of the outstanding Eligible Agreement balance independent of the OBR Charges, the Customer must send such payment directly to the Participating Finance Company, rather than to SoCalGas. If SoCalGas receives payment from the Customer in excess of their current charges, such excess payment will first be applied to the Customer's overdue charges, if any, and will then be applied to future charges on the Customer's account. If the Customer desires to be returned to them any excess amounts remaining on their account after all overdue charges are paid, Customer must notify SoCalGas and SoCalGas will then refund such funds. L,D,N
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(TO BE INSERTED BY UTILITY)
 ADVICE LETTER NO. 5766
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ISSUED BY
Dan Skopec
 Vice President
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
 SUBMITTED Feb 19, 2021
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Rule No. 43
ON-BILL REPAYMENT

Sheet 6

(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES (Continued)

14. Bill Impacts: OBR Charges may increase the amount of the Bill. OBR Charges may or may not be offset in whole or in part by a reduction in a Customer's energy usage resulting from the installation of Qualified Measures and the Customer shall not be entitled to claim any reduction in OBR Charges based on the extent to which Qualified Measures achieve their anticipated benefits. OBR Charges must be paid by the Customer whether or not the Qualified Measures result in a reduction in the Customer's energy usage or savings on the Bill. SoCalGas disclaims any warranty including warranty of merchantability or fitness for a particular purpose regarding any Qualified Measures.

15. Eligible Agreement Disclosures: Nothing in this Rule shall relieve Participating Finance Companies from any legal obligation to make disclosures or to provide periodic statements or other information to its customers with respect to Eligible Agreements. SoCalGas assumes no responsibility with respect to such disclosures and reporting by virtue of providing OBR services pursuant to this Rule.

16. Payment Arrangements: SoCalGas may extend payment arrangements for Utility Charges as defined by Rule No. 09 to a customer with OBR Charges on its Bill. Any payment arrangements for OBR charges will be according to agreements between the Participating Finance Company and its Customer, and will not include involvement by SoCalGas.

G. REQUIRED AGREEMENTS

1. Eligible Agreement: A Customer participating in OBR must be named on an Eligible Agreement with a Participating Finance Company which specifies the repayment obligations in accordance with the OBR Rules and any other associated agreements required by the Participating Finance Company.

2. Authorization Form: A Customer participating in OBR, or its authorized agent or representative, must execute an "*Authorization to Add Charges to Utility Bill*" (Form No. 7200) with SoCalGas that specifies the terms and conditions under which SoCalGas will include the OBR Charges, along with confirmation of SoCalGas disconnect provisions.

(Continued)

(TO BE INSERTED BY UTILITY)
 ADVICE LETTER NO. 5766
 DECISION NO. D.15-06-008

ISSUED BY
Dan Skopec
 Vice President
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
 SUBMITTED Feb 19, 2021
 EFFECTIVE Mar 21, 2021
 RESOLUTION NO. _____

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Rule No. 43
ON-BILL REPAYMENT

Sheet 7

(Continued)

H. OTHER FORMS

1. To receive bill payment history directly from SoCalGas, a Customer or its authorized agent or representative, must sign Form No. 8206 “*Authorization to Receive Customer Information or Act Upon a Customer’s Behalf*” to provide the CHEEF and a Participating Finance Company authorization to access the Customer’s billing information and any other relevant Customer-specific data.

I. TRANSFERABILITY OF OBLIGATION TO PAY OBR CHARGES

1. Responsibility to pay OBR Charges may be voluntarily assumed by SoCalGas’s subsequent customer at the same Premises. In order to assume OBR Charges, the subsequent customer at the same Premises must consent to assume the obligation to pay the balance due on the Eligible Agreement in writing as deemed appropriate by the Participating Finance Company and must fully execute an “*Authorization to Add Charges to Utility Bill*” (Form No. 7200) whereby the subsequent customer, or its authorized agent or representative, authorizes OBR Charges to be placed on the Bill. SoCalGas will include OBR Charges on the Bill of the subsequent customer only pursuant to instructions received from the CHEEF.
2. In the event a Customer ceases to be SoCalGas’s customer at the Premises where the Qualified Measures from the Eligible Agreement are installed and the subsequent customer at the same Premise does not authorize OBR Charges to be placed on the Bill, OBR Charges will no longer appear on the Bill for that Premise and SoCalGas will have no further obligation to collect OBR Charges on that Bill.

J. BILLING INQUIRIES OR DISPUTES

1. A Customer’s inquiries concerning Utility Charges should be directed to SoCalGas.
2. A Customer’s inquiries concerning OBR Charges should be directed to the Participating Finance Company.
3. Where a Customer disputes its obligations to pay OBR Charge(s), the dispute shall be resolved between the Customer and the Participating Finance Company and SoCalGas shall not be a party to the dispute. SoCalGas will continue to include OBR Charges on the Bill pending dispute resolution unless otherwise instructed by the CHEEF or a court of competent jurisdiction as set forth in Section F (BILLING AND PAYMENT OF OBR CHARGES), paragraph 2, above. Where a Customer disputes its obligation to pay Utility charges, and impounds any disputed amount with the Commission in accordance with Rule No. 11, Disputed Bills, the Customer’s payments will be allocated in accordance with SoCalGas’s existing rules, tariffs, and procedures.

(Continued)

(TO BE INSERTED BY UTILITY)
 ADVICE LETTER NO. 5766
 DECISION NO. D.15-06-008

ISSUED BY
Dan Skopec
 Vice President
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
 SUBMITTED Feb 19, 2021
 EFFECTIVE Mar 21, 2021
 RESOLUTION NO. _____

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Rule No. 43
ON-BILL REPAYMENT

Sheet 8

(Continued)

J. BILLING INQUIRIES OR DISPUTES (Continued)

4. If a Customer subsequently contacts the CHEEF regarding SoCalGas's billing service, rather than a dispute with the Participating Finance Company, the Customer will be referred to the CPUC's Consumer Affairs Branch (CAB) for assistance through its dispute resolution process. Disputes with the Participating Finance Company regarding any terms of the Eligible Agreement must be resolved directly with the Participating Finance Company and cannot be resolved by the CAB.

K. LIABILITY IN CONNECTION WITH OBR CHARGES AND CONDUCT BY PARTICIPATING FINANCE COMPANIES, CONTRACTORS, AND SERVICE PROVIDERS

SoCalGas shall not be liable to a Customer for any damages caused by or resulting from any acts, omissions or representations (i) made by a Participating Financing Company or a contractor or service provider in connection with soliciting customers for Qualified Measures or for an Eligible Agreement or (ii) a Participating Finance Company's failure to perform any commitment to the Customer or misrepresentation to the Customer. The amount of the OBR Charges shall be provided to SoCalGas by the CHEEF. SoCalGas shall not be liable to the Customer if the amount of such charges is inaccurate in any way or contains charges that are in violation of the Eligible Agreement or any state or federal laws. The Participating Finance Company is not SoCalGas's agent for any purpose by virtue of the OBR billing procedures set forth in this Rule.

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(TO BE INSERTED BY UTILITY)
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ISSUED BY
Dan Skopec
 Vice President
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
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 EFFECTIVE Mar 21, 2021
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SAMPLE FORMS - CONTRACTS
AUTHORIZATION TO ADD CHARGES TO UTILITY BILL
Form 7200 (03/2021)

N

(See Form Attached)

(TO BE INSERTED BY UTILITY)
ADVICE LETTER NO. 5766
DECISION NO. D.15-06-008

ISSUED BY
Dan Skopec
Vice President
Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
SUBMITTED Feb 19, 2021
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AUTHORIZATION TO ADD CHARGES TO UTILITY BILL

You have applied for, or have entered into, an Eligible Agreement, as defined below, with the Participating Finance Company listed below. By signing this Authorization To Add Charges To Utility Bill (Authorization), you consent to allow Southern California Gas Company (SoCalGas) to include monthly Financing Charges for repayment of your Eligible Agreement in your monthly utility bill from the Utility for the Service Address (Bill), and you agree to pay those charges on the terms described below.

Please note that this Authorization contains summary information about On-Bill Repayment (OBR). Before you sign this document, you should first review the more detailed OBR Rules as developed by the California Hub for Energy Efficiency Financing (CHEEF)¹ and OBR Tariff² as approved by the California Public Utility Utilities Commission (CPUC).

In this document:

“**Customer**” means the individual or entity that takes service from the Utility.

“**Eligible Agreement**” means an agreement between you and a Participating Finance Company that satisfies the requirements for participation in OBR pursuant to OBR Rules, as developed by the CHEEF.

“**Financing Charge(s)**” means any and all principal, interest and other charges and fees payable by you in connection with your Eligible Agreement, as determined by your Participating Finance Company, and according to the terms of your Eligible Agreement, including fees for late or deficient payments.

“**OBR Charges**” means Financing Charges included in your Bill, pursuant to the OBR Tariff.

“**OBR Rules**” means rules and requirements for participation in OBR established by the CHEEF pursuant to Title 4, Division 13, Articles 6 and 7 of the California Code of Regulations.

“**Participating Finance Company**” means the finance or lessor service company approved for participation in OBR by the CHEEF pursuant to the OBR Rules, and shown in the Account Information section below.

“**Service Address(es)**” means the property or properties serviced by the Utility as shown in the Account Information section below.

1. **Authorization to Bill Financing Charges.** You authorize the Utility to include Financing Charges in your Bill until further notice. The Participating Finance Company will determine the amount of the monthly OBR Charge(s), and the Utility will include that amount in your Bill. The Utility does not verify the information provided by the Participating Finance Company. **OBR Charges may increase or decrease from month to month based on the terms of your Eligible Agreement, the inclusion of late charges and interest in accordance with your Eligible Agreement, and variations in the periods of time covered by each Utility billing cycle.**
2. **Payment.** You agree to pay the OBR Charges along with the other charges in your Bill by the due date for payment of the Bill. All payments should be made to the Utility. The Utility will forward your OBR Charge payments to the Participating Finance Company. If a funding account for the payment to the Utility is a credit card or checking account, the Utility will not forward your payment to the Participating Finance Company unless that account has sufficient available credit and/or funds to pay the full amount of the energy charges and the OBR Charges.
3. **Partial Payments.** Partial payments will be allocated as described below, depending on your participating Utility. Please note that, if the Utility stops billing you for OBR Charges before the Eligible Agreement is paid in full, you are still responsible for making payments for Financing Charges directly to the Participating Finance Company. Late payments may be subject to reporting to credit agencies by the Participating Finance Company.

¹ <http://www.treasurer.ca.gov/caeatfa/cheef/>. Note: The California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) administers the CHEEF as part of the Energy Efficiency Financing Pilot Programs.

² <http://www.socalgas.com/regulatory/tariffs/tm2/pdf/43.pdf>

AUTHORIZATION TO ADD CHARGES TO UTILITY BILL

For SDG&E and SoCalGas customers:

If you pay less than the total amount of your Bill (including OBR Charges), the amount you pay will be allocated to disconnectable charges as follows: current energy charges including deposits, energy related charges, and then any remaining amount will be applied to your OBR Charges and other third party charges according to the Utility's approved payment process and consistent with the OBR Tariff. Payments will be applied to past due disconnectable charges prior to any current charges. Unless your Bill is associated with a residential property, your failure to pay any of the components of your Bill (including OBR Charges) will subject your account to potential service disconnection as set forth in Rule No. 09, Discontinuance of Service.

For PG&E and SoCal Edison customers:

If you pay less than the total amount of your Bill (including OBR Charges), the amount you pay will be allocated to disconnectable charges as follows: OBR Charges and utility and other non-OBR charges in proportion to the amount owed for each, using pro rata distribution, according to the Utility's approved payment process and consistent with the OBR Tariff. Payments will be applied to past due disconnectable charges prior to any current charges. Unless your Bill is associated with a residential property, your failure to pay any of the components of your Bill (including OBR Charges) will subject your account to potential service disconnection as set forth in Rule No. 11, Discontinuance and Restoration of Service.

4. **Overpayments.** The Utility is not responsible for collecting, receiving, or remitting any prepayment of your OBR Charges. If you desire to pay some or all of the outstanding Eligible Agreement balance or other Financing Charges independent of the OBR Charges, such payment should be sent directly to the Participating Finance Company, not the Utility. If the Utility receives payment from you in excess of your current charges, such excess payment will first be applied to your overdue charges, if any, and will then be applied to future charges on your account. If you desire to be returned any excess amounts remaining on your account after all overdue charges are paid, you must notify the Utility and the Utility will then return such funds.
5. **Billing Inquiries and Disputes.** If you have any questions about your Eligible Agreement or your OBR Charges, including any concerns that you may have been incorrectly charged, please contact the Participating Finance Company. Any disputes about your Eligible Agreement or OBR Charges must be resolved between you and the Participating Finance Company in accordance with your Eligible Agreement documentation and applicable law. The Utility will not be involved in resolving such disputes.

Questions about the energy charges on your Bill should be directed to the Utility at the number shown on the Bill.

6. **Transfer of Payment Obligation.** In the event that you cease to be the Customer at the Service Address, you remain fully responsible for all remaining amounts due directly to the Participating Finance Company pursuant to the terms of the Eligible Agreement, and the Utility will have no further obligation to collect OBR Charges from you. Responsibility to pay OBR Charges may be voluntarily assumed by the subsequent customer at the same Service Address, pursuant to the OBR Tariff and the OBR Rules, if the Participating Finance Company and subsequent customer agree in writing to transfer responsibility for the Financing Charges, and the subsequent customer signs a new Authorization to authorize OBR Charges to be placed on its Bill and submits it to the Utility.
7. **Service Disconnection for Non-Payment of OBR Charges (non-Residential customers only).** You acknowledge that non-payment of your OBR Charges will result in a disconnection of your utility service consistent with the rules that generally apply to non-payment of your Bill, until such time that your OBR Charges and your utility charges are made current. Other rules for reconnection of service, including a requirement to post a security deposit, are set forth in Rule No. 11, Disputed Bills and Rule No. 6, Establishment and Re-Establishment of Credit.
8. **Jurisdiction.** This Authorization at all times shall be subject to such modifications as the CPUC may direct from time to time in the exercise of its jurisdiction.



A Sempra Energy utility

AUTHORIZATION TO ADD CHARGES TO UTILITY BILL

- 9. **Utility not Liable for Improvements.** The Utility shall have no liability in connection with, and makes no warranties, expressed or implied, regarding the improvements installed at the Service Address (Work). You will be responsible for any and all losses and damage you may suffer in connection with, and any claims by third parties resulting from, the Work. You shall release, indemnify and hold harmless the Utility, its affiliates, and their respective owners, officers, directors, employees and agents thereof, from and against all claims, demands, liabilities, damages, fines, settlements or judgments which arise from or are caused by (a) your breach of this Authorization; (b) any defects or problems with the Work, or the failure of the Work to deliver any anticipated energy efficiencies; (c) your failure to pay any amount due or claimed by a contractor with respect to the Work; or (d) the wrongful or negligent acts or omissions of any party (including a contractor) in the conduct or performance of the Work.
- 10. **Liability in Connection with OBR Charges and Conduct by Participating Finance Companies, Contractors, and Service Providers.** The Utility shall not be liable to you for any damages caused by or resulting from any acts, omissions or representations (i) made by the Participating Financing Company or a contractor or service provider in connection with soliciting customers for Qualified Measures, as defined in the OBR Tariff, or for the Eligible Agreement or (ii) the Participating Finance Company's failure to perform any commitment to you or misrepresentation to you. The amount of the OBR Charges shall be provided to the Utility by the CHEEF. The Utility shall not be liable to you if the amount of such charges is inaccurate in any way or contains charges that are in violation of the Eligible Agreement or any state or federal laws. The Participating Finance Company is not the Utility's agent for any purpose by virtue of the OBR billing procedures set forth in the OBR Tariff.

ACCOUNT INFORMATION

SERVICE ADDRESS DETAILS

Utility Name: _____

Service Address: _____

STREET

CA

CITY

STATE

ZIP

Utility Account Number: _____ Service Agreement Number / CSAID: _____

PARTICIPATING FINANCE COMPANY AND ELIGIBLE AGREEMENT INFORMATION

Name of Participating Finance Company: _____

Initial OBR Charge amount*: _____

**Note that the initial OBR Charge amount is merely the first monthly charge to appear on your Bill and may reflect a discount or promotion. As stated in Section 1. (Authorization to Bill Financing Charges), above, OBR Charges may increase or decrease from month to month based on the terms of your Eligible Agreement, the inclusion of late charges and interest in accordance with your Eligible Agreement, and variations in the periods of time covered by each Utility billing cycle.*



A  Sempra Energy utility

AUTHORIZATION TO ADD CHARGES TO UTILITY BILL

By signing below, you hereby authorize the Utility to add Financing Charges to your Bill for the Service Address and Utility Account Number shown above.

You certify that you are the Utility's Customer financially responsible for charges to the Utility account represented by the Utility Account Number shown above, or an officer, representative, or agent authorized to act on behalf of the Utility's Customer, and hereby direct Financing Charges to be placed on the Bill.

Customer Name: _____
(ENTITY or INDIVIDUAL)

Individual Signatory Name (your name, if different): _____
FIRST LAST

SIGNATURE

TELEPHONE NUMBER

Executed this _____ day of _____
MONTH YEAR

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(TO BE INSERTED BY UTILITY)
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