

October 1, 2021

**ADVICE 4601-E**

(Southern California Edison - U 338-E)

**ADVICE 3860-E/3021-G**

(San Diego Gas & Electric - U 902-M)

**ADVICE 5876-G**

(Southern California Gas Company – U 904 G)

**ADVICE 4501-G/6346-E**

(Pacific Gas and Electric Company – U39 M)

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA  
ENERGY DIVISION

**SUBJECT:** Joint Investor-Owned Utilities Advice Letter Pursuant to  
Decision 21-06-015 for the Online Data Management and  
Visualization Dashboard Plan

**PURPOSE**

In accordance with Decision (D.)21-06-015, Ordering Paragraph (OP) 187, Southern California Edison Company (SCE),<sup>1</sup> San Diego Gas & Electric Company (SDG&E), Pacific Gas and Electric Company (PG&E), and Southern California Gas Company (SoCalGas), (collectively, the joint investor-owned utilities (IOUs)) hereby jointly submit to the California Public Utilities Commission (Commission or CPUC) this Tier 2 Advice Letter (AL) detailing the plan for an online data management and visualization dashboard.

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<sup>1</sup> Pursuant to Rule 1.8(d) of the Commission's Rules of Practice and Procedure, SCE is authorized to submit this joint advice letter on behalf of the IOUs.

## **BACKGROUND**

On June 3, 2021, the Commission issued D.21-06-015 (Decision) approving the IOUs' California Alternate Rates for Energy (CARE), Energy Savings Assistance (ESA), and Family Electric Rate Assistance (FERA) program applications for program years 2021-2026.

Per OP 186 of the Decision, the IOUs are to incorporate the low-income program reporting into a single online data management and visualization dashboard that will allow for utility-specific annual historical ESA, CARE, and FERA data to be referenced. In addition, the Decision requires the online data management and visualization dashboard to be updated on an annual basis beginning no later than December 31, 2023, and allow users to access at least 10 year of historical ESA, CARE, and FERA data.<sup>2</sup> The dashboard will be updated annually within 30 days of the ESA annual reports May 1 submission.<sup>3</sup>

Pursuant to OP 187, each utility's respective plan for the online data management and visualization dashboard shall be detailed in a jointly submitted Tier 2 AL by no later than 120 days after approval of the Decision.

Per the Decision, the Tier 2 AL will contain the following information:

- Suggested software for hosting the dashboard and options for where the dashboard could be hosted.
- Suggested ESA data to be stored on the data management systems, specifically focusing on ESA budgets, expenditures, households treated and energy savings by technology groups currently represented in the ESA Annual Report Excel tables ESA-Tables 1, 1a, 2 and 4.
- Suggested CARE and FERA data to be stored on the data management systems, specifically focusing on CARE and FERA budgets, expenditures, eligible populations and enrolled household counts, enrollment, recertification, attrition, penetration, PEV, and any other data relevant to monitoring CARE and FERA program operations.
- Discussion of the potential for expansion of data, beyond items noted above, in the future, and how suggested software and hosting location could accommodate expansion without a full rebuild.
- Discussion on whether this online data management system would function simply as a repository of summarized data prepared by the IOUs (i.e., an online format for the current reports), or whether detailed program tracking data on the ESA, CARE and FERA programs would be uploaded into this system and

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<sup>2</sup> D.21-06-015, OP 186.

<sup>3</sup> *Id.*, p. 436.

subsequent data summaries would occur by manipulating granular program data, as is currently done with the CEDARS environment used by the main energy efficiency portfolios.

- Sample template for aggregating annual and historical ESA, CARE and FERA data to be represented.
- Sample layout of what the visualization dashboard could look like when completed.
- Timeline for execution and budget needed for completing the online data management and visualization dashboard (using existing reporting budgets funds).<sup>4</sup>

While the online data management and visualization dashboard is developed and tested, the Decision directs the IOUs to continue to issue their monthly and annual ESA, CARE and FERA reports in PDF and spreadsheet format to the appropriate service lists during and after construction of the online data management and visualization dashboard. If the IOUs or Energy Division (ED) determines that the online data management and visualization dashboard could replace the need for spreadsheet and PDF reports, the IOUs may submit another Tier 2 AL requesting that the annual data reporting medium and process for the ESA, CARE and FERA program be updated to reflect this change.<sup>5</sup>

## **DISCUSSION**

The IOUs agree on a plan for constructing the online data management and visualization dashboard as described further below:

### **Data Management and Dashboard Hosting**

The IOUs recommend using California Energy Data and Reporting System (CEDARS) as the host for the online data management system. Currently, CEDARS securely manages data associated with California Energy Efficiency (EE) programs, ensuring quality and improving communication between EE Program Administrators (PAs) and Low-Income programs. Using CEDARS will make reporting for ESA, CARE, and FERA a more streamlined process and will allow all parties to compare and contrast Low-Income programs data across the various utility territories on one centralized platform. Furthermore, the CEDARS tool will allow a user to conduct analyses across various time periods, and view trends in spending, installations, and enrollments for each utility.

Additionally, the IOUs recommend using Power Business Intelligence (BI) or Power BI as the tool to create the visualization dashboard. Power BI connects to and visualizes data using a unified, scalable platform for self-service and enterprise business

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<sup>4</sup> D.21-06-015 at 436-437.

<sup>5</sup> *Id.*, OP 188.

intelligence. It's easy to use and helps provide deeper data insight.<sup>6</sup> As a standardized Microsoft application, this tool is easily accessible, allows for easier troubleshooting, if applicable, and allows the IOUs to share a collective expertise in utilizing the tool which in turn reduces the training needed for IOU employees to upload data.

### Data Storage

CEDARS can house the data required by the Decision for each utility's Low-Income programs. For ESA, the system can house the budget, expenditures, households treated, and energy savings currently represented in the ESA Annual Report Tables 1, 1a, 2 and 4. For CARE and FERA, the system can house budgets, expenditures, eligible populations' household counts, enrollment, recertification, attrition, penetration, post-enrollment verification (PEV) numbers, and any other data relevant to monitor CARE and FERA program operations using current CARE Annual Report Tables 1, 2, 3, and 6.

At this time, the IOUs do not utilize standard reporting tables for FERA. However, as defined in the Decision, any FERA reporting template approved by Energy Division will include specific reporting criteria and would apply to all three electric IOUs offering FERA programs.<sup>7</sup>

The system would allow users to access at least 10 years of historical ESA, CARE, and FERA data as noted in the Decision.<sup>8</sup> However, the data that is ultimately stored in the system is subject to change, pending Commission and IOU input, until final specifications are approved and construction is completed.

### Potential for Expansion of Data

The IOUs have determined that an expansion of the data could be possible if the CEDARS tool is approved. In the future, after proof of concept, CEDARS could potentially replace monthly reports, and for historical reference could house the PDFs and Excel spreadsheets used in reporting these programs today. In addition to CEDARS being the official repository for both summarized data from existing Annual ESA and CARE reports, the IOUs envision CEDARS housing granular data from ESA, CARE, and FERA, aggregated at the appropriate level if needed to ensure confidentiality, which would then feed Power BI to create various dashboards.

The ED would maintain CEDARS, and the joint IOUs would work with ED to facilitate required changes. Additionally, any required enhancements to CEDARS for the dashboard/data visualization platform would be cost-shared by the IOUs per the usual splits (PG&E 30 percent, SCE 30 percent, SoCalGas 25 percent, SDG&E 15 percent).

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<sup>6</sup> <https://powerbi.microsoft.com/en-us/what-is-power-bi/>

<sup>7</sup> *Id.*, pp.435.

<sup>8</sup> *Id.*, pp.437.

Functionality

The primary purpose the joint IOUs envision for the data management and visualization tool is to provide a single, unified source for flexible searching and retrieval of low-income data; allowing drilldowns of ESA, CARE, and FERA program information to various levels. However, the IOUs are mindful of customer privacy issues and plan to work with the software developer on how to properly aggregate data, so that no customer confidential data will be included, similar to how EE program data is currently managed within CEDARS.

The IOUs plan to utilize the data exchange recommended by the CEDARS developer.

Sample Template and Layout

Until the new reporting standards are finalized, neither sample templates nor visualization layouts can be designed.<sup>9</sup> Both will be created once the reporting is finalized and will be shared during the ongoing process of system development.

Timeline and Budget

Figure 1 is an overview of the joint IOUs’ proposed timeline for the development of the online data management and visualization dashboard. The dates noted are estimates and subject to change.

Figure 1: Joint IOU Online Data Management and Visualization Timeline

Year	2021		2022				2023			
Quarter	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Joint IOU DV Team	Review Decision, Form Joint IOU Working Group, Develop Tier 2 Advice Letter	Submit Final Tier 2 AL, build deeper proj timeline, work w/current CEDARS admin	Develop BRD, finalize SOW, and begin system design		Work with CEDARS admin to implement design, complete UAT, and initiate implementation				Stress test system, implement any identified changes, finalize, and go live 1/1/24	

Due to the expertise that the CEDARS developer has with utility programs and to leverage synergies with other programs, the IOUs intend to direct-award the contract to the developer of CEDARS to build and maintain the Low-Income online data management system, as opposed to conducting a Request For Proposal (RFP). This approach is expected to save both time and money.

The Decision did not authorize a separate budget amount for the new Low-Income online data management system. However, the Joint IOUs have allocated an estimated budget of \$500,000 for the design and development of the Low-Income CEDARS tool along with an additional \$100,000 for annual management and operations of the

<sup>9</sup> In various sections throughout the Decision, it is noted that “the reporting template approved by Energy Division will include all the specifics of the new reporting.” (e.g., pp. 206, 218-219, etc.).

visualization platform. Cost will be shared using the following percentages: 30 percent PG&E, 30 percent SCE, 25 percent SoCalGas, and 15 percent SDG&E. The required ongoing maintenance and support would be funded by ED as currently established for EE management programs. Since the final project scope and specifications have yet to be determined, the estimated budget is subject to change.

### **TIER DESIGNATION**

Pursuant to OP 187 of D.21-06-015, this advice letter is submitted with a Tier 2 designation.

### **EFFECTIVE DATE**

This advice letter will become effective upon approval, and IOUs respectfully request an approval of November 1, 2021, 30 days after the submission date.

### **PROTEST**

Anyone wishing to protest this advice letter may do so electronically and protests must be received no later than 20 days after the date of this advice letter. Protests should be submitted to:

CPUC, Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, California 94102  
E-mail: [EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

Copies should also be mailed to the attention of the Director, Energy Division, Room 4004 (same address above).

In addition, protests and all other correspondence regarding this advice letter should also be sent by letter and transmitted via facsimile or electronically to the attention of:

**For SCE:**

Shinjini C. Menon  
Managing Director, State Regulatory Operations  
Southern California Edison Company  
8631 Rush Street  
Rosemead, California 91770  
Telephone (626) 302-3377  
Facsimile: (626) 302-9645  
E-mail: [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com)

Tara S. Kaushik  
Managing Director, Regulatory Relations  
c/o Karyn Gansecki  
Southern California Edison Company  
601 Van Ness Avenue, Suite 2030  
San Francisco, California 94102  
Facsimile: (415) 929-5544  
E-mail: [Karyn.Gansecki@sce.com](mailto:Karyn.Gansecki@sce.com)

**For SDG&E:**

Attn: Greg Anderson  
Regulatory Tariff Manager  
E-Mail: [GAnderson@sdge.com](mailto:GAnderson@sdge.com) & [SDGETariffs@sdge.com](mailto:SDGETariffs@sdge.com)

**For PG&E:**

Sidney Bob Dietz II  
Director, Regulatory Relations  
c/o Megan Lawson  
Pacific Gas and Electric Company  
77 Beale Street, Mail Code B13U  
P.O. Box 770000  
San Francisco, California 94177  
Facsimile: (415) 973-3582  
E-mail: [PGETariffs@pge.com](mailto:PGETariffs@pge.com)

**For SoCalGas:**

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](mailto:ROrtiz@socalgas.com)

There are no restrictions on who may submit a protest, but the protest shall set forth specifically the grounds upon which it is based and must be received by the deadline shown above.

### **NOTICE**

In accordance with General Rule 4 of GO 96-B, SCE is serving copies of this advice letter to the interested parties shown on the attached GO 96-B, A.14-11-007 et al, and A.19-11-003 et al service lists. Address change requests to the GO 96-B service list should be directed by electronic mail to [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com) or at (626) 302-3719. For changes to all other service lists, please contact the Commission's Process Office at (415) 703-2021 or by electronic mail at [Process\\_Office@cpuc.ca.gov](mailto:Process_Office@cpuc.ca.gov). Further, in accordance with Public Utilities Code Section 491, notice to the public is hereby given by submitting and keeping the advice letter at SCE's corporate headquarters. To view other SCE advice letters submitted with the Commission, log on to SCE's web site at <https://www.sce.com/wps/portal/home/regulatory/advice-letters>.

For questions, please contact Joni Key or by electronic mail at [joni.key@sce.com](mailto:joni.key@sce.com).

**Southern California Edison Company**

/s/ Shinjini C. Menon  
Shinjini C. Menon

SCM:jk:cm  
Enclosures





# 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 proposed<sup>1</sup>:

Pending advice letters that revise the same tariff sheets:

<sup>1</sup>Discuss 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](mailto: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:

## ENERGY Advice Letter Keywords

Affiliate	Direct Access	Preliminary Statement
Agreements	Disconnect Service	Procurement
Agriculture	ECAC / Energy Cost Adjustment	Qualifying Facility
Avoided Cost	EOR / Enhanced Oil Recovery	Rebates
Balancing Account	Energy Charge	Refunds
Baseline	Energy Efficiency	Reliability
Bilingual	Establish Service	Re-MAT/Bio-MAT
Billings	Expand Service Area	Revenue Allocation
Bioenergy	Forms	Rule 21
Brokerage Fees	Franchise Fee / User Tax	Rules
CARE	G.O. 131-D	Section 851
CPUC Reimbursement Fee	GRC / General Rate Case	Self Generation
Capacity	Hazardous Waste	Service Area Map
Cogeneration	Increase Rates	Service Outage
Compliance	Interruptible Service	Solar
Conditions of Service	Interutility Transportation	Standby Service
Connection	LIEE / Low-Income Energy Efficiency	Storage
Conservation	LIRA / Low-Income Ratepayer Assistance	Street Lights
Consolidate Tariffs	Late Payment Charge	Surcharges
Contracts	Line Extensions	Tariffs
Core	Memorandum Account	Taxes
Credit	Metered Energy Efficiency	Text Changes
Curtable Service	Metering	Transformer
Customer Charge	Mobile Home Parks	Transition Cost
Customer Owned Generation	Name Change	Transmission Lines
Decrease Rates	Non-Core	Transportation Electrification
Demand Charge	Non-firm Service Contracts	Transportation Rates
Demand Side Fund	Nuclear	Undergrounding
Demand Side Management	Oil Pipelines	Voltage Discount
Demand Side Response	PBR / Performance Based Ratemaking	Wind Power
Deposits	Portfolio	Withdrawal of Service
Depreciation	Power Lines	