

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



**Southern California Gas Company**  
**GAS (Corp ID 904)**  
**Status of Advice Letter 5996G**  
**As of July 13, 2022**

Subject: Revisions to SoCalGas' Form 7200, Authorization to Add Charges to Utility Bill

Division Assigned: Energy

Date Filed: 06-21-2022

Date to Calendar: 06-24-2022

Authorizing Documents: None

<b>Disposition:</b>	<b>Accepted</b>
<b>Effective Date:</b>	<b>07-21-2022</b>

Resolution Required: No

Resolution Number: None

Commission Meeting Date: None

CPUC Contact Information:

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

AL Certificate Contact Information:

Gary Lenart  
(213) 244-2424

[GLenart@socalgas.com](mailto:GLenart@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- Disposition of Filing (Accepted, Rejected, Withdrawn, etc.)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](mailto: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](mailto:JMock@socalgas.com)

June 21, 2022

Advice No. 5996  
(U 904 G)

Public Utilities Commission of the State of California

**Subject: Revisions to SoCalGas' Form 7200, Authorization to Add Charges to Utility Bill**

Southern California Gas Company (SoCalGas) hereby submits this Advice Letter (AL) for approval by the California Public Utilities Commission (Commission) revisions to SoCalGas' Sample Forms, Authorization to Add Charges to Utility Bill (Form 7200), applicable throughout its service territory, as shown on Attachment A.

**Purpose**

This submittal requests to modify SoCalGas' Form 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) ),<sup>1</sup> with the purpose of updating the current individual IOU forms to a standardized, statewide authorization form prior to the commencement of the On-Bill Repayment (OBR) feature for the Customer to provide the Utility with their consent to place Financing Charges on their Utility bill, and the relevant financing programs used in Form 7200 to be consistent across all of the IOUs. These changes will allow for the program administrator to utilize one form for all IOUs and result in a more streamlined efficient process IOU customers.

**Background**

The OBR feature launched in first quarter of 2022. The OBR program allows customers to repay energy efficiency (EE) loans secured through private capital lenders directly on their energy bill. CAEATFA recommends a standardized authorization form in order to provide a more streamlined process for OBR customers to repay the loans secured from private capital lenders.

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<sup>1</sup> 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.

In Decision (D.) 13-09-044, the Commission approved two-year financing pilot programs for Residential, Affordable Multifamily, and Small Business customers utilizing private capital funds to encourage deeper EE retrofits. The Small Business and Affordable Multifamily 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 better financing terms to customers pursuing EE upgrades. To administer these financing programs, the California Hub for Energy Efficiency (CHEEF) was created. Lastly, D.21-08-006, has authorized up to an additional \$75.2 million in ratepayer EE funding. This added funding will become available on July 1, 2022 and will sunset as of June 30, 2027.

### **CAEATFA Recommended Tariff Revisions**

Revisions to Form 7200, Authorization to Add Charges to Utility Bill, include:

- Remove fillable text field and replace with “the electric or gas utility checked below”
- Add columns for Electric Service and Natural Gas Service with fillable checkboxes
- Add names of the IOUs next to fillable checkboxes
- Add context for the statewide form “The purpose of this Authorization is for the Customer to provide the Utility with the Customer’s written consent to place Financing Charges on their utility bill. This Authorization will be accepted by each of the Utilities listed. Please complete this Authorization in its entirety.”
- Add logos for each of the IOUs
- Add customer authorization form numbers for each participating IOU in the footer.
- Add website address for each participating IOUs customer authorization form to footnote 2.
- Add CAEATFA website address to footnote 1.
- Update order of the Tariff links so IOUs with both electric and gas tariffs are shown in the order of electric then gas.

The revised Form 7200 is included herein as Attachment A. A redlined version of SoCalGas’ Form 7200 is available upon request.

### **Protests**

Anyone may protest this AL 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 submitted electronically and must be received within 20 days after the date of this AL, which is July 11, 2022. Protests should be submitted to the attention of the Energy Division Tariff Unit at:

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

In addition, protests and all other correspondence regarding this AL should also be sent electronically to the attention of:

Attn: Gary Lenart  
Regulatory Tariff Manager  
E-mail: [GLenart@socalgas.com](mailto:GLenart@socalgas.com)  
E-mail: [Tariffs@socalgas.com](mailto:Tariffs@socalgas.com)

### **Effective Date**

SoCalGas asserts this AL is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B, as it is compliant with Ordering Paragraph 6 of D.15-06-008. SoCalGas respectfully requests that this submittal be approved effective July 21, 2022, which is 30 days from the date this AL was submitted.

### **Notice**

A copy of this AL is being sent to SoCalGas' GO 96-B service list and the Commission's service list in A.12-07-003 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](mailto: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](mailto: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 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:

ATTACHMENT A  
Advice No. 5996

Cal. P.U.C. Sheet No.	Title of Sheet	Cancelling Cal. P.U.C. Sheet No.
Revised 59920-G	SAMPLE FORMS - CONTRACTS, AUTHORIZATION TO ADD CHARGES TO UTILITY BILL, Form 7200 (07/2022)	Revised 58563-G
Revised 59921-G	TABLE OF CONTENTS	Revised 59914-G
Revised 59922-G	TABLE OF CONTENTS	Revised 59919-G



SAMPLE FORMS - CONTRACTS  
AUTHORIZATION TO ADD CHARGES TO UTILITY BILL  
Form 7200 (07/2022)

(See Form Attached)

(TO BE INSERTED BY UTILITY)

ADVICE LETTER NO. 5996  
DECISION NO.

1C9

ISSUED BY

**Dan Skopec**  
Vice President  
Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)

SUBMITTED Jun 21, 2022  
EFFECTIVE Jul 21, 2022

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

# 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.

Electric	Natural Gas	
<u>Service</u>	<u>Service</u>	
<input type="checkbox"/>	<input type="checkbox"/>	<i>Pacific Gas and Electric Company</i>
<input type="checkbox"/>	<input type="checkbox"/>	<i>San Diego Gas &amp; Electric Company</i>
<input type="checkbox"/>	<input type="checkbox"/>	<i>Southern California Edison Company</i>
N/A	<input type="checkbox"/>	<i>Southern California Gas Company</i>

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)<sup>1</sup> and OBR Tariff<sup>2</sup> as approved by the California Public Utility Utilities Commission (CPUC).

The purpose of this Authorization is for the Customer to provide the Utility with the Customer’s written consent to place Financing Charges on their utility bill. This Authorization will be accepted by each of the Utilities listed. Please complete this Authorization in its entirety.



<sup>1</sup> <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.

<sup>2</sup> <http://www.socalgas.com/regulatory/tariffs/tm2/pdf/43.pdf>  
[https://library.sce.com/content/dam/sce-doclub/public/regulatory/tariff/electric/schedules/other-rates/ELECTRIC\\_SCHEDULES\\_OBR.pdf](https://library.sce.com/content/dam/sce-doclub/public/regulatory/tariff/electric/schedules/other-rates/ELECTRIC_SCHEDULES_OBR.pdf)  
[https://library.sce.com/content/dam/sce-doclub/public/regulatory/tariff/santa-catalina-island-gas/schedules/rates/GAS\\_SCHEDULES\\_G-OBR.pdf](https://library.sce.com/content/dam/sce-doclub/public/regulatory/tariff/santa-catalina-island-gas/schedules/rates/GAS_SCHEDULES_G-OBR.pdf)  
[https://www.pge.com/tariffs/assets/pdf/tariffbook/ELEC\\_SCHEDULES\\_E-OBR.pdf](https://www.pge.com/tariffs/assets/pdf/tariffbook/ELEC_SCHEDULES_E-OBR.pdf)  
[https://www.pge.com/tariffs/assets/pdf/tariffbook/GAS\\_SCHEDULES\\_G-OBR.pdf](https://www.pge.com/tariffs/assets/pdf/tariffbook/GAS_SCHEDULES_G-OBR.pdf)  
[https://tariff.sdge.com/tm2/pdf/ELEC\\_ELEC-RULES\\_ERULE\\_43.pdf](https://tariff.sdge.com/tm2/pdf/ELEC_ELEC-RULES_ERULE_43.pdf)  
[https://tariff.sdge.com/tm2/pdf/GAS\\_GAS-RULES\\_GRULE\\_43.pdf](https://tariff.sdge.com/tm2/pdf/GAS_GAS-RULES_GRULE_43.pdf)

# AUTHORIZATION TO ADD CHARGES TO UTILITY BILL

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.

## 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.

# AUTHORIZATION TO ADD CHARGES TO UTILITY BILL

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.
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.

# AUTHORIZATION TO ADD CHARGES TO UTILITY BILL

## 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.*

**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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California Producer Interconnection Agreement (Form 6454) .....	54249-G
California Producer Interconnect Collectible System Upgrade Agreement (Form 6456) .....	49733-G
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(Continued)

(TO BE INSERTED BY UTILITY)  
 ADVICE LETTER NO. 5996  
 DECISION NO.

ISSUED BY  
**Dan Skopec**  
 Vice President  
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)  
 SUBMITTED Jun 21, 2022  
 EFFECTIVE Jul 21, 2022  
 RESOLUTION NO. \_\_\_\_\_

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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)

(TO BE INSERTED BY UTILITY)  
 ADVICE LETTER NO. 5996  
 DECISION NO.

ISSUED BY  
**Dan Skopec**  
 Vice President  
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)  
 SUBMITTED Jun 21, 2022  
 EFFECTIVE Jul 21, 2022  
 RESOLUTION NO. \_\_\_\_\_