

IOU/POU Data Flows



AYAD AL-SHAIKH
APRIL 2017

IOU/POU Process Flow

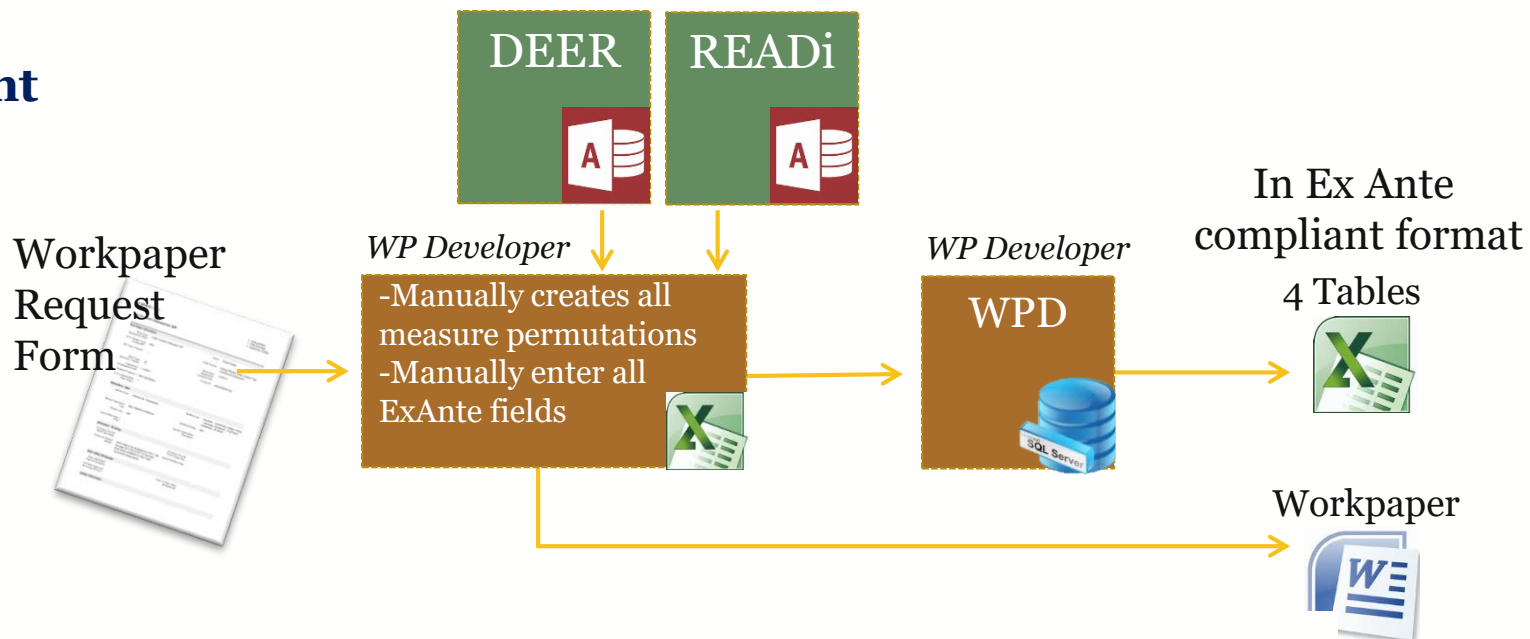
2

- Workpaper Development & Approval
 - PG&E
 - SCE
 - SDG&E
 - SCG
 - eTRM Ecosystem

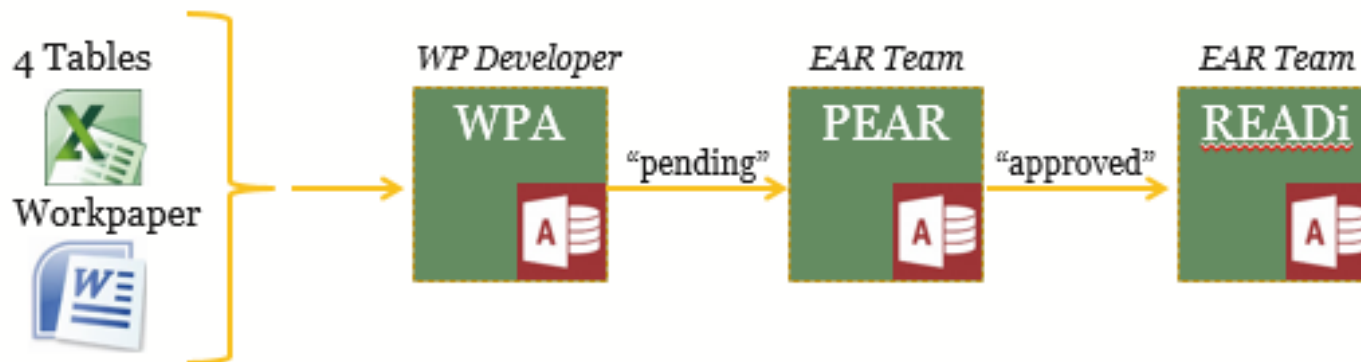
PG&E Process Flow

3

Workpaper Development



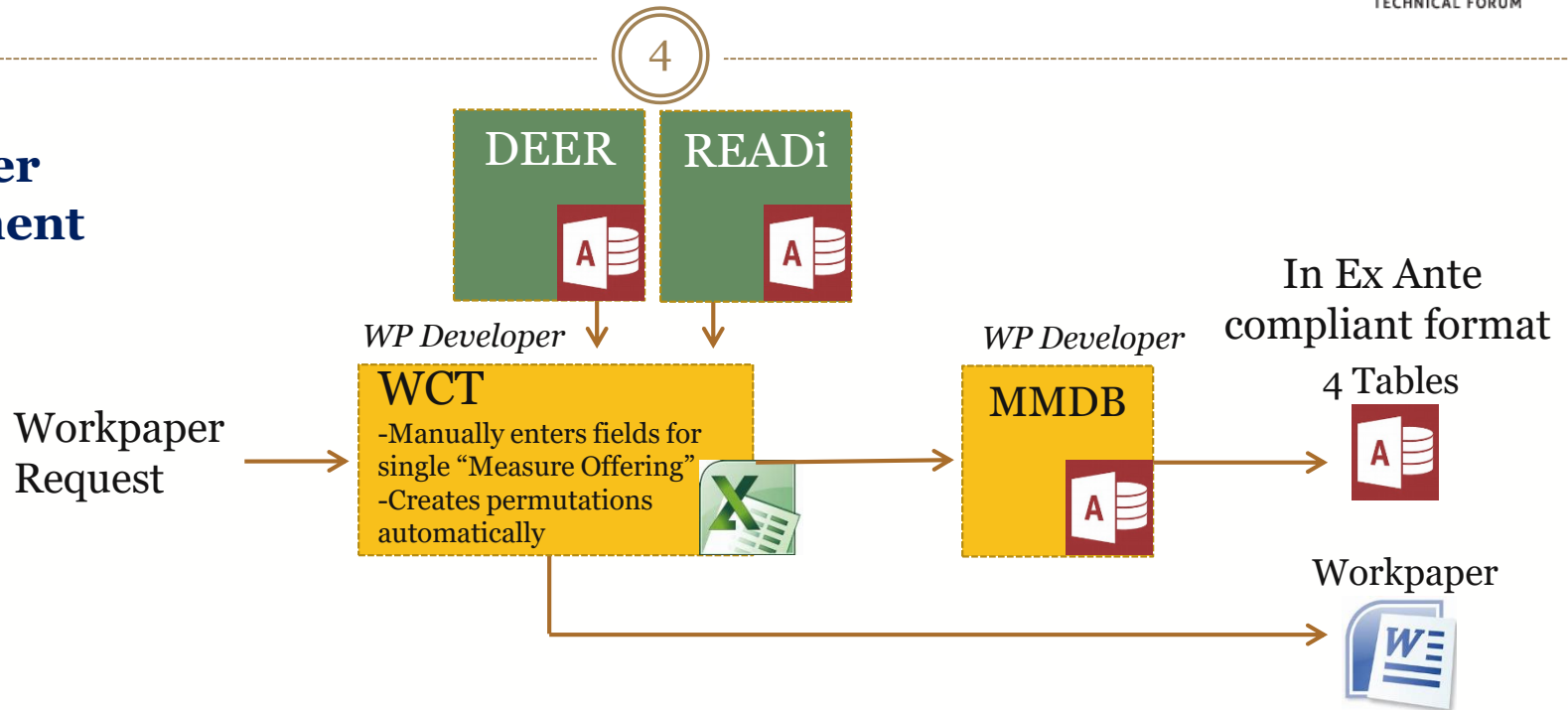
Workpaper Approval



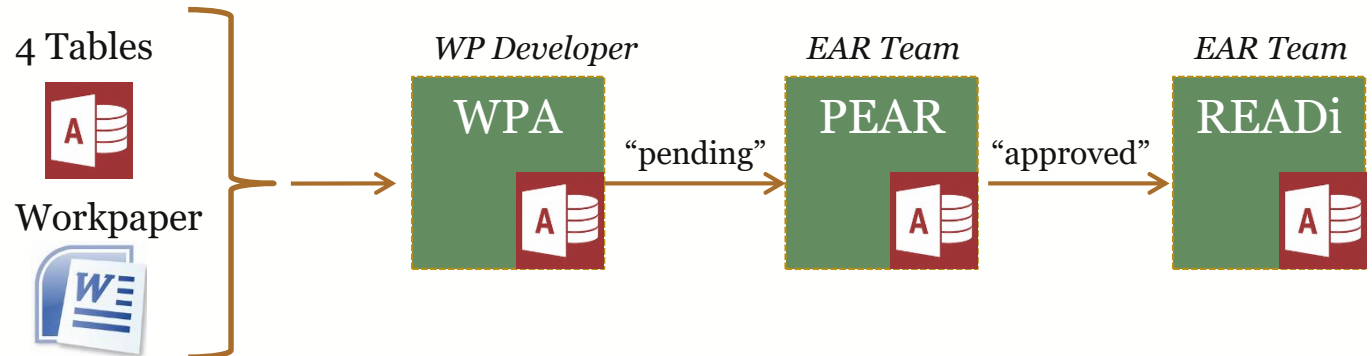
SCE Process Flow

4

Workpaper Development



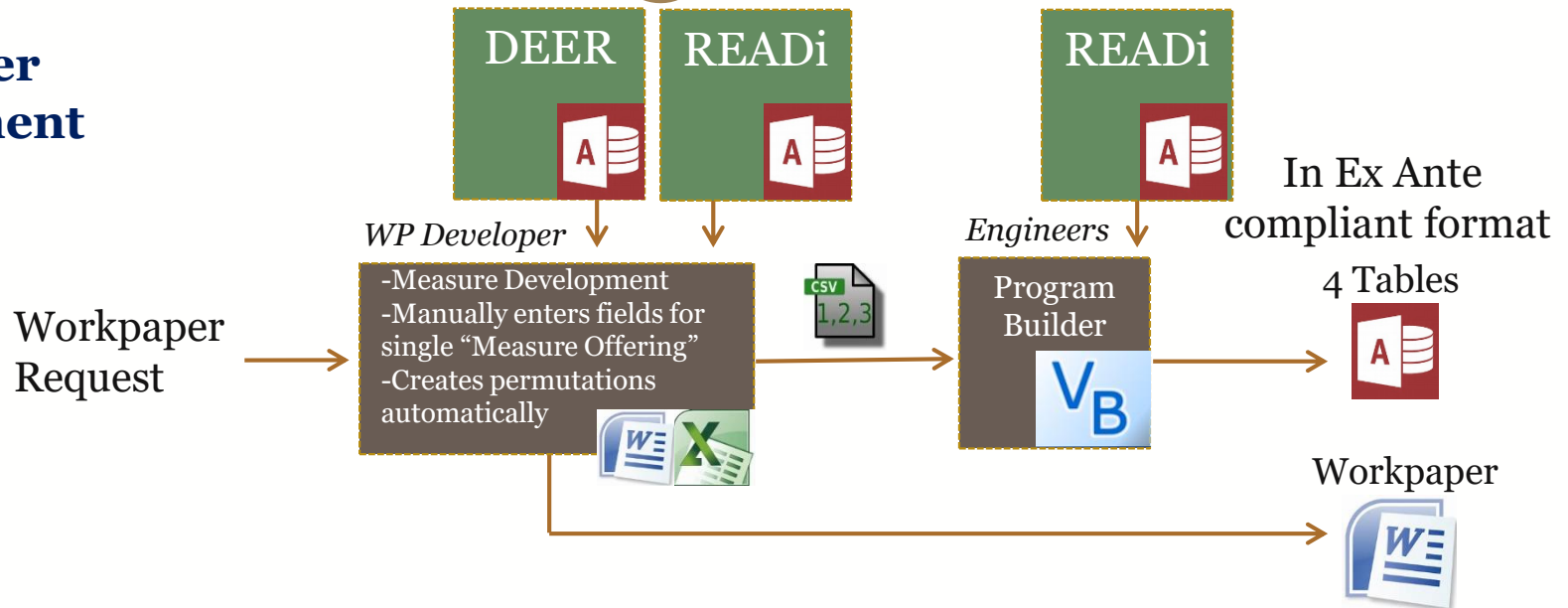
Workpaper Approval



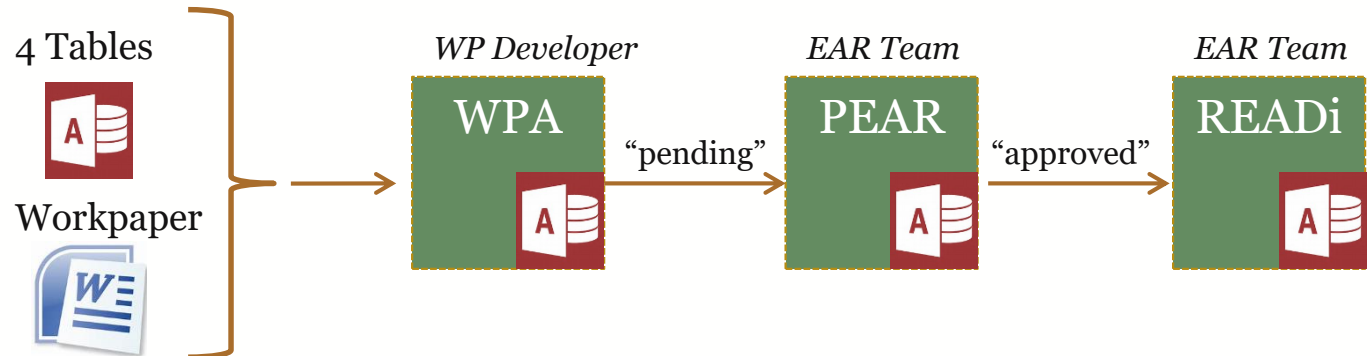
SCG/SDG&E Process Flow

5

Workpaper Development



Workpaper Approval



“Generic” Measure *Development* in eTRM Ecosystem

6

Measure Request

- IOU
- POU
- Implementer
- Product Mfg'er
- Etc...



WP Developer Approved Pool

- “Best Available Data”
- Measure input tables
- Sources
- Narrative

eTRM



“In Process”

“Pending”

“Submitted”

“Approved”



*Internal &
Cal TF Staff
QC*



*Cal TF
Review &
Affirmation*



*CPUC Review
(EM&V
Contractor)*



IOU Use

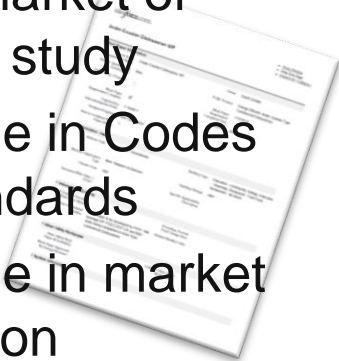
POU Use

“Generic” Measure *Update* in eTRM Ecosystem

7

Measure Update

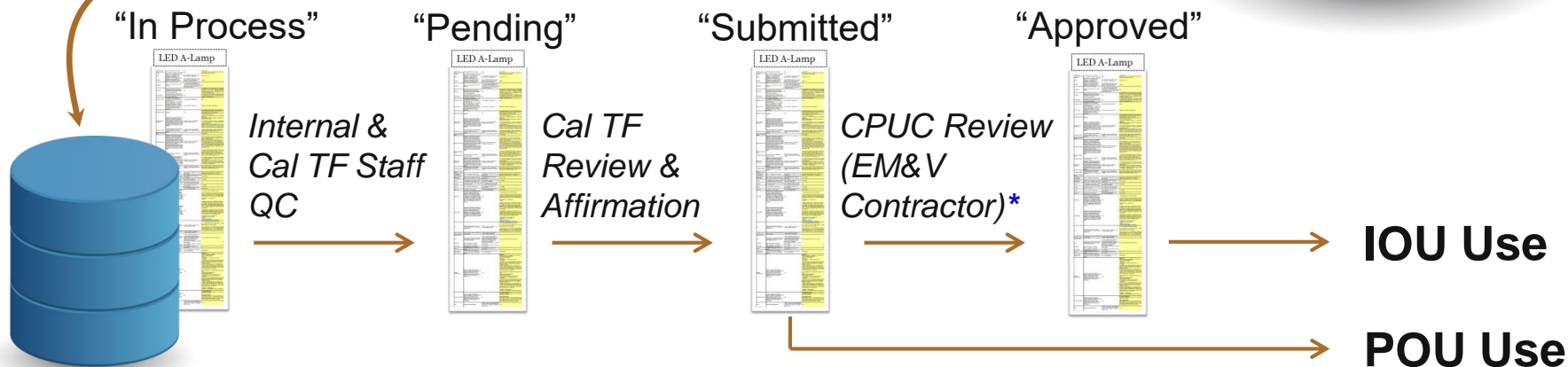
- New market or EM&V study
- Change in Codes & Standards
- Change in market condition



WP Developer Approved Pool and/or Cal TF Staff

- “Best Available Data”
- Measure input tables
- Sources
- Narrative

eTRM



IOU/POU Process Flow

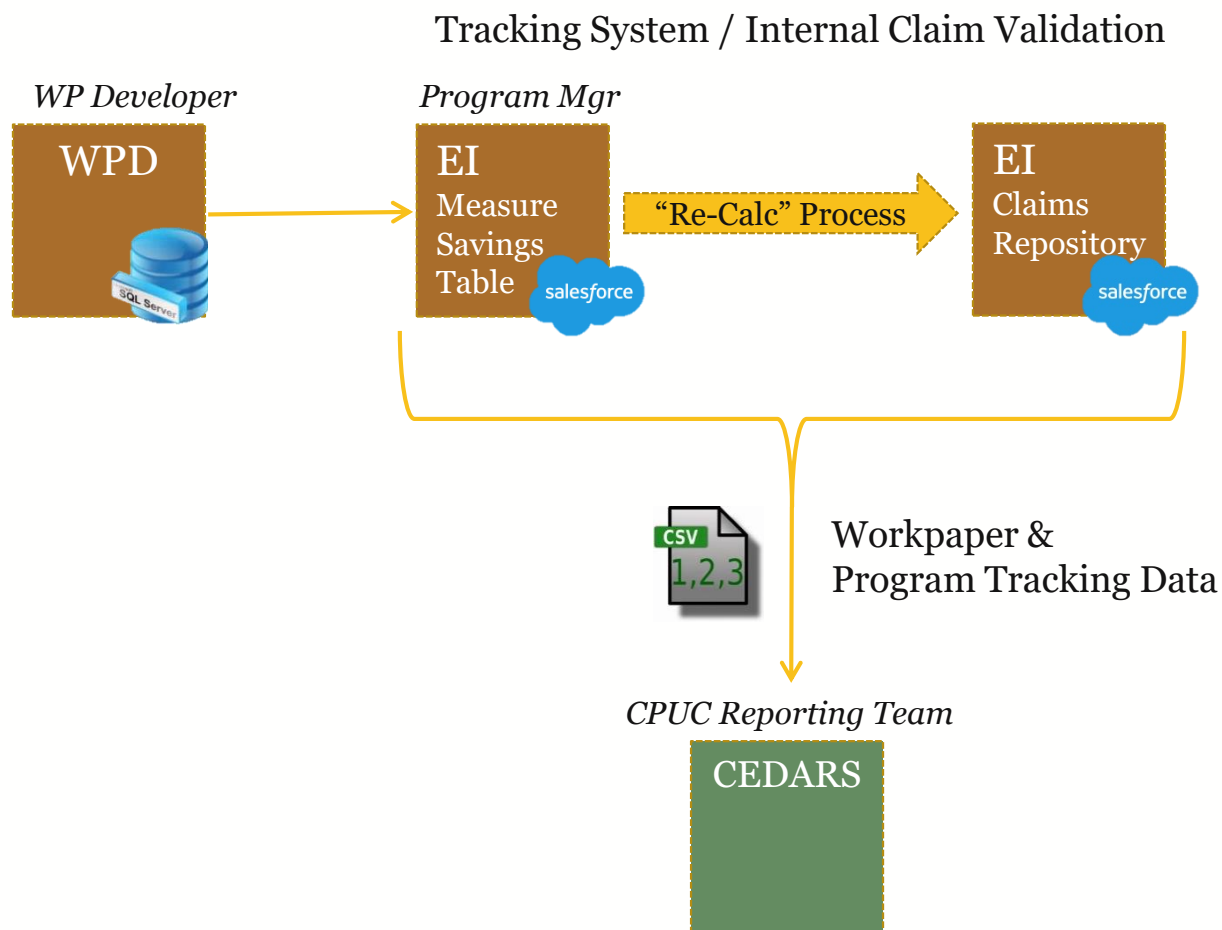
9

- Reporting
 - PG&E
 - SCE
 - SDG&E / SCG
 - LADWP
 - eTRM Ecosystem

PG&E Process Flow

10

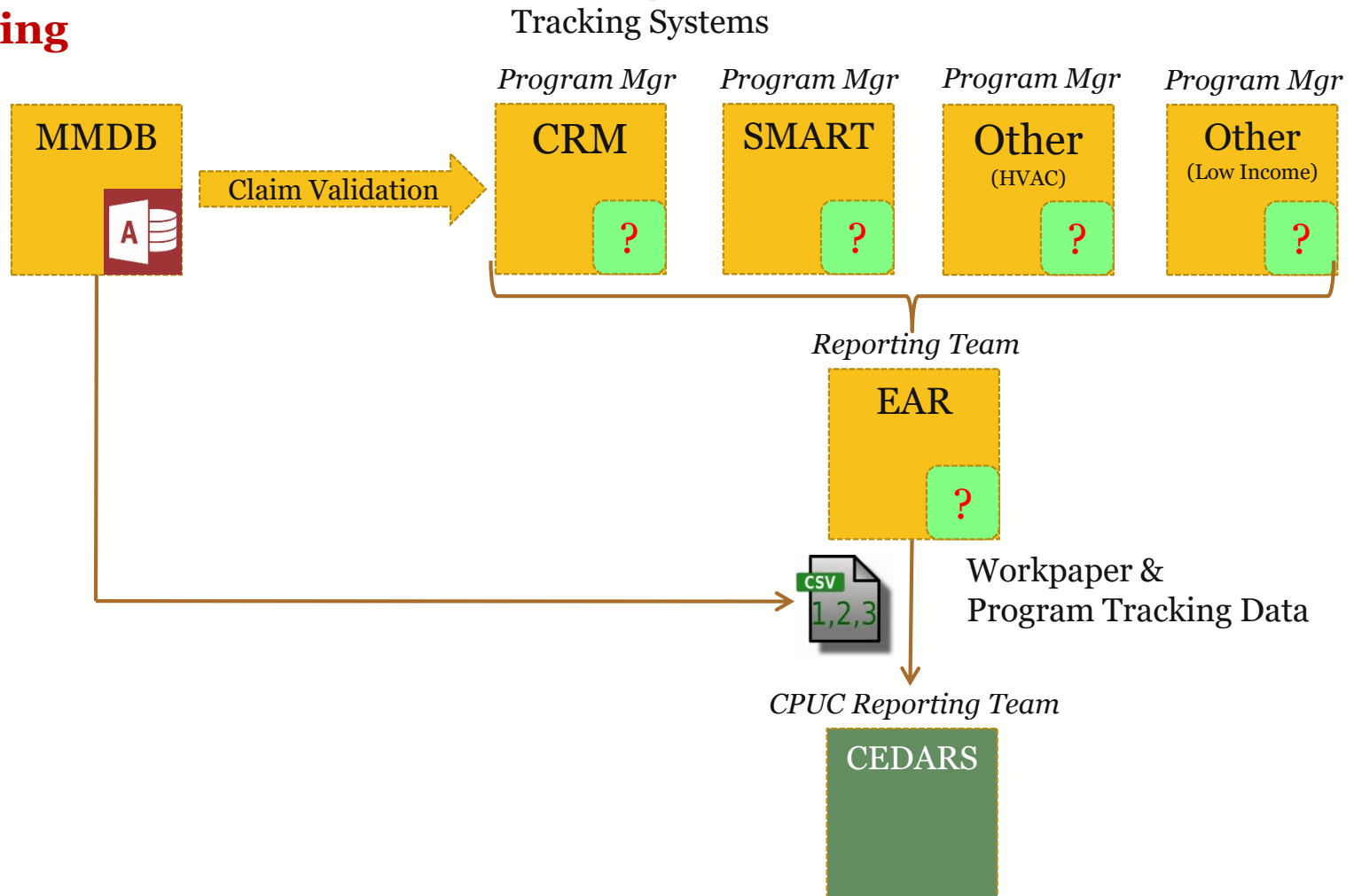
Reporting



SCE Process Flow

11

Reporting

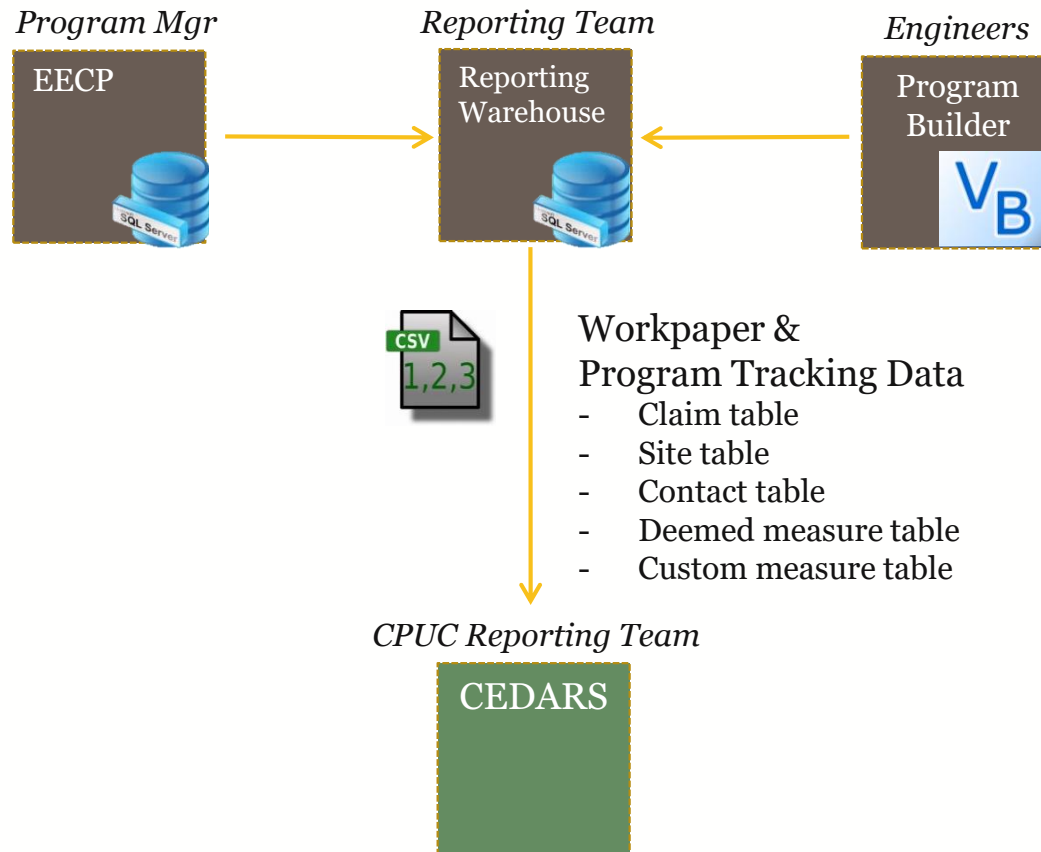


SCG/SDG&E Process Flow

12

Reporting

Tracking System / Internal Claim Validation



LADWP Process Flow

13

Reporting

Tracking System

Program Mgr

Program
Tracking
Databases



Reporting Team

Business
Intelligence



Annual SB 1037 Reporting

- E3 Calculator
- Narrative



NCPA

Consolidate
Reports

SCPPA

Consolidate
Reports

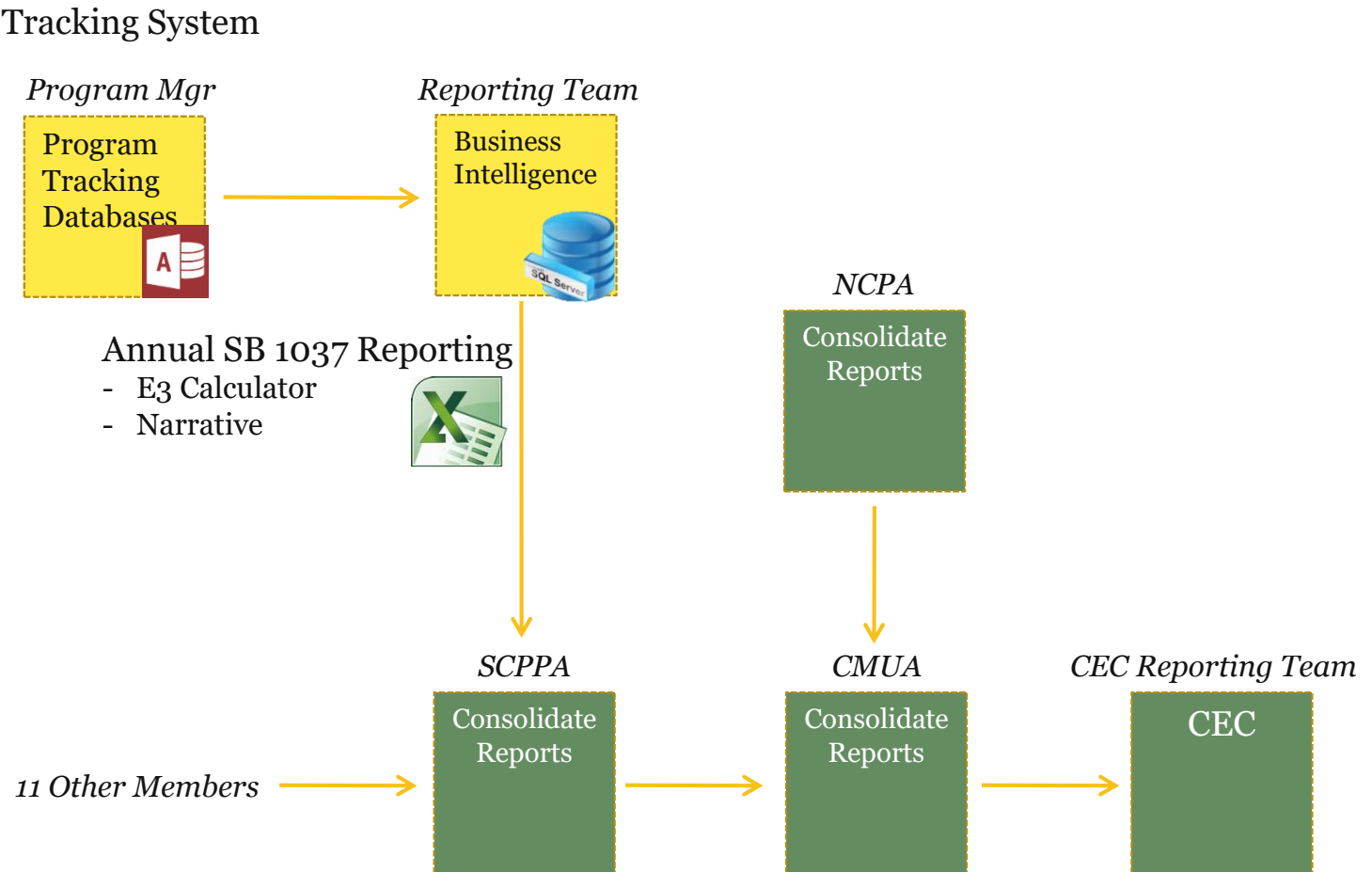
CMUA

Consolidate
Reports

CEC Reporting Team

CEC

11 Other Members



SMUD Process Flow

14

Reporting

Tracking System

Program Mgr

Customer
360
System

Planning Team

Customer
360
System

Annual SB 1037 Reporting

- E3 Calculator
- Narrative



SCCPA

Consolidate
Reports

NCPA

Consolidate
Reports

CMUA

Consolidate
Reports

CEC Reporting Team

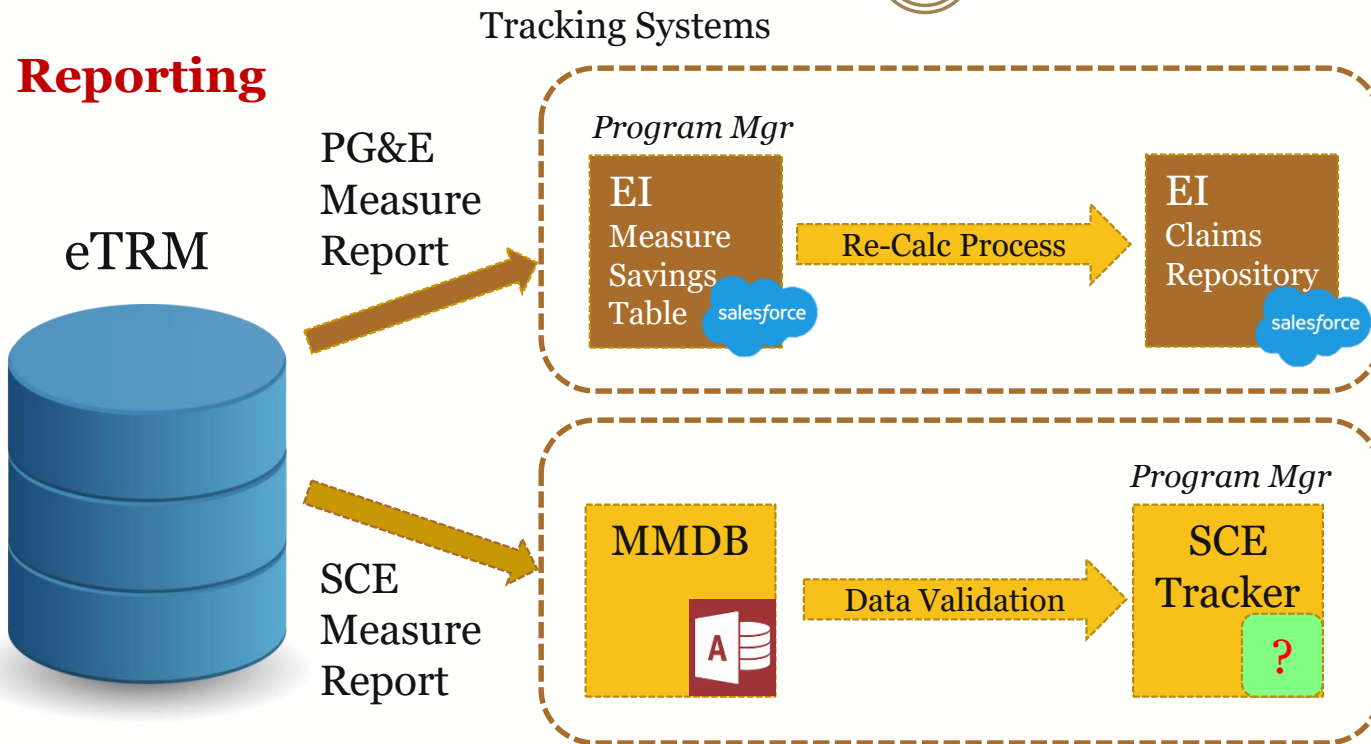
CEC

13 Other Members



eTRM Process Flow

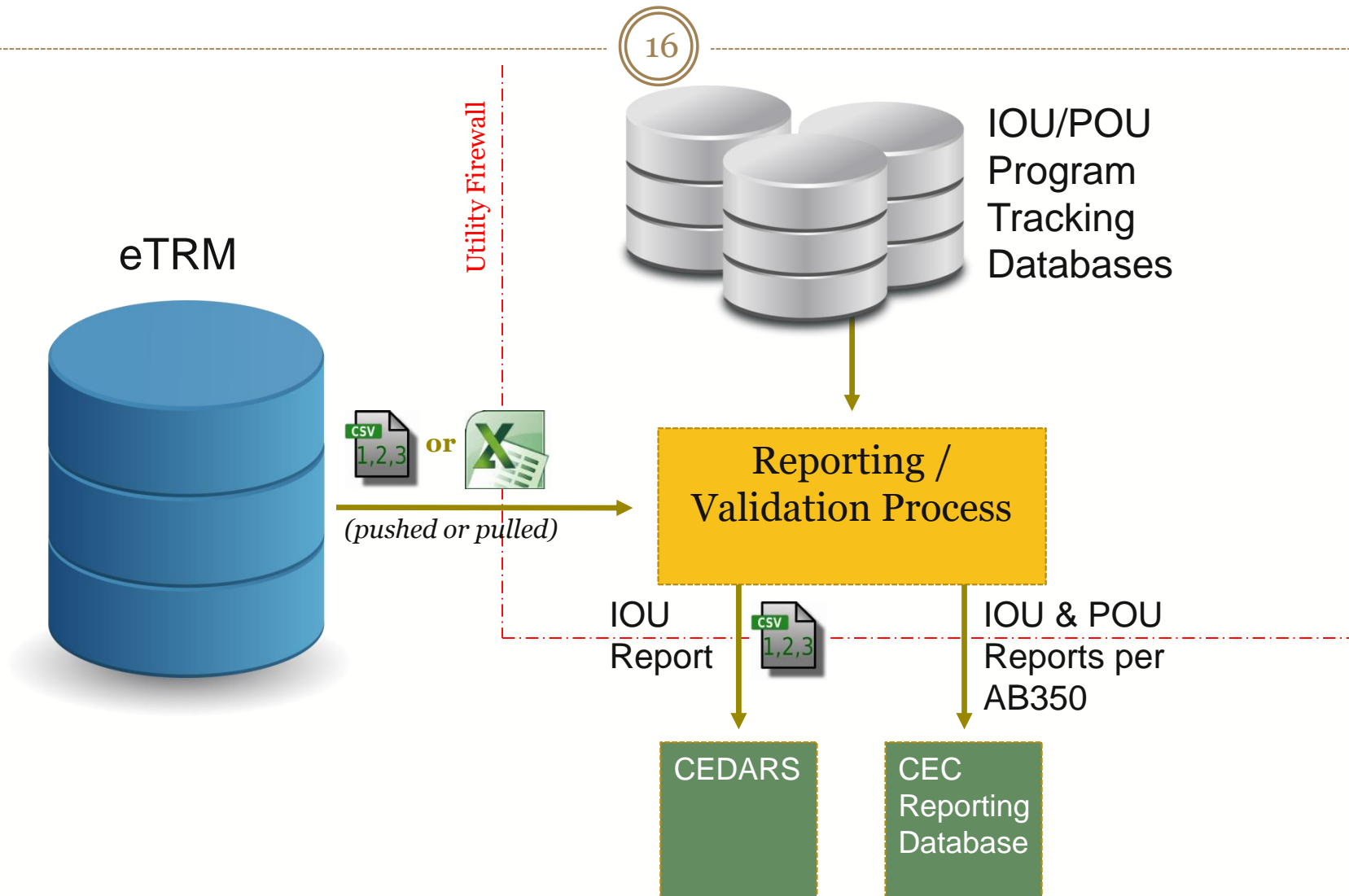
15



"Generic" Data Flow in eTRM Ecosystem

Tracking and Reporting

16



eTRM: Why Will It Be Better?

18

- Streamlined inputs
 - 123 fields to about 63 fields
- Reduced number of databases to manage
 - eTRM meant to replace READi, PEAR, DEER, CA TRM
 - eTRM can replace WPD, WCT, MMDB
- Reduced number of Measures through the consolidation process
 - Currently, 429 workpapers uploaded to www.deeresources.net
 - Expect about 170 measure records
- Automates features that (some) utilities are performing manually

Questions

19