

Proposals to Improve Reporting, CEDARS, CET and eTRM



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- **User interface and inputs** are very complicated and hard to learn and understand.
 - **More Transparency:** Equations and systems should be more transparent and as simple as possible.
 - **Consistency of Inputs:** Inputs should be commonly available and named across CEDARS and eTRM datasets.
- **Excessive inputs and ad-hoc system changes create extra work** for implementers and Portfolio Administrators.
 - **Value vs. Cost of Additional Data Requirements:** We should thoughtfully consider what value we are getting out of data against the cost to capture it.

- **Data validations cause** significant internal labor to manage claims processes and should be thoughtfully implemented, including citing the source of the validation requirements.
- **User system update impacts**
 - **Consider Downstream System Impacts:** often don't properly consider downstream impacts and scheduling to PA and Implementer systems and processes.

In Flight Changes: Reporting, CEDARS & CET

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- **A foundational recommendation** is the development of a more formal governance structure.
- **CPUC Decision D.23-02-002** directed the IOUs to take over funding for CEDARS and related tools, hire a facilitator, and create governance documents. SCE is the lead PA on the on-going solicitation.
- **Commission staff** will work with members of the Reporting Project Coordination Group (PCG) to develop the governance document, annual development plan, evaluate emerging tools, and other governance activity required to maintain and enhance CEDARS.
- **All Portfolio Administrators** shall be members of the Reporting Project Coordination Group

Current State: eTRM Commentary

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- **The eTRM is a vast improvement** over the old DEER system.
- **There is opportunity to simplify eTRM further**
 - Simplify Data Parsing: Make it easier to parse through data – building type, climate zone, etc.
 - Collapse Permutations: Collapse Permutations that are only a few % different.
- **eTRM enhancements to integrate evaluation findings** could be key to providing important feedback on what is and isn't working.
- **Loadshapes are becoming increasingly important** as PAs shift to total system benefit (TSB) goals. Many deemed measures don't have correct loadshapes and PAs need more flexibility to use appropriate loadshapes in our reporting for custom measures and NMEC projects.

Proposed Data Principles

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- **Transparency**
 - No black boxes
 - Well-documented code & data sources
 - Updated user guide and administrator manuals for all systems
- **Stakeholder Engagement**
 - Broad-based user input before changes to data requirements or models – understand impact of changes before making them.
- **Purpose Specification**
 - Purpose of data and definition of each data element
- **Data Minimization**
 - Making sure only ask for what you need, and that data is “used and useful”
- **Consistency across Systems**
 - Data should have same name and allowable values in all parts of system
- **Data Quality and Integrity**
 - Minimizing manual manipulations that is needed from system to system
- **Security**
 - The right people have access to the right data

Sub-Groups

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- **Break into sub-groups and discuss the following:**
 1. What changes and additions would you recommend making to the proposed data principles?
 2. What are key improvements that need to be included in the revised reporting PCG planning, enhancement, and maintenance processes?
 3. What specific changes to the current CEDARS, CET, or eTRM interface or system would make them simpler to use and easier to understand?

Sub-Groups

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- **Break into sub-groups and discuss the following:**
 1. How can we properly evaluate the costs & benefits of changes to these systems, and the impacts to downstream PA and implementer systems?
 2. What connectivity between the PA/Implementer systems, CEDARS, CET, or eTRM systems would make your life easier?
 3. What is the best way to unmask the “black box” that can make calculations in the CET more transparent?
 4. What questions should we be asking we are not asking?