

SCE's Rule 24/DRAM DRP/Aggregator Informational Overview

JUNE 8, 2018



Table of Content: SCE's Rule 24/DRAM

Objectives

Rule 24 Overview

Rule 24 SCE Processes

1. Demand Response Provider (DRP) Registration

2a. Click-Through Registration & Data Authorization

ESPI Data Fulfillment

2.b. Paper CISR-DRP Data Authorization

CISR-DRP Data Fulfillment and Data Dictionary

Customer Registration

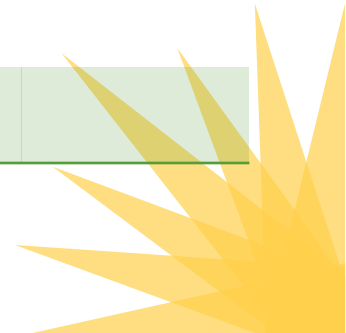
3. Customer Migration

4. CAISO/Rule 24 Systems

Rule 24 Enhancements & Initiatives

DRAM Overview & Contract Management

Appendices (Contact Information, Useful Links, RA Compliance, Supply Plan deadlines)



Objective:

Objective of this presentation is to help Participants understand:

- What is needed in order to register with SCE as a DRP under Rule 24
- The requirements of SCE's Click-Through and paper CISR-DRP processes
- The information provided in the Click-Through and paper CISR-DRP fulfillment reports
- The terms and obligations for DRAM performance requirements



Rule 24 Overview and Processes



SCE Rule 24 Overview

Background

On April 8, 2014, the CPUC approved SCE Advice Letter 3005-3, Direct Participation in Demand Response (DR), which allows an SCE customer to enroll with a non-utility Demand Response Provider (DRP) rather than participate in DR exclusively through an SCE-managed program. An SCE customer enrolled with a third party DRP will receive load reduction dispatch instructions and compensation only from the DRP, who participates directly in the CAISO market without an IOU role.

Major Processes

1. DRP Registration

Demand Response Provider (DRP) registration and account management

2.a. Click-Through

Electronic CISR-DRP requests and data fulfillment with Click-Through

2.b. Paper CISR-DRP

Operational processes to accept Paper CISR-DRPs and provide fulfillment reports to the DRP via SharePoint

3. Customer Migration

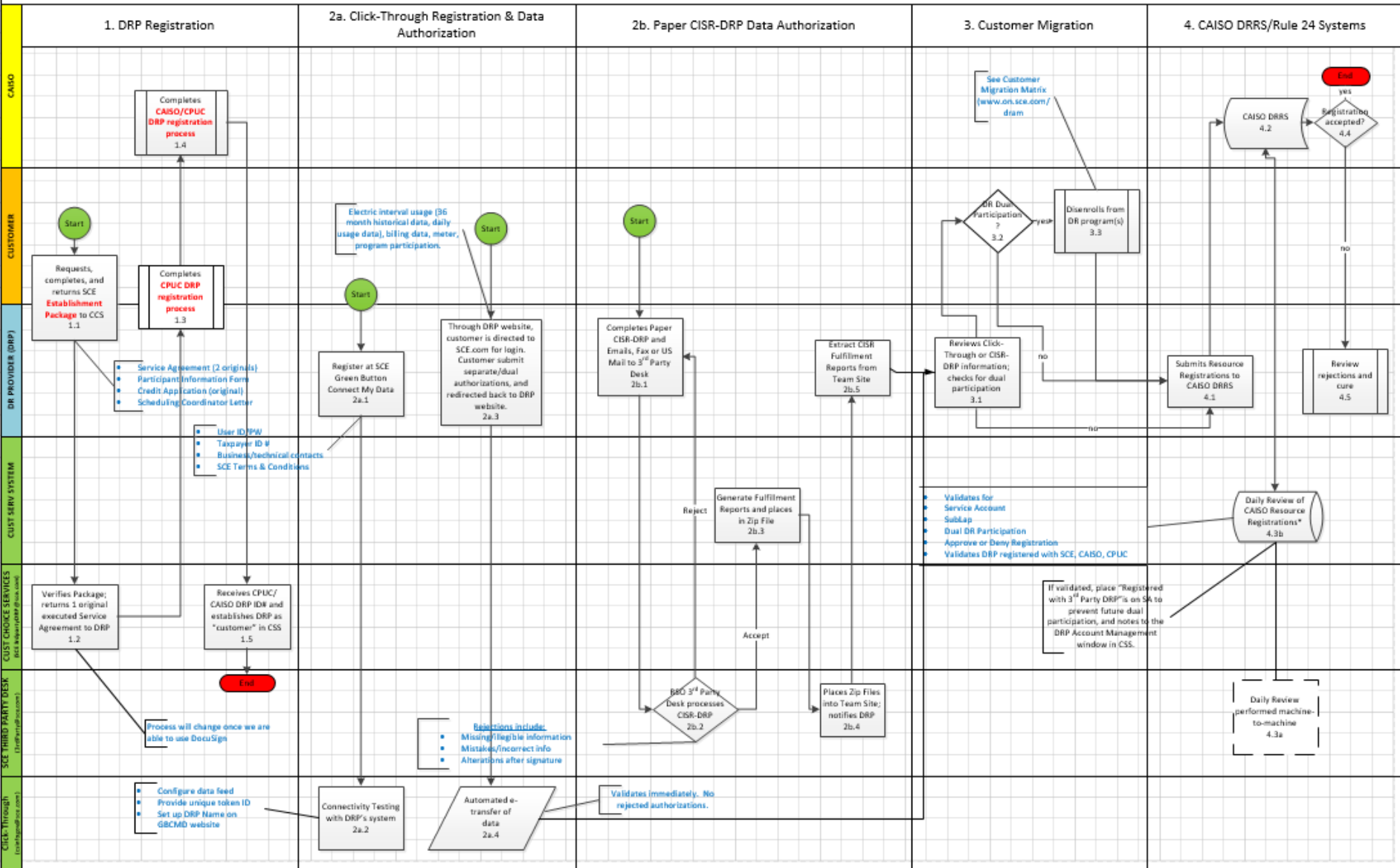
Disenrollment of customers from SCE demand response programs (dual participation prevention)

4. CAISO /Rule 24 System Processes

- CAISO Resource Registration (non-SCE process)
- SCE CAISO Daily Review of Registrations in Pending Status



RULE 24 OVERVIEW – SCE PROCESSES (LEVEL 1)

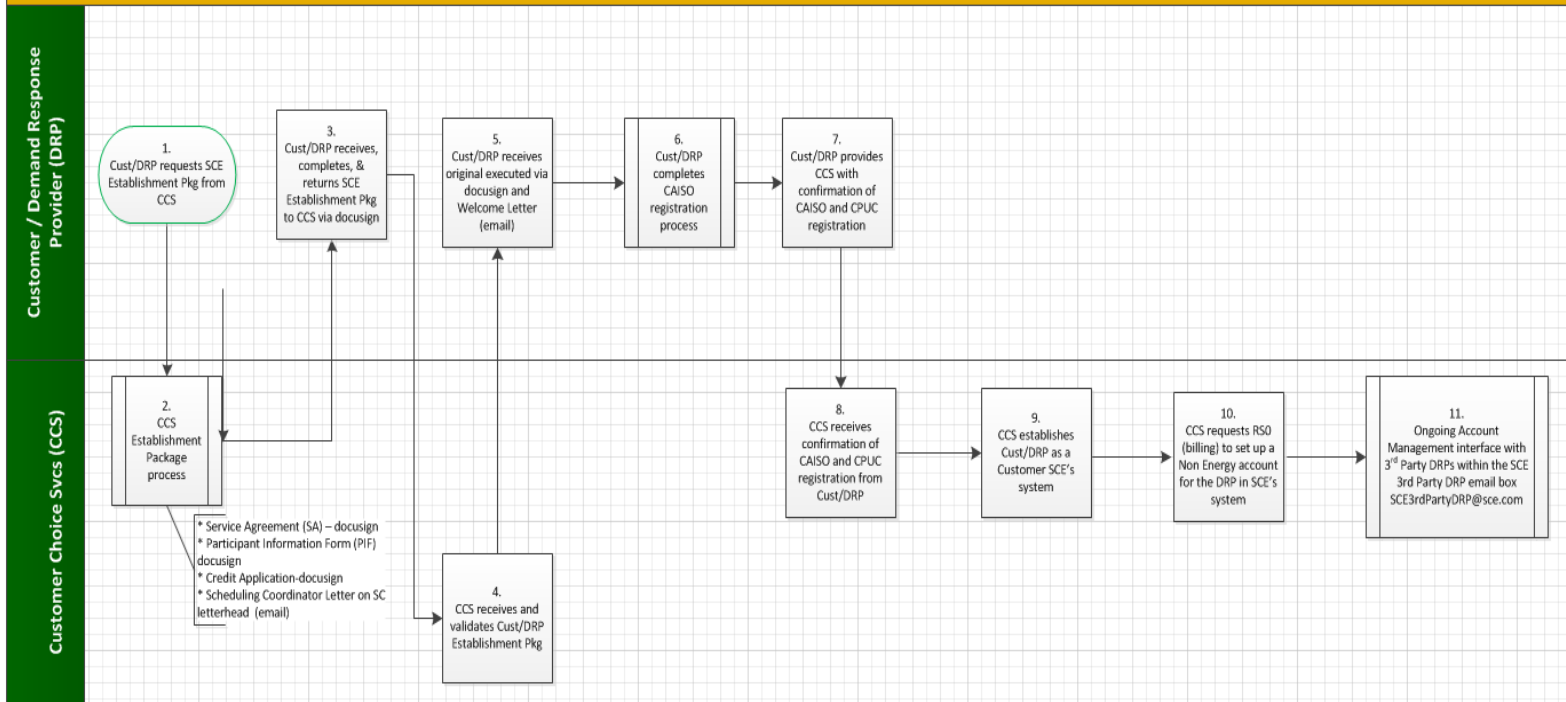


1 - DRP REGISTRATION



Establishment of 3rd Party as a DRP

3rd Party Demand Response Provider (DRP) SCE Establishment and CAISO/CPUC Registration (FINAL)



SCE DRP Setup Requirements

- ❑ Complete Establishment Package. SCE uses DocuSign to make the forms fillable and coordinate signature execution between parties.

The Establishment Package includes:

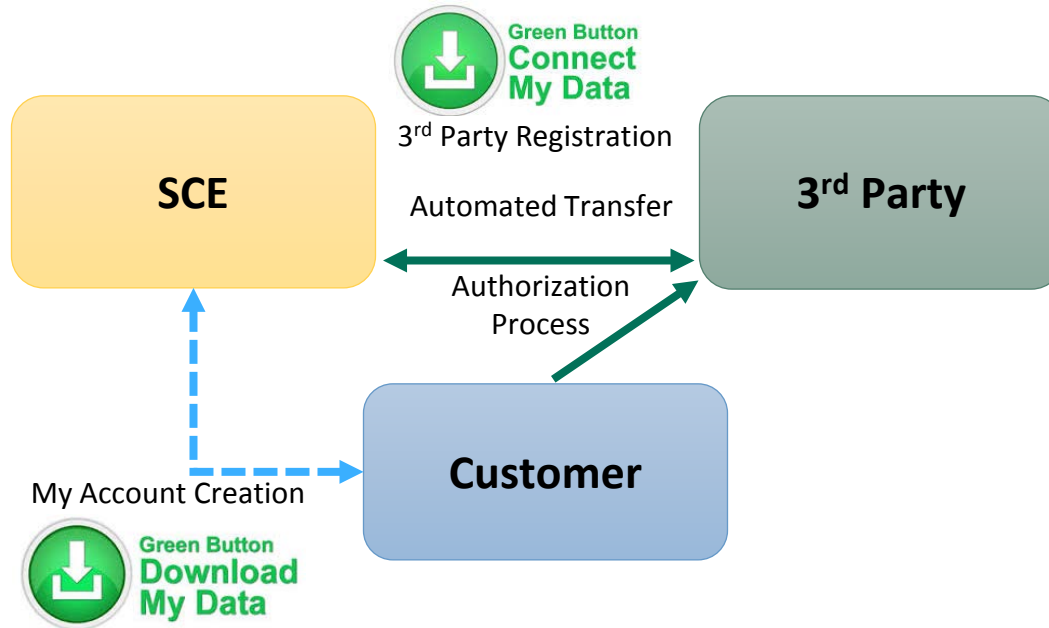
- The Participant Information Form
 - contains specific information about the DRP and is required when the DRP conducts business in the SCE service territory.
 - The Demand Response Provider (DRP) Service Agreement (Form 14-942)
 - The foundation of the legal relationship between a third party DRP and SCE incorporating the CPUC's FERC Order 745 tariff.
 - The Credit Form
 - Provides SCE with basic information needed to allow the DRP to establish credit with SCE. The Credit Identifier Application is required prior to a third party DRP being able to operate in the SCE service territory.
 - Scheduling Coordinator Letter (not included in DocuSign)
 - Letter is required from the Scheduling Coordinator (SC), on its letter head containing the name of the third party DRP that the SC will be doing business with, a description of the service the SC will be providing, and the date service to the third party DRP will commence.
- ❑ Please contact SCE3rdParty@sce.com to send the Establishment Package via DocuSign

SCE DRP Setup Requirements (cont)

- ❑ SCE's RSO Risk Management
 - Will evaluate the DRP for credit worthiness,
 - Determine a deposit amount (if needed),
- ❑ DRP will then register with the CPUC and CAISO.
 - CPUC generates a registration number and emails CCS's Account Manager with date and registration# for CCS's records.
 - CPUC adds the DRP to the CPUC website.
 - The DRP contacts CCS after approval by both the CPUC and CAISO
 - Provide documentation of CPUC and CAISO registration details (CAISO DRP short name and CPUC Registration ID)
- ❑ CCS will set up DRP as a Customer in CSS and contact RSO to set up in CSS the DRP's non energy bill (NEB)
- ❑ Enrollment/Establishment forms will be available via email upon request from SCE3rdPartyDRP@sce.com.
- ❑ The DRP can also visit <https://www.sce.com/wps/portal/home/partners/partnerships/Demand-Response-Service/>

2.a – Click-Through (Online) Data Authorization

Click-Through



Customers Start and End on a 3rd Party DRP web-site. SCE's system will authenticate a customer, allow for customer authorization, and redirect the customer back to the 3rd Party site.

Two screen and four click online customer authorization process. Also, customers can authorize up to two DRPs in one data authorization.

Click Through offers expanded data for registered DRPs. This data offers 36-months historical data, additional billing components, and additional customer information.

ESPI National Standard – Data transfers

- SCE's Click-Through adapted the standard used by SCE's Green Button Connect My Data for data sharing with DRPs.
- SCE's Green Button Connect My Data is based on the Energy Services Provider Interface (ESPI) data, which is a national standard released by the North American Energy Standards Board (NAESB) in the fall of 2011.

The ESPI standard:

- Ensures interoperability and consistency in the data provided to third parties by utilities
- Creates a standardized process and interface for the exchange of a customer's energy usage information between utilities and an authorized third party service provider.
- Provides the technical framework for delivering functionality around customer authorization and third party access to retail consumer's usage information.

DRP Registering for Green Button Connect My Data

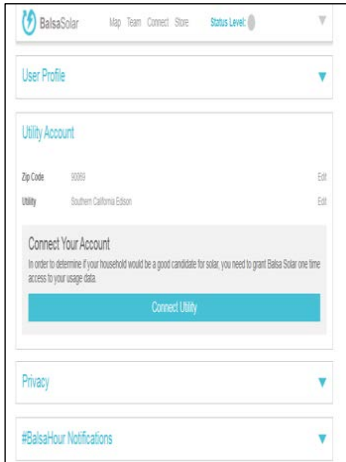
- DRP Parties can register at [SCE Green Button Connect My Data](#)
 - **User ID & Password:** a Third Party User ID and password will need to be created. The User ID will be an email address - if there is more than one person who will need access to your Third Party profile, use an email address that is both shared and checked frequently and a password that can be shared. Also, be sure that the email address you plan to use for your third party user ID isn't one that's been previously registered as an SCE.com user ID.
 - **Taxpayer Identification Number (TIN):** Required to complete registration.
 - **SCE's Terms & Conditions:** Agree to SCE's Terms & Conditions for the use of SCE customers' data.
 - **Connectivity Test:** After completing your online registration, a connectivity test, which tests the connection between your computer system and ours, must be performed. Please provide a contact who is familiar with the computer systems in your organization.



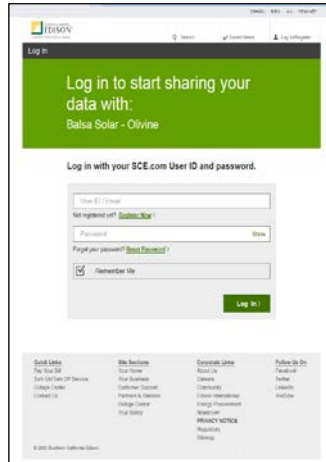
Before registering, we highly recommend you review the resources available at www.greenbuttondata.org

Click-Through Customer Experience

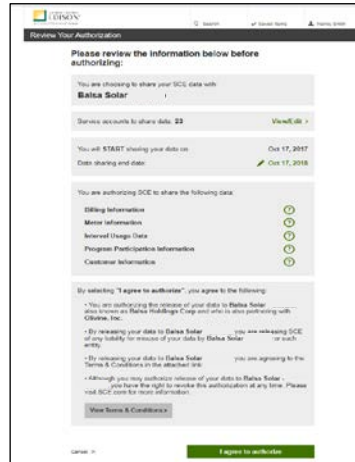
DRP website
(1 Click)



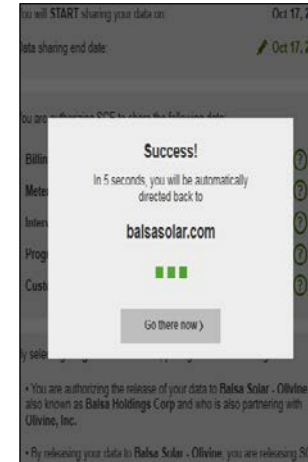
My Account Home Page
(1 Click)



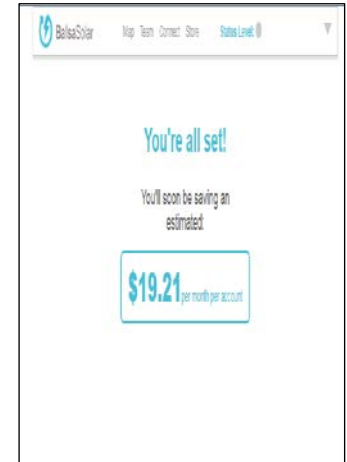
Authorization Page
(1 Click)



Redirect Pop-Up
(zero Click)



DRP website
(zero clicks)



3rd Party DRP Obtaining Data

□ Customer Authorization

- Log into their account at DRP site
 - DRP provides the Data Types and Duration requirements in the API.
- Redirected to SCE's MyAccount Page – login
- Authorization Page: When the third-party identifies themselves as a “DRP”, the customer will not be able to edit the data categories pre-selected by the DRP. The customer can only edit the amount of service accounts, and the date duration to a greater end date, if the DRP did not pre-select indefinite as the end date.
- Authorization completed and redirected back to DRP site.
- OAuth 2.0 is implemented for customer to 3rd party authorization.

• Data Fulfillment

- Summary data is shared within 90-sec of customer authorization using API calls.
- Data Exchange: Restful APIs are utilized for exchange of data.
- Data Format: ESPI Standard - XML data files are exchanged.
- Up to 36-month of historical interval data, ongoing electric meter data, current SCE demand response programs, and customer account information
- All smart meters capable of capturing interval reads are supported.



Report Fulfillment

XML files will be generated at Third Party level. Files will be logically split into multiple parts based on certain number of SAs (about 300 – 400 MB limit)

- Naming Convention for the XML files as follows
 - <TP_ID>_RCUST_<DATE>_<TIME>_<SEQUENCE NO>.XML – Retail Customer File
 - <TP_ID>_RAW_<DATE>_<TIME>_<SEQUENCE NO>.XML – Unbilled Interval Usage File
 - <TP_ID>_REVQ_<DATE>_<TIME>_<SEQUENCE NO>.XML – Revenue Quality Usage and Billing data file
- Usage, Billing, Meter, Program and Customer Information reports are sent within 1-2 business days which includes 36 months of history data one-time, once the DRP makes the API call.
- Report containing Revenue Quality interval usage data and billing data sent monthly, aligned to the customer's bill read cycle.
- Unbilled usage data shared daily.



2.b - CISR-DRP (Paper) Data Authorization

Intent of 3-Party CISR-DRP Authorization Can Be Achieved by Customer Using SCE's Click-Through

- ❑ Customer can utilize Click-Through to authorize one or two 3rd Parties by performing one authorization.
- ❑ Authorizations are quick, easy, and validated immediately. There are no rejected authorizations.
- ❑ If customer revokes authorization for one 3rd Party on a dual authorization, it will revoke authorization for the other.
- ❑ DRP receives data through a trusted authenticated, established process.



Paper CISR-DRP Processing

- ❑ SCE receives paper CISR forms via email, fax, or US Mail. Email is the preferred method.
- ❑ CISRs are worked in the order they are received.
 - SCE works to manage any CISR backlog to begin processing within 10 days of receipt. However during very busy times, it can take more than 10 days to work through the backlog.
 - Once processing begins, CISR-DRPs take approximately 3 days to review, approve, and begin delivering data reports. DRPs are notified of rejected CISRs the same day processing begins.
- ❑ Historically, SCE experiences a 50% CISR rejection rate due to illegible, incomplete, or inaccurately completed CISR form.
- ❑ Rejected CISR-DRPs will be returned to DRP to have customer complete new form. When SCE receives new form, it will be queued into backlog for processing.

Paper CISR-DRP Processing

Review of the CISR-DRP Form 14-941

- The CISR-DRP form is a legally binding contract, and as such, requires stringent RSO Third Party Desk review for completeness, accuracy of information, and having no alterations.
 - Completeness means there is no missing or illegible information (e.g., missing signature, title of signer).
 - Accuracy means that the data provided matches SCE's records. (e.g., incorrect person signed the form, incorrect service account, incorrect address)
 - The RSO 3rd Party Desk analyst must use their judgement in many cases to determine the accuracy of some information (i.e. mismatch due to format of name or format of street address).
 - Alterations means changes to the document after the customer or their authorized representative has signed it.



Any of the above can be a reason for rejecting the form.

Paper CISR-DRP Processing

- All customer fields are mandatory.
- DRP(s) must complete all fields, with the exception of providing either their Fed Tax ID or Rule 24 ID.

I, (Customer),

Customer Name According To SCE Records			
Contact Name (if different from above)	First Name	Last Name	
E-Mail Address	Phone Number		

(You are required to provide at least your e-mail or phone number.)

Do hereby AUTHORIZE (Sign Section D) REVOKE (*check only one*) the following DRP(s) (Sign Section H):

Name of Primary DRP		Fed Tax ID		Rule 24 ID	
Email Address				Phone Number	

(Complete the following table only if you are authorizing data to be released to a collaborating DRP)

Name of Secondary DRP		Fed Tax ID		Rule 24 ID	
Email Address				Phone Number	



Paper CISR-DRP Processing

- ❑ SCE will accept an excel spreadsheet listing service accounts, service address, and service city


access to the following electric Service Accounts:

SERVICE ADDRESS	SERVICE CITY	SERVICE ACCOUNT NUMBER

(You can include additional service accounts by attaching a list to this form.)



SCE Customer Bill Example



**SOUTHERN CALIFORNIA
EDISON**
An EDISON INTERNATIONAL Company

P.O. Box 600
Rosemead, CA
91771-0001
www.sce.com

Your electricity bill

VALUED CUSTOMER / Page 1 of 6

For billing and service inquiries call 1-800-684-8123

Date bill prepared: Mmm dd 'yy

Customer account 0-00-000-0000

Service account 0-000-0000-00

54321 STREET ADDRESS
MONTEREY PARK, CA 91755

Rotating outage Group A123

Your account summary

Previous balance	\$329.99
Payment received Mmm dd 'yy	-\$329.99
<hr/>	
Balance forward	\$0.00
Your new charges	\$328.72
<hr/>	
\$ Total amount you owe by Mmm dd 'yy	\$328.72

Service account number

Service account address

Compare the electricity you are using

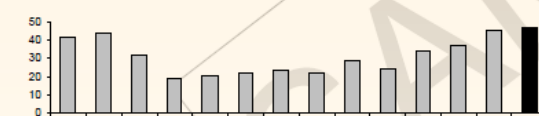
For meter 222999-999999 from Mmm dd 'yy to Mmm dd 'yy

Total electricity you used this month in kWh **1,500**

Your next billing cycle will end on or about Mmm dd 'yy.

Your daily average electricity usage (kWh)

2 years ago: 41.94 Last year: 44.35 This year: 46.88



Your monthly usage may be higher than usual...

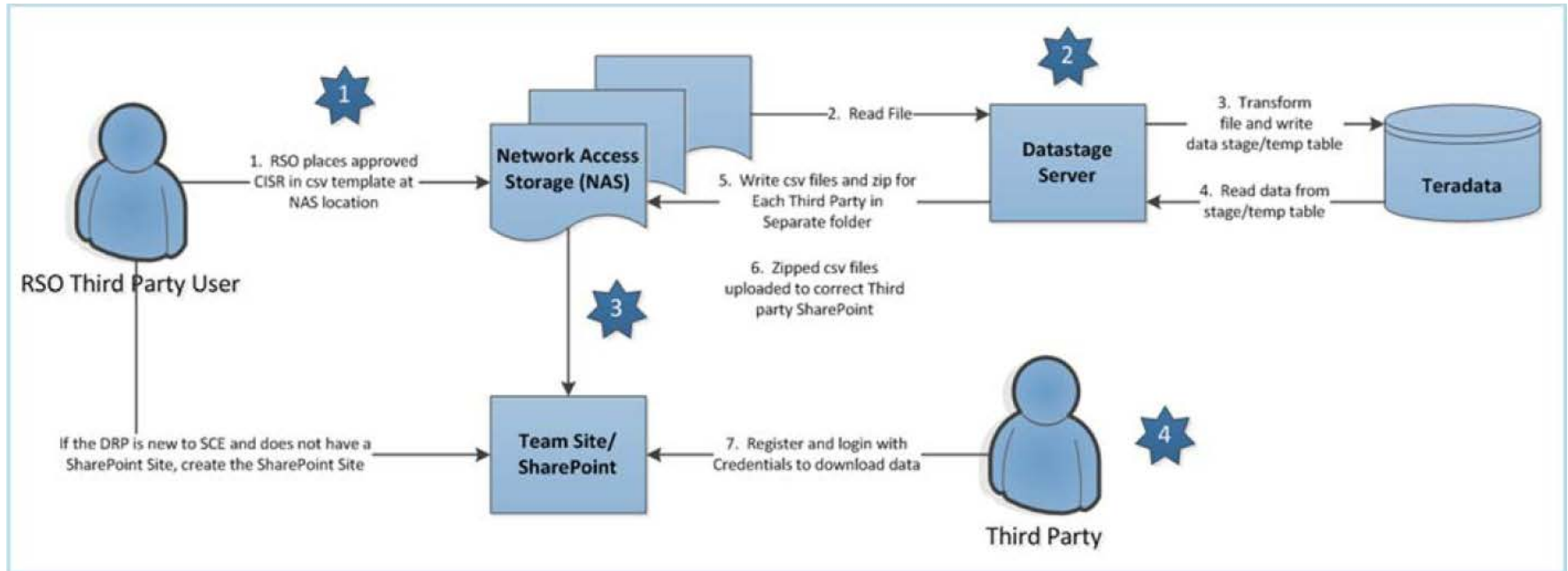
Based on your historical usage pattern, your monthly usage is trending higher than normal. As a result, you may notice an increase in your bill. If you would like information on tips and programs that can help you lower your energy usage and your bill, please visit www.sce.com/tips.

Paper CISR-DRP Processing

Accepting and Rejecting CISR-DRP Form 14-941

- ❑ When a CISR is received, RSO 3rd Party Desk logs CISR into its CISR Database.
- ❑ RSO 3rd Party Desk Analyst performs a careful review of the CISR data and either accepts or rejects the CISR-DRP form.
 - ✓ **Accepted**
 - If the RSO 3rd Party Desk Analyst has determined that the information on the CISR-DRP form is complete, accurate, and lacking alterations, then the CISR-DRP is approved.
 - The approved CISR-DRP is then transferred to IT to begin data fulfillment.
 - ✓ **Rejected**
 - RSO 3rd Party Desk Analyst has determined that the data elements do not match SCE system of record or form is missing critical information to identify whether the customer authorized the release of their information
 - RSO Third Party Desk will send an email to the DRP providing information on why the form was rejected and how to resolve.

Paper CISR-DRP Fulfillment Reports



- Paper CISR-DRP fulfillment reports will be available on SharePoint team site **for 5 days**.
- When the initial reports are available on that site for a DRP, RSO 3rd Party Desk will send an email to the DRP with a link and specific instructions on how to access Team Site.
- Reports are generated in a CSV file format.



Because of data storage limitations, reports will be available 5 calendar days per SCE policy. After 5 calendar days, all reports will be removed and will be no longer available to the 3rd Party.

Paper CISR-DRP Data Fulfillment & Data Dictionary

WENDY HOUSER



Paper CISR-DRP Reports (6)

Report	Report Name	Description	Frequency
Program Participation Report	Participation.csv	Service account's DR Program participation	Once, upon approval of Paper CISR-DRP
Meter Report	Meter.csv	Service account's meter information.	Once, upon approval of Paper CISR-DRP
Billing Information Report	Billing.csv	Service account's billing information including billing determinants and charges. Contains SubLAP and Pnode data.	Initially, upon approval of Paper CISR-DRP then monthly after bill period ends.
Customer Information Report	Customer.csv	Service account's customer address, LSE, MDMA, MSP.	Once, upon approval of Paper CISR-DRP
Interval Report (Interval.csv)	Interval.csv		Initially, up to 36-months historical, then daily.
RQMD Interval Report	RQMD_Intrvl_Report	RQMD interval data for the bill period.	Generated after bill period ends.

Paper CISR-DRP Reports – Prog Participation

Program Participation Report (Participation.csv)

- If the SA is not on a DR Program, no Program Participation report will be generated

BATCH_ID	CISR_Id	Serv_Acct_Id	Tp_Name	OfIn_TP_Domain	Comn_Featr_Name	Featr_Strt_Dttm	Featr_End_Dttm	Cpp_Ind	Capacity_Reservation_Lvl_Ind	Program_Commitment_Dt	Insrt_Sys_Dttm	Last_Updt_Sys_Dttm	Last_Actn_Cd
20180300000000	0	123456	Energy Test	EnergyTest	PTR	5/1/2014	12/31/9999	N	N	5/4/2014	3/17/2016 0:00	1/0/1900 0:24	I

BATCH_ID

OFLN_CISR_Id

Serv_Acct_Id

OFLN_TP_NAME

Comn_Featr_Name

Featr_Strt_Dttm

Featr_End_Dttm

Cpp_Ind

Capacity_Reservation_Lvl_Ind

Program_Commitment_dt

Insrt_Sys_Dttm

Last_Updt_Sys_Dttm

Last_Actn_Cd



Paper CISR-DRP Reports – Meter & Cust Info

Meter and Customer Report (meter_cust.csv)

BATCH_ID	CISR_Id	Service_Account_ID	OFLN_THIRDPARTY_NA	OFLN_TP_DOMA	COMP_DOMAIN_FL	Customer_Account_Party_Name	Class_Indicator	SA_Premises_ID	SA_Street_Addr	SA_City	SA_State_Coc	SA_Zip_Plus	Load_Serving_Entity	MDMA_Ticker_MSP_Ticker_I
2.02E+13	123456	265498	Energy Test	Energy Test	Y	321654001 LOS ANGELES ABC	O	10139833	11111 HORSESHOE	Canyon	CA	91100	LOS ANGELES COMMUNITY CHC SCE	SCE

Meter_Id	Meter_Identification_Num	Make	Mfctr_Dev_Typ_CD	Voltage_Meas	Phase_Cd	Wire_Cd	Configuration_Txt	Mtr_Frm_Typ_Cd	Ratio_Num_Val	Ratio_Den_Val	Cycles_Qty	Multiplier	Insrt_Sys_Dttm	Last_Updt_Sys_Dttm	Last_Actn_Cd
14610229	2.16.840.1.114416.15.259000078487	ITRON (SCHLUMBERGER; SANGAMO)	CP15DA	480	3	4	3 PHASE - 277480V - 4W	95					58:22.4	58:22.4	I

BATCH_ID	Mtr_Id
OFLN_CISR_Id	Mtr_Id_Num
Serv_Acct_Id	Mfctr_Name
OFLN_TP_NAME	Mfctr_Dev_Typ_CD
Customer_Acct_Id	Voltage_Meas
Party_Name	Ratio_Num_Val
Class_Indicator	Ratio_Den_Val
SA_Premises_ID	Cycles_Qty
SA_Street_Addr	Multiplier
SA_City	Insrt_Sys_Dttm
SA_State_Cd	Last_Updt_Sys_Dttm
SA_ZipPlus4	Last_Actn_Cd
LSE	
MDMA_Ticker_Id	
MSP_Ticker_Id	



Paper CISR-DRP Reports – Billing Info

Billing Information Report (billing.csv)

BATCH_ID	OFLN_CISR_Id	Serv_Acct_Id	OFLN_TP_NAME	OFLN_TP_DOMAIN	Serv_Acct Stmt_Id	PNode_Num	Sublap_Cd
2.02E+13	ABC	ABC123	Energy Test	EnergyTest	213	LITEHIPE_6_N008	SCEW

Elec_Mo_Rate_ScheduleID	Rotating_Outg_Grp	BillPer_Strt_Dt	BillPer_End_Dt	Elec_Mo_Bill_Days	Billg_Cyc_Id
DOMESTIC	A065	2/10/2016	3/11/2016	29	57

Charge_Note	ISVC	Billed_Amnt	Mnthly_Cnsum	Volt_Meas	Cost	Usage	Chrg_Factor
Tier 4 (101% to 200%) Delivery Charge	4251234	103.6	708	240	51.44	480	0.107166667

Franch_Fee	Local_Capacity_Area	insrt_sys_dttm	last_updt_sys_dttm	last_actn_cd
1.25	LA Basin	2/10/2016 0:18	2/10/2016 0:18	I



Paper CISR-DRP Reports – Billing Info (cont)

Billing Information Report (billing.csv)

BATCH_ID	State_Tax	Cost
OFLN_CISR_Id	Wntr_Mid_Peak_Gen_Chrg	Usage
Serv_Acct_Id	Wntr_Off_Peak_Gen_Chrg	Chrg_Factor
OFLN_TP_NAME	Wntr_Super_Off_Peak_Gen_Chrg	Franch_Fee
Serv_Acct_Stmt_Id	Sumr_Mid_Peak_Gen_Chrg	Local_Capacity_Area
PNode_Num	Sumr_Off_Peak_Gen_Chrg	Insrt_Sys_Dttm
Sublap_Cd	Sumr_Super_Off_Peak_Gen_Chrg	Last_Updt_Sys_Dttm
Elec_Mo_Rate_ScheduleID	Sumr_On_Peak_Gen_Chrg	Last_Actn_Cd
Rotating_Outg_Grp	Wntr_Mid_Peak_Dmnd	
Bill_Per_Strt_Dt	Wntr_Off_Peak_Dmnd	
Bill_Per_End_Dt	Sumr_Mid_Peak_Dmnd	
Elec_Mo_Bill_Days	Sumr_Off_Peak_Dmnd	
Billg_Cyc_Id	Sumr_On_Peak_Dmnd	
Fac_Dmnd_Del_Chrg	Wntr_Mid_Peak_Dmnd_Chrg	
Wntr_Mid_Peak_Del_Chrg	Wntr_Off_Peak_Dmnd_Chrg	
Wntr_Off_Peak_Del_Chrg	Sumr_Mid_Peak_Dmnd_Chrg	
Wntr_Super_Off_Peak_Del_Chrg	Sumr_Off_Peak_Dmnd_Chrg	
Sumr_Mid_Peak_Del_Chrg	Sumr_On_Peak_Dmnd_Chrg	
Sumr_Off_Peak_Del_Chrg	Trans_Chrg	
Sumr_Super_Off_Peak_Del_Chrg	Distri_Chrg	
Sumr_On_Peak_Del_Chrg	Nucl_Decomm_Chrg	
DWR_Bond_Chrg	Pub_Purpose_Pgm_Chrg	
Cust_Chrg	ISVC	
Power_Fact_Adj	Billed_Amount	
DWR_Energy_Crdt	Mnthly_Cnsum	
UUT_Exmpt_Stat	Voltage_Meas	



Billing data is dynamic per Service Account. Red text represents billing options, and if applicable, may be listed per tier.

Paper CISR-DRP Reports – Interval Data

Interval Data Report (interval.csv)

BATCH_ID	OFLN_CISR_Id	Serv_Acct_Id	OFLN_TP_NAME	OFLN_TP_DOMAIN	Accum_Behaviour	Min_Interval_length	Start_Dttm	End_Dttm	ChannelNumber
2.02E+13	123456	30215632	Energy Test	EnergyTest	4	60	1/10/2018 0:00	1/10/2018 1:00	1101
2.02E+13	123456	30215632	Energy Test	EnergyTest	4	60	1/10/2018 1:00	1/10/2018 2:00	1101
Rdng_Value	Till_Date_Cost	BillConf_Ind	Curr_Bill_Period_Dur_Sec	Curr_Bill_Period_Start_Dt	Till_Date_Usge	Last_Bill_Stmt_Usage	Mtr_Rdng_Last_Upd_Dttm	costcalclastupdatedtimestamp	Interval_Status
500	95.63	N	2764800	2/8/2018 0:00	648980	612000	1/11/2018 4:18	3/12/2018 9:56	Actual
450	95.63	N	2764800	2/8/2018 0:00	648980	612000	1/11/2018 4:18	3/12/2018 9:56	Actual
Start_Dttm_Secs	End_Dttm_Secs	Rdng_Dttm	Usage_Date	UsageLastProcessed_Dttm	Last_Bill_Stmt_Cost	Insrt_Sys_Dttm	Last_Updt_Sys_Dttm	Last_Actn_Cd	
1515571200	1515574800	1/10/2018 9:00	1/10/2018 0:00	3/27/2015 0:00	90.73	3/30/2018 12:59	3/30/2018 12:59	I	
1515574800	1515578400	1/10/2018 10:00	1/10/2018 0:00	3/27/2015 0:00	90.73	3/30/2018 12:59	3/30/2018 12:59	I	

For these reports, the unit of measure for both the interval and RQMD data is “kWh”. However, as we have a standard usage sharing interface across 3rd parties for all programs, we are multiplying the data by 1000.

This was done to keep CISR-DRP data in alignment with other CISRs and 3rd party data sharing programs.



Recipients should divide the usage by 1000 for their use.

Paper CISR-DRP Reports – Interval Data (cont)

Interval Data Report (interval.csv)

BATCH_ID	Till_Date_Usge
OFLN_CISR_Id	Last_Bill_Stmt_Usage
Serv_Acct_Id	Mtr_Rdng_Last_Upd_Dttm
OFLN_TP_NAME	Cost_Calc_LastUpdated_Dttm
Accu_Behaviour	Interval_Status
Min_Interval_length	Start_Dttm_Secs
Start_Dttm	End_Dttm_Secs
End_Dttm	Rdng_Dttm
ChannelNumber	Usage_Date
Rdng_Value	UsageLastProcessed_Dttm
Till_Date_Cost	Last_Bill_Stmt_Cost
Bill_Conf_Ind	Insrt_Sys_Dttm
Curr_Bill_Period_Dur_Sec	Last_Updt_Sys_Dttm
Curr_Bill_Period_Start_Dt	Last_Actn_Cd



Paper CISR-DRP Reports - RQMD

RQMD Interval Report (RQMD_Intrvl_report.csv)

- Same columns as Interval Report.

BATCH_ID	OFLN_CISR_Id	Serv_Acct_Id	OFLN_TP_NAME	OFLN_TP_DOMAIN	Accum_Behaviour	Min_Interval_length	Start_Dttm	End_Dttm	ChannelNumber
2.02E+13	123456	30215632	Energy Test	EnergyTest	4	60	1/10/2018 0:00	1/10/2018 1:00	1101
2.02E+13	123456	30215632	Energy Test	EnergyTest	4	60	1/10/2018 1:00	1/10/2018 2:00	1101
Rdng_Value	Till_Date_Cost	BillConf_Ind	Curr_Bill_Period_Dur_Sec	Curr_Bill_Period_Start_Dt	Till_Date_Usge	Last_Bill_Stmt_Usage	Mtr_Rdng_Last_Upd_Dttm	costcalclastupdatedtimestamp	Interval_Status
500	95.63	Y	2764800	2/8/2018 0:00	648980	612000	1/11/2018 4:18	3/12/2018 9:56	Actual
450	95.63	Y	2764800	2/8/2018 0:00	648980	612000	1/11/2018 4:18	3/12/2018 9:56	Actual
Start_Dttm_Seconds	End_Dttm_Seconds	Rdng_Dttm	Usage_Date	UsageLastProcessed_Dttm	Last_Bill_Stmt_Cost	Insrt_Sys_Dttm	Last_Updt_Sys_Dttm	Last_Actn_Cd	
1515571200	1515574800	1/10/2018 9:00	1/10/2018 0:00	3/27/2015 0:00	90.73	3/30/2018 12:59	3/30/2018 12:59	I	
1515574800	1515578400	1/10/2018 10:00	1/10/2018 0:00	3/27/2015 0:00	90.73	3/30/2018 12:59	3/30/2018 12:59	I	

For these reports, the unit of measure for both the interval and RQMD data is “Kwh”. However, as we have a standard usage sharing interface across 3rd parties for all programs, we are multiplying the data by 1000.



Recipients should divide the usage by 1000 for their use.



Paper CISR-DRP Reports – RQMD (cont)

RQMD Interval Report (RQMD_Intrvl_report.csv)

- Same columns as Interval Report.

BATCH_ID	Till_Date_Usge
OFLN_CISR_Id	Last_Bill Stmt_Usage
Serv_Acct_Id	Mtr_Rdng_Last_Upd_Dttm
OFLN_TP_NAME	Cost_Calc_LastUpdated_Dttm
Accu_Behaviour	Interval_Status
Min_Interval_length	Start_Dttm_Secs
Start_Dttm	End_Dttm_Secs
End_Dttm	Rdng_Dttm
ChannelNumber	Usage_Date
Rdng_Value	UsageLastProcessed_Dttm
Till_Date_Cost	Last_Bill Stmt_Cost
Bill_Conf_Ind	Insrt_Sys_Dttm
Curr_Bill_Period_Dur_Sec	Last_Updt_Sys_Dttm
Curr_Bill_Period_Start_Dt	Last_Actn_Cd



Paper CISR-DRP Report Data Dictionary

Rule 24 CISR-DRP Data Dictionary is now available. Please go to <http://www.on.sce.com/DRAM>, under the heading “Reference Materials”

Rule 24 CISR-DRP Report Data Dictionary

Prepared for:
Non-Utility DRP



Prepared by:
Southern California Edison

Revision Date: 04/09/2018

3. Customer Migration

No Dual Participation

- A customer cannot participate in a SCE and a DRP DR Program, or with two different DRPs, at the same time.
- Customer must first dis-enroll from any SCE DR Program(s).
- Review the DRAM Customer Migration Matrix (www.on.sce.com/dram) for un-enrollment instructions by DR program.



*It is the Customer's responsibility to dis-enroll from a DR program.
Dis-enrollment criteria and times vary by program, so plan ahead!*



Rule 24 Upcoming Enhancements & Initiatives



4. CAISO / Rule 24 Systems

CAISO Resource Registrations:

- See “Useful Links – CAISO ” at the end of this presentation for information regarding CAISO Resource Registrations

SCE’s systems will perform daily validations, for example:

- Accuracy of information (e.g., active, closed, correct SA #)
- SubLAP information
- DR Dual Participation (including “3rd Party DRP”)

CAISO End Dated Locations:

- SCE receives CAISO notifications when Locations are End Dated for our team to process.



Rule 24 Upcoming Enhancements & Initiatives

Streamline the Online Customer Authorization Process

The Rule 24 Decision directs SCE to work with the Energy Division and 3rd Party DRPs to improve the GBC customer authorization process which includes connecting SCE systems (Green Button) with third party websites/systems, providing a “click-through process,” defined as a process by which to collect electronic signatures that begins and ends on third party’s website.

- Phase One of Solution 3 was implemented on April 2, 2018
- Phase Two of Solution 3 will implement on June 24, 2018
- Phase Three of Solution 3 will implement on November 26, 2018

Streamline the Paper Customer Authorization Process (PENDING)

The Optical Character Recognition (OCR) implementation will automate processing and validation of both paper (handwritten) and fillable PDF CISR-DRP forms.

- System will process CISR-DRPs authorizations or revocations received via US mail, fax, or email
- Enable SCE to reduce turn around time and processing time



Rule 24 Upcoming Enhancements & Initiatives (cont'd)

SCE Rule 24 Website updates (Pending)

- View the website at <https://www.sce.com/wps/portal/home/partners/partnerships/Demand-Response-Service>
 - Updates will reflect Click-Through Phase One changes to the online authorization process

Current Features

- The website provides Non-Utility DRP registration steps
- Approved processes to access customer data
- Customer FAQs
- Links to additional resources



Demand Response Auction Mechanism (DRAM) Contract Management

Rule 24 and DRAM

DRAM DRPs utilize the Rule 24 process. The DRAM is a multi-year pilot where Seller contracts with SCE through the solicitation process to sell DR capacity. The Seller is responsible for bidding the DR energy into the CAISO market. The fourth and final DRAM Pilot solicitation (for 2019 delivery) is now closed.

See www.on.sce.com/DRAM for additional information.



2019 DRAM RFO Pre-Bid Webinar Conference:

Thursday, February 1, 2018

[DRAM 4 Pre-Bid Webinar Conference Presentation \(PDF\)](#)

Reference Materials

- [2019 Demand Response Auction Mechanism Q&A](#)
- [CISR-DRP Form](#)
- [DRAM RFO Instructions](#)
- [DRAM Customer Migration Matrix](#)
- [Rule 24](#)
- [Rule 24 Workshop Presentation](#)
- [Scheduling Coordinator RFI Information Packet](#)
- [DRAM Purchase Agreement](#)

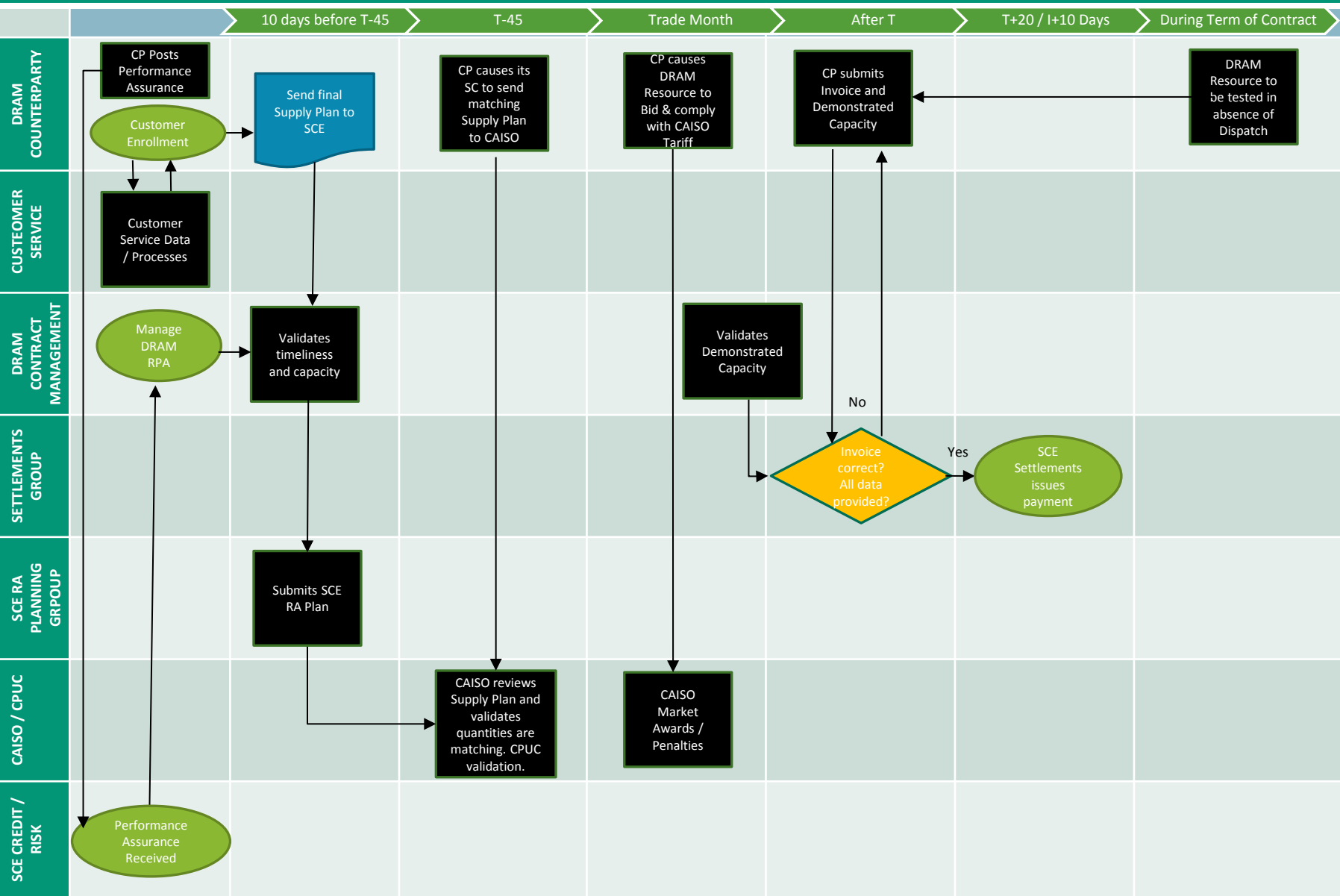
Local Capacity Area (LCA) Google Earth Maps (KMZ):

- [LA Basin](#)
- [Big Creek / Ventura](#)

Q&A Materials from previous DRAM RFOs:

- [2018 DRAM Bidder's Conference – Q & A](#)
- [2017 DRAM Bidder's Conference – Q & A](#)
- [2016 DRAM Bidder's Conference – Q & A](#)
- [2017 Demand Response Auction Mechanism – Q & A](#)
- [2016 Demand Response Auction Mechanism – Q & A](#)

DRAM Counterparty Monthly Process Flow Chart



DRAM – Execution of RPA

Counterparty (Seller) performance obligations begin immediately after execution of the Resource Purchase Agreement (RPA).

- Post Performance Assurance, if below required Credit Rating (Section 5.1 of the RPA)
 - Execution Date + 10 Business Days
 - Seller posts 20% of the sum of the estimated Delivered Capacity Payments
 - Cash or Letter of Credit (in the form of Exhibit B)



~ If posting is not received by the 10th Business Day after Execution, Seller is in Event of Default and SCE has right to terminate under the Agreement.
~ Delivered Capacity Payments include Scheduling Coordinator Fees.

DRAM – Seller Obligations

- Delivery of Product (Section 3.1 and Exhibit D of the RPA)
 - 10 Business Days prior to SCE's compliance deadlines with CAISO and CPUC submit Showing Month Supply Plan - Exhibit D to SCE
- Testing of Resource (Section 3.3 (b) and 3.3(c) of the RPA)
 - If DRAM Resource has not been tested or Dispatched, then Seller must cause a test in accordance with Appendix B of D.14-06-050
 - Perform load impact analysis
- Seller Obligations (Section 3.4 of the RPA)
 - Bid DRAM Resource into the CAISO Market
- Indemnities for Seller's Failure to Perform (Section 3.5 of the RPA)
 - Seller indemnifies Buyer from any costs, penalties, fines or charges assessed against Buyer by the CPUC or the CAISO, resulting from Seller's failure to provide product



Although the CAISO may allow for Supply Plan updates to increase capacity at T-11, the DRAM RPA contract does NOT – there is only one submittal deadline under the RPA.

DRAM – Settlements, Invoices, and Payments

Each invoice is submitted by Seller to Buyer on a monthly basis, shall include all of the following information:

- Invoice and Payment Process (Section 4.2 of the RPA)
 - Render invoice as soon as practicable after the end of the Showing Month (if any charges)
 - Counterparty company name, Tin#, address and contact information
 - SCE contact information:

Bill To:

Southern California Edison

Quad 1C Settlements

Attn: Betty Eastin

2244 Walnut Grove Ave

Rosemead, CA 91770

Email: PPFDPowerSettle@sce.com

SCE Settlements Contact Name:

Betty Eastin

Tel: (626)302- 3277

Email: Betty.Eastin@SCE.com

SCE Contract Contact Name:

Contract Manager Name

Telephone

Email

DRAM – Settlements, Invoices, and Payments (cont'd)

- Payment Due Date (later of the 20th day of each month, or 10th day after receipt of invoice and Demonstrated Capacity)
- Payments to be issued via electric funds transfer or other mutually agreed method (SCE prefers ACH)
- Bank details
- Total invoice amount



DRAM – Settlements, Invoices, and Payments (cont'd)

Each invoice submitted by Seller to Buyer on a monthly basis shall also include a statement, in the form of Exhibit C, of the amount Seller was capable of delivering (“Demonstrated Capacity”) and include the following:

- Demonstrated Capacity (Section 1.6 of the RPA)
 - Results of a capacity test or Average amount of capacity bid into the CAISO Markets or Results of a CAISO Dispatch
 - Residential Customer Product – indication of the number of Residential Customer SAID agreements and the number of Small Commercial SAID accounts in each PDR or RDRR
 - Demonstrated Capacity for Local Capacity – indication of the number of SAID agreements in the applicable LCA that are associated with the Local Capacity



Invoice must include all details in order to check-out in the Settlements process.

Supplier Diversity

- SCE encourages Women-Owned, Minority-Owned, and Disabled Veteran-Owned and Lesbian, Gay, Bisexual, and Transgender Business Enterprises (“DBE”) participation
- CPUC General Order 156 sets the rules as required by CPUC Code
- See Section 6.4 of the DRAM RPA for DBE reporting requirements
- For additional information, please visit SCE’s website, www.sce.com/SD
 - Guidance is also available at www.sce.com/EnergyProcurement under the heading “Help & Guidance”
 - Contact Myn Kim (myn.kim@sce.com) regarding energy procurement opportunities and activities

Opportunities for Sellers to participate are through direct DBE contracting with SCE for RPA or Sellers subcontracting with DBE

Appendices



Useful Links - SCE

- Rule 24: https://www.sce.com/NR/sc3/tm2/pdf/Rule_24.pdf
- CISR-DRP Form, 14-941: <https://www.sce.com/NR/sc3/tm2/PDF/14-941.pdf>
- DRP Agreement Form, 14-941: <https://www.sce.com/NR/sc3/tm2/PDF/14-942.pdf>
- SCE DRAM Website: www.on.sce.com/DRAM contains resources such as:
 - Rule 24/DRAM Webinar Presentation
 - DRAM RFO Frequently Asked Questions
 - CISR-DRP Data Dictionary
 - Customer Migration Matrix
 - Forms and Documents



Useful Links - CAISO



CAISO Tariff

- <http://www.caiso.com/Documents/CombinedPDFDocument-FifthReplacementCAISOTariff.pdf>

CAISO Tariff Definitions

- <http://www.caiso.com/Documents/AppendixA-FifthReplacementCAISOTariff.pdf>

CAISO Demand Response Registration System (DRRS)

Customer Partnership Group

- <http://www.caiso.com/informed/Pages/MeetingsEvents/CustomPartnershipGroups/Default.aspx>

Enhancements

- <http://www.caiso.com/Documents/Presentation-EnablingDemandResponseRegistrationSystemEnhancements.pdf>

CAISO DRRS User Guide <https://www.caiso.com/Documents/DemandResponseUserGuide.pdf>

CAISO Demand Response Proxy Demand Resource (PDR) Business Requirement Specifications (PDR registrations)

- https://www.caiso.com/Documents/BusinessRequirementSpecifications_BRS_External23-Dec-2009.pdf

Useful Links – CAISO / CPUC

- CAISO Resource Adequacy
 - <https://www.caiso.com/planning/Pages/ReliabilityRequirements/Default.aspx> (Includes Resource Adequacy Plan Due Dates for the IOU's)
- CPUC Resource Adequacy Rules
 - <http://www.cpuc.ca.gov/ra/>



Rule 24 Contact Information

SCE's DRP Account Management (Demand Response Provider set-up)

 SCE3rdPartyDRP@sce.com

SCE's Green Button Connect My Data (3rd Party Registration)

- AMG@sce.com
- Paper CISR-DRP Processing and Report Fulfillment

 3rdParty@sce.com



Don't confuse us!

SCE DRAM Contact Information



SCE DRAM Website (FAQ, Regulatory documents, purchase agreement, etc.)

- www.on.sce.com/DRAM
- SCE DRAM Contract Origination (DRAM Solicitation)
 - DRAMRFO@sce.com
- SCE DRAM Contracts Management (Notices/Performance/Obligations)
 - Raafay Ahmed, (626) 302-8154, at raafay.ahmed@sce.com or
 - Dave Iversen (626) 302-1836, at dave.iversen@sce.com
- SCE Resource Adequacy Supply Plan (DRAM Contract Exhibit D)
 - Raafay Ahmed at raafay.ahmed@sce.com
 - Dave Iverson at dave.iversen@sce.com
- SCE DRAM Contracts Settlements and Invoices (Payments)
 - Betty Eastin, (626) 302- 3277, at betty.eastin@sce.com; and
 - Raafay Ahmed at raafay.ahmed@sce.com or Dave Iversen at dave.iversen@sce.com, and
 - PPFDPowerSettle@sce.com



Resource Adequacy – SCE Compliance Requirements

Year-Ahead RA Filing (CPUC)

- Filed by end of October of previous year
 - e.g., filed by October 31, 2018 for 2019 Calendar year compliance
- Demonstrate that LSEs can meet 90% of System RA requirements (May-Sept) and 100% of Local RA requirements (Jan-Dec)

Month-Ahead RA Filing (CPUC)

- Filed 45 days before showing month by LSE
 - e.g., file by November 16, 2018 for January 2019 compliance
- Demonstrate that LSEs can meet 100% of its aggregate System and Local RA requirements

Supply Plan (CAISO)

- Filed 45 days before showing month by Scheduling Coordinator and must match corresponding LSE RA Plan
 - e.g., file by November 16, 2018 for January 2019 compliance
- CAISO performs validation checks to ensure RA filing match the Supply Plan for accuracy and completeness