

PUBLIC UTILITIES COMMISSION

SAN FRANCISCO, CA 94102-3298



November 24, 2014

**Advice Letters: 190-G/2991-E  
190-G-A/2991-E-A  
190-G-B/2991-E-B**

Megan Scott-Kakures  
Vice President, Regulatory Operations  
Southern California Edison Company  
P O Box 800  
Rosemead, CA 91770

**Subject: SCE's Energy Efficiency On-Bill Repayment Financing Pilots  
and Supplemental Filings**

Dear Ms. Scott-Kakures:

Advice Letters 190-G/2991-E, 190-G-A/2991-E-A and 190-G-B/2991-E-B are effective November 18, 2014 per Resolution E-4680.

Sincerely,

A handwritten signature in cursive script that reads "Edward F. Randolph".

Edward F. Randolph, Director  
Energy Division

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December 30, 2013

**ADVICE 190-G/2991-E**  
**(U 338-E)**

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA  
ENERGY DIVISION

**SUBJECT:** Southern California Edison Company's Energy Efficiency  
On-Bill Repayment Financing Pilots

In compliance with Decision (D.)13-09-044, Southern California Edison Company (SCE) hereby submits for filing the following changes to its tariffs. The revised tariff sheets are listed on Attachment A and are attached hereto.

**PURPOSE**

Pursuant to D.13-09-044, Ordering Paragraphs (OPs) 10 and 11, this advice filing establishes SCE's electric Schedule OBR, On-Bill Repayment Pilot Program, and Form 14-938, Authorization to Add Loan Charges to SCE Bill (Non-Residential). In addition, SCE establishes its gas Schedule G-OBR, Santa Catalina Island On-Bill Repayment Pilot Program, and Form 14-938G, Authorization to Add Loan Charges to SCE Bill – Gas (Non-Residential).<sup>1</sup>

**BACKGROUND**

D.13-09-044 approved a total of seven financing pilot programs to be deployed in phases. Included in these pilots are four statewide pilots to test on-bill repayment (OBR). Program implementation plans (PIPS) for statewide OBR pilots were submitted on December 19, 2013.<sup>2</sup>

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<sup>1</sup> Pursuant to OP 10, SCE notes the Investor-Owned Utilities (IOUs) are submitting their proposed tariffs separately, but they were developed concurrently with uniform language to cover terms and conditions of the OBR Program Pilots.

<sup>2</sup> Southern California Gas Company (SoCalGas) filed a joint advice letter on behalf of the IOUs. See SCE Advice 2989-E et al.

With OBR, participating financial institutions (FIs) can finance energy efficiency (EE) investments and collect customer payments on SCE's bill. Transferability of the underlying debt obligation is permitted with written consent according to the conditions outlined in Schedule OBR. Non-payment of the debt obligation can result in service disconnection in the non-residential pilots.

D.13-09-044 requires a minimum of 70 percent of the loan be eligible EE measures (EEEMs). Up to 30 percent of the loan may be used for non-EEEMs. For the non-residential OBR pilot, which does not include ratepayer funded credit enhancements, demand response and distributed generation may be included in the 70 percent EEEMs category.

D.13-09-044 also ordered the establishment of an OBR Tariff to define the OBR terms and conditions for placing a loan obligation on SCE's bill. SCE establishes its Schedule OBR herein. Schedule OBR is applicable to the following four OBR pilots:

- Master-Metered Multifamily Financing Program (MMMFP) Pilot  
The MMMFP pilot offers multifamily property owners the opportunity to perform EE enhancements on their properties with repayment on the master utility bill without the risk of disconnection. Pilot eligibility is limited to affordable housing properties as outlined in the PIP. The pilot uses a debt service reserve fund (DSRF) as a credit enhancement. Any delinquent financing charges subsequently collected by FIs from customers will offset some or all of the DSRF funds paid out.
- Small Business Loan Program (SBLP) Pilot  
The SBLP pilot offers small businesses<sup>3</sup> the opportunity to perform EE enhancements on their business with repayment on the utility bill. The pilot uses a loan loss reserve (LLR) as a credit enhancement. Credit enhancement funds will be available to support secured and unsecured loans. The LLR will cover up to 20 percent of the total eligible loan value in the portfolio, with a \$200,000 cap on credit enhancement value per loan. Any delinquent financing charges subsequently collected by financial institutions from customers will offset some or all of the LLR funds paid out.
- On-Bill Small Business Lease Providers (OSBLP) Pilot  
The OSBLP pilot enables lease companies to offer leases to the small business sector<sup>4</sup> with monthly payments made through the customer's utility bill. The pilot utilizes credit enhancements to favorably influence the availability and terms of the lease products. The California Hub for Energy Efficiency Financing (CHEEF) will undertake a competitive request for proposals process with a goal of selecting at least two lease originators to participate in the program.

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<sup>3</sup> As defined by the United States Small Business Administration definitions found at 13 C.F.R. 121.

<sup>4</sup> *Ibid.*

- Non-Residential Without Credit Enhancement (NWOCE) Pilot

The NWOCE pilot is available to all non-residential customers and offers repayment of third party financing through the customer's utility bill. This pilot is not supported by a ratepayer funded credit enhancement. As such, NWOCE differs from the other pilots in that it allows demand response and distributed generation to be included in the 70 percent EEEMs category.

## **ROLE OF THE CHEEF**

Concurrent with the development of the OBR Tariff submitted herein, the California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) is undertaking activities to establish itself as the CHEEF. The CHEEF role is to structure the credit enhancements; develop broad terms and conditions for financial products offered through the pilots; coordinate and track the deal flow between qualified FIs, IOUs, and customers; protect the integrity of ratepayer funds held as credit enhancements; and provide transparency.

After receiving the necessary approvals to fill this role, CAEATFA will develop regulations for each pilot. Because the pilot regulations will be developed after the OBR Tariff is submitted, the IOUs consulted with CAEATFA to ensure that the tariff language address the terms and conditions of each pilot as adopted by D.13-09-044, but do not overstep the authority of CAEATFA to institute regulations. These circumstances were communicated to the Energy Division (ED) during the OBR Tariff consultation process and are reflective of the progression of program implementation outlined in D.13-09-044 (see the Preliminary Implementation Plan in Appendix G).

## **OBR TARIFF REQUIREMENTS**

Appendix C of D.13-09-044 contains suggested elements for the basic OBR tariff, and guidance for language and processes to achieve transferability according to the authorized conditions. The Decision also indicates the OBR Tariff should contain the following features:

- Forms and procedures for written consent to achieve transferability, and consequences for the obligation, if a landlord fails to comply or a subsequent tenant has not given written consent;
- Any other complementary and reasonable mechanisms to achieve and enforce transferability (e.g., due on sale if no consent);
- Utility service disconnection procedures similar to those adopted for the IOUs On Bill Financing (OBF) programs, including how they are triggered and executed; and
- Use of the IOUs' current OBF mechanism for allocating partial payments.

SCE, in its work with IOUs, CAEATFA, and other stakeholders, affirms use of Appendix C as guidelines for developing its proposed tariff language. Section H of

Schedule OBR addresses transferability of obligation to pay OBR charges, and references the required form to facilitate written consent to assignment and other requirements. Section F addresses billing and payment of OBR charges and treatment for partial payment and disconnection of nonresidential customers.

Pursuant to Ordering Paragraph 11 of D.13-09-044, the following steps were taken to consult with CAEATFA, FIs, real estate professionals, and California Public Utilities Commission (Commission) Staff to best achieve the program goals:

- The IOUs formed a statewide team to coordinate development of the OBR Tariff. CAEATFA participated as a member of this team and thus was involved in both a consultative and collaborative role in preparing the OBR Tariff and PIPs.
- The statewide team, through SoCalGas, consulted with ED staff regarding the development of the OBR Tariff.
- The statewide team consulted with real estate professionals regarding the OBR Tariff via a webinar conducted on November 22, 2013. The webinar provided an overview of the OBR process and the financing programs. The most substantive portion of the webinar included discussion of the OBR Tariff proposal and a question/answer session to better understand the perspective of, and any questions or concerns from, the real estate industry, specifically with respect to education and awareness, and transferability of the debt obligation to subsequent owners/dwellers. The session resulted in helpful input to development of the OBR Tariff.
- The statewide team consulted with FIs regarding the OBR Tariff via a webinar conducted on December 10, 2013. The draft tariff was provided to attendees prior to the webinar. The session also resulted in helpful input to inform/development of the OBR Tariff.

SoCalGas's Advice 4582, submitted on December 19, 2013, contains copies of the presentation materials shared during the real estate and FI webinars.<sup>5</sup> These webinar materials were developed to provide professionals/organizations with further understanding of the OBR pilot programs and to increase the likelihood of productive input.

### **Payment Prioritization**

D.13-09-044 directed the IOUs to apply existing OBF practices for application of partial payments for the OBR pilots.<sup>6</sup> The IOUs also received feedback from CAEATFA, the proposed CHEEF, that a uniform approach would allow them to more clearly communicate to potential FIs how payments would be applied on a statewide basis. Further, stakeholders participating in the IOUs' outreach efforts indicated that it is

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<sup>5</sup> The FI materials also contain information regarding the OBR PIPs which was another subject of that session.

<sup>6</sup> D.13-09-044, pp. 56-57.

important to have consistent statewide rules. Currently, the IOUs' practice for applying partial payment in the OBF program is not uniform. SoCalGas and San Diego Gas & Electric Company (SDG&E) use a "waterfall" approach, meaning partial payments are applied to the oldest debt first, even if the oldest debt is a third-party debt. In contrast, Pacific Gas and Electric Company (PG&E) and SCE apply partial payments on a *pro rata* or proportional basis.

Because a uniform approach is necessary, and PG&E's third party billing system functionality was built to apply a payment priority that is similar to that in use by SoCalGas and SDG&E, the IOUs determined that a waterfall practice should be used statewide. Utilizing this allocation will ensure consistent statewide rules, and make it easier for FIs to participate in the financing pilots.

### **PROPOSED TARIFF CHANGES**

SCE proposes the following tariffs for both electric and gas service:

- Establish Schedule OBR, On-Bill Repayment Pilot Program, and Schedule G-OBR, Santa Catalina Island On-Bill Repayment Pilot Program
- Establish Form 14-938, Authorization to Add Loan Charges to SCE Bill (Non-Residential), and Form 14-938G, Authorization to Add Loan Charges to SCE Bill – Gas (Non-Residential)

In addition, the monthly amount due will be itemized on those customers' bills participating in OBR.

### **TIER DESIGNATION**

SCE has determined that this filing is subject to Commission disposition and should be classified as Tier 3 (effective upon Commission approval). While D.13-09-044 ordered a Tier 2 advice letter, SCE determined it appropriate to file this Advice Letter as a Tier 3 advice letter due to the difference in the changes to the tariff that did not directly follow Commission order, as explained in the Payment Prioritization section above.

### **EFFECTIVE DATE**

This advice filing will become effective upon Commission approval.

### **NOTICE**

Anyone wishing to protest this advice filing may do so by letter via United States Mail, facsimile, or electronically, any of which must be received no later than 20 days after the date of this advice filing. Protests should be mailed 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:

Megan Scott-Kakures  
Vice President, Regulatory Operations  
Southern California Edison Company  
8631 Rush Street  
Rosemead, California 91770  
Facsimile: (626) 302-4829  
E-mail: [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com)

Leslie E. Starck  
Senior Vice President, Regulatory Policy & Affairs  
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)

No restrictions limit who may file a protest, but the protest must set forth specifically the grounds upon which it is based and must be submitted by the deadline identified above.

In accordance with Section 4 of General Order No. (GO) 96-B, SCE is serving copies of this advice filing to the interested parties shown on the attached Gas and Electric GO 96-B and A.12-07-001 et al. service lists. Address change requests to the GO 96-B service lists should be directed by electronic mail to [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com) or at (626) 302-2930. 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 filing and keeping the advice filing at SCE's corporate headquarters.

To view other SCE advice letters filed 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 at (626) 302-0294 or by electronic mail at [Joni.Key@sce.com](mailto:Joni.Key@sce.com).

Southern California Edison Company

/s/ MEGAN SCOTT-KAKURES

Megan Scott-Kakures

MSK:jk:sq  
Enclosures



# CALIFORNIA PUBLIC UTILITIES COMMISSION

## ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.: Southern California Edison Company (U 338-E)

Utility type:

ELC       GAS  
 PLC       HEAT     WATER

Contact Person: Darrah Morgan

Phone #: (626) 302-2086

E-mail: [Darrah.Morgan@sce.com](mailto:Darrah.Morgan@sce.com)

E-mail Disposition Notice to: [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com)

EXPLANATION OF UTILITY TYPE

ELC = Electric      GAS = Gas  
 PLC = Pipeline     HEAT = Heat      WATER = Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: 190-G/2991-E

Tier Designation: 3

Subject of AL: Southern California Edison Company's Energy Efficiency On-Bill Repayment Financing Pilots

Keywords (choose from CPUC listing): Compliance, Energy Efficiency, Forms

AL filing type:  Monthly  Quarterly  Annual  One-Time  Other

If AL filed in compliance with a Commission order, indicate relevant Decision/Resolution #:

D.13-09-044

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<sup>1</sup>: \_\_\_\_\_

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: upon Commission approval

No. of tariff sheets: -25-

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: electric Schedule G-OBR and Form 14-938G  
gas Schedule OBR and Form 14-938

Service affected and changes proposed<sup>1</sup>: \_\_\_\_\_

Pending advice letters that revise the same tariff sheets: None

<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 filing, unless otherwise authorized by the Commission, and shall be sent 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)

Megan Scott-Kakures  
Vice President, Regulatory Operations  
Southern California Edison Company  
8631 Rush Street  
Rosemead, California 91770  
Facsimile: (626) 302-4829  
E-mail: [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com)

Leslie E. Starck  
Senior Vice President, Regulatory Policy & Affairs  
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)

# **Gas Tariff Sheets**

Cal. P.U.C. Sheet No.	Title of Sheet	Cancelling Cal. P.U.C. Sheet No.
Original 1632-G	Schedule G-OBR	
Original 1633-G	Schedule G-OBR	
Original 1634-G	Schedule G-OBR	
Original 1635-G	Schedule G-OBR	
Original 1636-G	Schedule G-OBR	
Original 1637-G	Schedule G-OBR	
Original 1638-G*	Schedule G-OBR	
Original 1639-G	Schedule G-OBR	
Original 1640-G	Schedule G-OBR	
Original 1641-G	Forms 14-938G	
Revised 1642-G	Table of Contents	Revised 1621-G
Revised 1643-G	Table of Contents	Revised 1581-G



Schedule G-OBR  
SANTA CATALINA ISLAND ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 1

A. APPLICABILITY

This Schedule is applicable to natural gas service to non-residential End-Use Customers, and to residential master-metered multifamily End-Use Customers, who meet the criteria specified in Section E.2, below, and receive service under a SCE gas rate schedule.

The On-Bill Repayment (OBR) Pilots are designed to facilitate billing for loans or leases between Customers and Participating Financial Institutions (FIs) on the Customers' SCE bills (Bills) to finance the purchase or lease and installation of Qualified Measures (as defined below) by Customers at the Customers' Premises.

OBR is available for loans funded and closed by Participating FIs on or before December 31, 2015, or as otherwise directed by the California Public Utilities Commission (CPUC).

B. DEFINITIONS

The definitions of capitalized terms used in this Schedule are either defined in this Schedule or are defined in Rule 1, Definitions. Unless otherwise stated, all references to "Customer" in this Schedule will refer to SCE customers who have elected to participate in OBR.

**Affordable Multi-family Building:** means a multi-family property with deed restrictions that require the owner to keep rents affordable with income qualifying households occupying at least 50% of units, and the cost of gas is absorbed in the rental for the individual dwelling unit, there is no separate identifiable charge by such customer to the tenants for gas, and the rent does not vary with energy consumption.

**California Hub for Energy Efficiency Financing (CHEEF):** A central enabling entity through which energy users, financial institutions, energy efficiency providers and Participating Utilities can participate in a program to help finance the installation of Qualified Measures. The CHEEF may act through agents or third-party service providers.

**Eligible Lease:** A lease from a Participating Lessor to a Customer for lease of one or more Qualified Measures that satisfy the requirements for participation in OBR in the OBR Rules.

**Eligible Loan:** A loan from a Participating Lender to a Customer for one or more Qualified Measures that satisfy the requirements for participation in OBR in the OBR Rules.

(Continued)

(To be inserted by utility)  
Advice 190-G  
Decision 13-09-044

Issued by  
Megan Scott-Kakures  
Vice President

(To be inserted by Cal. PUC)  
Date Filed Dec 30, 2013  
Effective Nov 18, 2014  
Resolution E-4680



Schedule G-OBR  
SANTA CATALINA ISLAND ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 2

(Continued)

B. DEFINITIONS (Continued)

**Lease Agreement:** An agreement between Customer and Participating Lessor to rent or lease one or more Qualified Measures to be installed at the Customer's Premises and recover the Loan Charges through On-Bill Repayment.

**Lease Charge(s):** Amounts due during a billing period from a Customer to a Participating Lessor for an Eligible Lease, including any late fees, late payments, or any other fees as calculated by the Participating Lessor pursuant to the Lease Agreement.

**Loan Agreement:** An agreement between a Customer and a Participating Lender to finance Customer's purchase and installation of Qualified Measures at Customer's Premises and recover the Loan Charges through On-Bill Repayment.

**Loan Charge(s):** Amounts due during a billing period from a Customer to a Participating Lender for an Eligible Loan, including any interest, late fees, late payments, and any other fees as calculated by the Participating Lender pursuant to the Loan Agreement.

**On-Bill Repayment:** A process whereby OBR Charges, as defined below, are included in a Customer's Bill, paid concurrently with SCE Charges and forwarded to the Participating FI.

**OBR Charge:** A Loan Charge and/or Lease Charge relating to work performed at the Customer Premises associated with the Customer's account and included on a Customers' Bill pursuant to the Loan or Lease Agreement.

**OBR Rules:** Rules and requirements for participation in OBR established by the CHEEF.

**Participating FI:** A financial institution approved for participation in OBR by the CHEEF, which may be either a Participating Lender or Participating Lessor, as the case requires.

**Participating Lender:** A lender approved for participation in OBR by the CHEEF. Participating Lenders must be approved by the CHEEF pursuant to the standards in the OBR Rules, as may be modified from time to time, and must sign all agreements required by the OBR Rules.

**Participating Lessor:** A lessor selected for participation in OBR by the CHEEF. Participating Lessors must be selected by the CHEEF pursuant to its competitive procurement process and agree to comply with standards and regulations in the OBR Rules, as may be modified from time to time, and must sign all agreements required by the OBR Rules.

**Participating Utility:** Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and/or Southern California Gas Company.

(Continued)

(To be inserted by utility)  
Advice 190-G  
Decision 13-09-044

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Vice President

(To be inserted by Cal. PUC)  
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Schedule G-OBR  
SANTA CATALINA ISLAND ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 3

(Continued)

B. DEFINITIONS (Continued)

Qualified Measures: Measures included in the program implementation plans for OBR and approved by the CPUC for Customers to install at the location associated with the same account to which the OBR Charges will be billed. Which measures qualify as Qualified Measures is subject to CPUC approval and may change from time to time.

SCE Charges: Charges rendered by SCE for gas service, deposits, and related charges approved by the CPUC. OBR Charges are not SCE Charges.

C. TERRITORY

The OBR Pilots are available throughout SCE's gas service area, subject to the availability of Participating FIs.

D. RATES

All charges and provisions of the Customer's otherwise applicable rate schedule shall continue to apply. Each OBR Charge will appear as a separate line item (or multiple line items) on the Bill.

E. CUSTOMER ELIGIBILITY

1. Customer must have an Eligible Loan or Lease with a Participating FI and authorize SCE to include the OBR Charge on the Bill. Customers must be current on their SCE charges and OBR Charges at the time the OBR Charge is first added to the Bill (i.e. not in default or in arrears).
2. Owners of Affordable Multi-family Buildings where the gas services are either entirely or primarily master-metered, and do not live on the Premises are eligible to participate in OBR.
3. Customer must purchase or lease and install Qualified Measures funded through the Eligible Loan or Lease at the Premises associated with the Customer Account.
4. If Qualified Measures are primarily installed to reduce natural gas usage, Customer must be a gas distribution customer of SCE for the Premises where the Qualified Measures are installed.

(Continued)

(To be inserted by utility)

Advice 190-G  
Decision 13-09-044Issued by  
Megan Scott-Kakures  
Vice President

(To be inserted by Cal. PUC)

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Schedule G-OBR  
SANTA CATALINA ISLAND ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 4

(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES

1. SCE is authorized to include OBR Charge on a Bill until the Eligible Loan or Lease is fully repaid and discharged unless otherwise instructed by the CHEEF or as provided herein. Upon Customer's authorization, SCE will include the OBR Charge as a line item or items on the Customer's Bill as calculated and transmitted by the Participating FI and communicated to SCE by the CHEEF. SCE may rely on instructions received from the CHEEF and its agents and is not required to verify the amount of the OBR Charge or undertake any other verification or inquiry with respect to the transactions giving rise to the OBR Charge. OBR Charges may increase or decrease from month to month based on the Eligible Loan or Lease terms.
2. SCE will include or remove OBR Charges on the Bill only pursuant to instructions from the CHEEF or as otherwise required by law. Participating FIs shall inform the CHEEF if the Customer has initiated a dispute resolution process under the terms of the Eligible Loan or Lease. The CHEEF may instruct SCE to remove OBR Charges from the Bill pending the resolution of any dispute between a Customer and Participating FI. If SCE receives instructions from the CHEEF, or other court of competent jurisdiction, to remove OBR Charges, SCE will remove such charges from the Bill no later than the second billing cycle after such instructions are received. All collection and enforcement action with respect to an Eligible Loan or Lease shall be and remain the responsibility of the Participating FI.
3. In the event a Customer uses OBR to install Qualified Measures consisting of both gas and electric measures pursuant to the terms of an Eligible Loan or Lease, and is a Customer of more than one Participating Utility, then the OBR Charges attributable to such Eligible Loan or Lease will be placed on the Bill of the Participating Utility in proportion to the amount of the Eligible Loan or Lease attributable to the service provided by each Participating Utility, as determined by the Participating Utilities.
4. Customer shall pay OBR Charge along with all other charges on the Bill in accordance with the payment terms applicable to the Bill. All payments shall be made to SCE. SCE will forward the OBR Charge payments received to the CHEEF.
5. If SCE does not issue Customer a Bill because of either voluntary or involuntary termination of SCE service, SCE shall notify the CHEEF within 30 days of service termination. On and after such notification, SCE will have no further responsibility for collecting and remitting OBR Charges unless the responsibility to pay such OBR Charges is assumed by a subsequent Customer at the Premises, pursuant to Section H below.

(Continued)

(To be inserted by utility)

Advice 190-G  
Decision 13-09-044Issued by  
Megan Scott-Kakures  
Vice President

(To be inserted by Cal. PUC)

Date Filed Dec 30, 2013  
Effective Nov 18, 2014  
Resolution E-4680



Schedule G-OBR  
SANTA CATALINA ISLAND ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 5

(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES (Continued)

6. Partial Payment: SCE's billing system applies partial payment to the components of the bill in accordance with existing tariff rules. Non-payment of OBR Charges subject the Customer's account to service disconnection, payments will be applied to past due OBR Charges prior to current charges. Residential service is not subject to disconnection.

If a Customer makes only partial payment on a Bill, the partial payment will be applied to the following components of the Bill according to the priority of these components:

- a. SCE charges, which include utility service and credit establishment charges
- b. Energy-related charges, which include charges based on energy consumption and tariff schedules.
- c. Other applicable products and services charges, which include all other services billed by SCE such as OBR charges.

A Customer's failure to pay any of the components of the Bill (other than for master-metered residential properties) will subject the Customer to service termination as set forth in Rule 11.

7. Termination of SCE Service for Non Payment of OBR Charges: Unless otherwise prohibited by law, non-payment of OBR Charges by Customers other than those who reside in a residential or multi-family Premises, shall subject Customers to SCE service disconnection, consistent with the provisions of Rule 11, Discontinuance and Restoration of Service, on the same terms and conditions under which SCE will disconnect the Customer for failure to pay SCE Charges. SCE will reconnect service for a CPUC-authorized service fee when the criteria for reconnection, as specified in Rule 11, Discontinuance and Restoration of Service, have been met and delinquent OBR Charges and SCE Charges have been paid. In order to be eligible to be reconnected, Customer must only pay delinquent OBR Charges and not any accelerated balance of the Loan or Lease. Upon remedy of delinquent OBR Charges, Customers that have been terminated will also be required to meet the criteria of Gas Rule 6, Establishment and Re-Establishment of Credit.

(Continued)

(To be inserted by utility)

Advice 190-G  
Decision 13-09-044

Issued by  
Megan Scott-Kakures  
Vice President

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Date Filed Dec 30, 2013  
Effective Nov 18, 2014  
Resolution E-4680

Schedule G-OBR  
SANTA CATALINA ISLAND ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 6

(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES (Continued)

8. Declaration of Event of Default Under Loan or Lease Agreement: If the Participating FI elects to declare an event of default under the Loan or Lease Agreement it may demand immediate repayment of the entire principal and interest amounts outstanding (acceleration of loan repayment). If the FI chooses to accelerate the loan repayment, the FI must instruct the CHEEF to request SCE remove all OBR Charges from the Bill. No accelerated loan repayments shall be eligible to be serviced as an OBR Charge. The Participating FI shall be fully responsible for collecting all further amounts due under the Loan or Lease Agreement from the Customer.
9. Customer Bankruptcy: If a Customer enters into bankruptcy protection under the United States Bankruptcy Code, SCE upon notice, shall remove all OBR Charges from the Bill. If SCE service was disconnected due to non-payment of SCE Charges or Loan Charges, service shall be reconnected if required to comply with Bankruptcy Law provided the Customer complies with Rules 6 and 11. The Participating FI shall be fully responsible for collecting all further amounts due under the Loan or Lease Agreement from the Customer.
10. Security Deposit: If Customer has or is required to provide a security deposit to establish or re-establish credit with SCE in order to connect or reconnect service, the OBR Charges will not be included in the calculation of the security deposit pursuant to Rule 6. The Security Deposit and interest earned on the deposit, if any, will not apply to delinquent or current Loan or Lease Charges and Participating Lender or Lessor will have no claim on or interest in the Security Deposit and interest earned on the deposit, if any.
11. Prepayment of OBR Charges: SCE is not responsible for collecting, receiving or remitting any amounts to be attributable to prepayment of Customer's Eligible Loan or Lease. If, in accordance with the Loan or Lease Agreement, the Customer elects to pay some or all of the outstanding Eligible Loan or Lease balance independent of the OBR Charge, the Customer must send such payment directly to the Participating FI, rather than to SCE. Any Prepayments paid directly to SCE may, at SCE's sole discretion, be applied proportionally to subsequent SCE Charges and OBR Charges and SCE shall have no obligation to credit such prepayments exclusively to subsequent OBR Charges.

(Continued)

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Schedule G-OBR  
SANTA CATALINA ISLAND ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 7

(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES (Continued)

12. Bill Impacts: OBR Charges may increase the amount of the Bill. OBR Charges may or may not be offset in whole or in part by a reduction in Customer's energy usage resulting from the installation of Qualified Measures and Customer shall not be entitled to claim any reduction in OBR Charges based on the extent to which Qualified Measures achieve their anticipated benefits. OBR Charges must be paid by Customer whether or not the Qualified Measures result in a reduction in Customer's energy usage or Bill savings. SCE disclaims any warranty including warranty of merchantability or fitness for a particular purpose regarding any Qualified Measures.
13. Loan Disclosures: Nothing in this Schedule shall relieve Participating FIs from any obligation by law to make disclosures or to provide periodic statements or other information to Customers with respect to Eligible Loans and Leases. SCE assumes no responsibility with respect to such disclosures and reporting by virtue of providing OBR services pursuant to this Schedule.
14. Payment Arrangements: SCE will not be able to extend payment arrangements as defined by Gas Rule 11 to Customers with OBR Charges on their Bills.

G. REQUIRED AGREEMENTS

1. Loan or Lease Agreement: Customers participating in the OBR Pilots must execute a Loan or Lease Agreement with a Participating FI which specifies the repayment obligations in accordance with the OBR Rules and any other associated agreements required by the FI.
2. Customer Billing Agreement: Customer is required to sign an "Authorization to Add Loan Charges to SCE Bill (Non-Residential)" (Form 14-938) with SCE that specifies the terms and conditions under which SCE will include the OBR Charges, along with confirmation of SCE disconnect provisions.
3. Customer must sign Form 14-796 "*Authorization To: Receive Customer Information or Act on a Customer's Behalf*"<sup>i</sup> to provide the CHEEF and a Participating Lender or Lessor authorization to access customer billing information.

<sup>i</sup> <https://www.sce.com/NR/sc3/tm2/PDF/14-796.pdf>

(Continued)

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Schedule G-OBR  
SANTA CATALINA ISLAND ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 8

(Continued)

H. TRANSFERABILITY OF OBLIGATION TO PAY OBR CHARGES

1. Responsibility to pay OBR Charges may be voluntarily assumed by the subsequent customer of record at the same Premises. In order to assume OBR Charges, the subsequent customer at the same Premises must consent to assume the obligation to pay the balance due on the Eligible Loan or Lease in a writing as deemed appropriate by the Participating FI and must fully execute a Customer Agreement (Form 14-938) whereby the subsequent customer accepts and assumes the responsibility to pay the remaining OBR Charges on the Bill. SCE will include OBR Charges on the Bill of the subsequent customer only pursuant to instructions received from the CHEEF. At that point, the subsequent customer becomes the Customer for the purposes of this Schedule.
2. In the event the Customer ceases to be the Customer of record at the Premises where the Qualified Measures funded by proceeds from the Eligible Loan or Lease are installed, and the subsequent customer does not assume responsibility to pay all further OBR Charges, Customer remains fully responsible for all remaining amounts due under the terms of the Eligible Loan or Lease to the Participating FI pursuant to the terms of the Loan or Lease Agreement, and SCE will have no further obligation to collect OBR Charges.

I. BILLING INQUIRIES OR DISPUTES

1. Customer inquiries concerning SCE Charges should be directed to SCE.
2. Customer inquiries concerning the OBR Charges should be directed to the Participating FI.
3. Where the Customer disputes its obligations to pay an OBR Charge, the dispute shall be resolved between the Customer and the Participating FI and SCE shall not be a party to the dispute. SCE will continue to include the OBR Charge on the Bill pending dispute resolution unless otherwise instructed by the CHEEF or court of competent jurisdiction as set forth in F.2 above.
4. If a Customer subsequently contacts the CHEEF regarding ]SCE billing service, rather than a dispute with the Participating FI, the Customer will be referred to the CPUC's Consumer Affairs Branch (CAB) for assistance through its dispute resolution process. Disputes with the Participating FI regarding any terms of the Eligible Loan or Lease must be resolved directly with the Participating FI and cannot be resolved by CAB.

(Continued)

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Schedule G-OBR  
SANTA CATALINA ISLAND ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 9

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J. LIABILITY IN CONNECTION WITH OBR CHARGES AND CONDUCT BY PARTICIPATING LENDERS, LESSORS, CONTRACTORS, AND SERVICE PROVIDERS.

SCE shall not be liable to Customer for any damages caused by Participating FI's failure to perform any commitment to the Customer or misrepresentation to the Customer. The amount of the OBR Charges shall be provided to SCE by the CHEEF. SCE shall not be liable to Customer if the amount of such charges is inaccurate in any way or contains charges that are in violation of the Loan or Lease Agreement or any state or federal laws. The Participating FI is not SCE's agent for any purpose by virtue of the OBR billing procedures set forth in this Schedule. SCE shall not be liable to the Customer for any damages resulting from any acts, omissions, or representations made by a Participating FI or a contractor or service provider in connection with soliciting customers for Qualified Measures or for the Eligible Loan or Lease.

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Southern California Edison  
Rosemead, California (U 338-E)

Original  
Cancelling

Cal. PUC Sheet No. 1641-G  
Cal. PUC Sheet No.

Sheet 1

AUTHORIZATION TO ADD LOAN CHARGES  
TO SCE BILL – GAS  
(NON-RESIDENTIAL)

Form 14-938G

(To be inserted by utility)

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# AUTHORIZATION TO ADD LOAN CHARGES TO SCE BILL - GAS (Non-residential)

You have applied for, or have been given, a lease or loan to finance improvements to your building. The loan or lease is being made by the financial institution described below. By signing this Authorization, you consent to allow SCE to include monthly loan or lease repayment charges in your monthly utility bill, and you agree to pay those charges, on the terms described below.

Please note that this Authorization contains summary information about the On-Bill Repayment (OBR) Pilots. Before you sign this document, you should first review the more detailed program rules regarding the OBR Pilots and the OBR Tariff Schedule.

In this document:

**"Loan or Lease Charges"** means any and all principal, interest and other charges and fees payable by you in connection with your loan or lease, as determined by your Financial Institution, including fees for late or deficient payments.

**"Financial Institution"** means the lender or lessor shown in the Account Information section below.

**"Service Address(es)"** means the property or properties serviced by SCE as shown in the Account Information section below.

**"You"** means you, the customer(s) signing this authorization.

1. **Authorization to Bill Loan Charges.** You authorize SCE to include Loan or Lease Charges in your SCE bills for the Service Address(es) until further notice. The Financial Institution will determine the amount of the Loan or Lease Charge that is to be included in each bill, and SCE will include that amount in your utility bill. SCE does not verify the information provided by the Financial Institution. The Loan or Lease Charges may increase or decrease from month to month based on the terms of the loan or lease, the inclusion of late charges and interest, in accordance with the loan or lease terms, and variations in the periods of time covered by each SCE billing cycle.
2. **Payment.** You agree to pay the Loan or Lease Charges along with the other charges in your utility bill by the due date for payment of the utility bill. All payments should be made to SCE. SCE will forward your Loan or Lease Charge payments to the Financial Institution. If a funding account for the SCE payment is a credit card or checking account, SCE will not forward your payment to the Financial Institution unless that account has sufficient available credit to pay the full amount of the energy charges and the Loan or Lease Charges. If your funding account closes or is restricted for any reason, all pending payments to the Financial Institution associated with the account will be cancelled and it is your sole responsibility to make all pending and future payments to the Financial Institution.
3. **Partial Payments.** If you pay less than the total amount of your utility bill (including Loan or Lease Charges), the amount you pay will be allocated in accordance with existing Rules. Non-payment of OBR charges subjects the Customer's account to service disconnection, payments will be applied to past due OBR Charges prior to current charges.

If a Customer makes only partial payment on a Bill, the partial payment will be applied to the following components of the bill according to the priority of these components:

- a. SCE charges, which include utility service and credit establishment charges
- b. Energy-related charges, which include charges based on energy consumption and tariff schedules.
- c. Other applicable products and services charges, which include all other services billed by the SCE such as OBR charges.

A Customer's failure to pay any of the components (other than for master-metered residential properties) will subject the Customer to service termination as set forth in Rule 9.

Please note that, if SCE stops billing you for Loan or Lease Charges before the Loan or Lease is paid in full, you are still responsible for making loan or lease payments directly to the Financial Institution. Late payments may be subject to reporting to credit agencies by the Financial Institution.

4. **Overpayments.** Overpayments will be applied to the amounts due currently or in the future to SCE for energy charges and will not be applied to the Loan or Lease Charges. If you want to prepay Loan or Lease Charges, you must send the payment directly to the Financial Institution.
5. **Billing Inquiries and Disputes.** If you have any questions about your Loan or Lease or your Loan or Lease Charges, including any concerns that you may have been incorrectly charged, please contact the Financial Institution at the number shown in the Account Information section below. Any disputes about your Loan or Lease Charges must be resolved between you and the Financial Institution in accordance with your loan or lease documentation and applicable law. SCE will not be involved in resolving such disputes. Questions about the energy charges on your utility bill should be directed to SCE at the number shown on the bill.
6. **Transfer of Payment Obligation:** Responsibility to pay OBR Charges may be voluntarily assumed by the subsequent customer of record at the same location. You must first obtain the permission of your Financial Institution to assign your payment obligation to the next customer who occupies the same property where the improvements were installed. If the Financial Institution and subsequent customer agree in writing to assume the charges, the new customer must sign the "Authorization to Add Loan Charges to SCE Bill (Non-Residential)."
7. **Service Disconnection for Non-Payment of Loan or Lease Charges (Non-Residential Customers only):** You acknowledge that non-payment of your loan or lease charges will result in a disconnection of your utility service consistent with the rules that generally apply to non-payment of your utility bill, until such time that your Loan or Lease payments and your SCE charges are made current. Other rules for reconnection of service, including a requirement to post a security deposit, are set forth in SCE Gas Rules 7 and 11.
8. **Jurisdiction.** This Authorization at all times shall be subject to such modifications as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.
9. **Authorization to Release Information.** If you choose to participate in the On-Bill Repayment Pilot Program, you must also sign one additional form to allow the release of confidential information regarding your utility bill payment history: *Form 14-796 "Authorization To: Receive Customer Information or Act On a Customer's Behalf"* to provide the California Hub for Energy Efficiency Financing (CHEEF) and your Financial Institution authorization to access customer billing information.
10. **SCE not Liable for Improvements and Loan or Lease Process.** SCE is not involved in the improvements to your building, the assessment of potential benefits and costs associated with the improvements, or Financial Institution's procedures. You acknowledge that SCE does not accept any responsibility for the improvements, the anticipated energy efficiency or energy savings benefits, or other benefits, or for any aspect of the loan or lease process. SCE also disclaims any warranty including the warranty of merchantability or fitness for a particular purpose regarding any improvements. Any questions or claims regarding those matters should be directed to the Financial Institution or to the installation contractor.





Financial Institution Approval:

Financial Institution confirms that the Account Information shown above accords with its records.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
TELEPHONE NUMBER

\_\_\_\_\_  
COMPANY

Executed this \_\_\_\_ day of \_\_\_\_\_  
MONTH AND YEAR



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# **Electric Tariff Sheets**

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Schedule OBR  
ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 1

A. APPLICABILITY

This Schedule is applicable to electric service to non-residential Customers, and to residential master-metered multifamily Customers who meet the eligibility criteria specified in Section E.2, below, and receive service under a SCE electric rate schedule.

The On-Bill Repayment (OBR) Pilots are designed to facilitate billing for loans or leases between Customers and Participating Financial Institutions (FIs) on the Customers' SCE bills (Bills) to finance the purchase or lease and installation of Qualified Measures (as defined below) by Customers at the Customers' Premises.

OBR is available for loans funded and closed by Participating FIs on or before December 31, 2015, or as otherwise directed by the California Public Utilities Commission (CPUC).

B. DEFINITIONS

The definitions of capitalized terms used in this Schedule are either defined in this Schedule or are defined in Rule 1, Definitions. Unless otherwise stated, all references to "Customer" in this Schedule will refer to SCE customers who have elected to participate in OBR.

Affordable Multi-family Building: means a multi-family property with deed restrictions that require the owner to keep rents affordable with income qualifying households occupying at least 50% of units, and the cost of electricity is absorbed in the rental for the individual dwelling unit, there is no separate identifiable charge by such customer to the tenants for electricity, and the rent does not vary with electric consumption.

California Hub for Energy Efficiency Financing (CHEEF): A central enabling entity through which energy users, financial institutions, energy efficiency providers and Participating Utilities can participate in a program to help finance the installation of Qualified Measures. The CHEEF may act through agents or third-party service providers.

Eligible Lease: A lease from a Participating Lessor to a Customer for lease of one or more Qualified Measures that satisfy the requirements for participation in OBR in the OBR Rules.

Eligible Loan: A loan from a Participating Lender to a Customer for one or more Qualified Measures that satisfy the requirements for participation in OBR in the OBR Rules.

(Continued)

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Schedule OBR  
ON-BILL REPAYMENT  
PILOT PROGRAM  
(Continued)

Sheet 2

B. DEFINITIONS (Continued)

Lease Agreement: An agreement between Customer and Participating Lessor to rent or lease one or more Qualified Measures to be installed at the Customer's Premises and recover the Loan Charges through On-Bill Repayment.

Lease Charge(s): Amounts due during a billing period from a Customer to a Participating Lessor for an Eligible Lease, including any late fees, late payments, or any other fees as calculated by the Participating Lessor pursuant to the Lease Agreement.

Loan Agreement: An agreement between a Customer and a Participating Lender to finance Customer's purchase and installation of Qualified Measures at Customer's Premises and recover the Loan Charges through On-Bill Repayment.

Loan Charge(s): Amounts due during a billing period from a Customer to a Participating Lender for an Eligible Loan, including any interest, late fees, late payments, and any other fees as calculated by the Participating Lender pursuant to the Loan Agreement.

On-Bill Repayment: A process whereby OBR Charges, as defined below, are included in a Customer's Bill, paid concurrently with SCE Charges and forwarded to the Participating FI.

OBR Charge: A Loan Charge and/or Lease Charge relating to work performed at the Customer Premises associated with the Customer's account and included on a Customers' Bill pursuant to the Loan or Lease Agreement.

OBR Rules: Rules and requirements for participation in OBR established by the CHEEF.

Participating FI: A financial institution approved for participation in OBR by the CHEEF, which may be either a Participating Lender or Participating Lessor, as the case requires.

Participating Lender: A lender approved for participation in OBR by the CHEEF. Participating Lenders must be approved by the CHEEF pursuant to the standards in the OBR Rules, as may be modified from time to time, and must sign all agreements required by the OBR Rules.

Participating Lessor: A lessor selected for participation in OBR by the CHEEF. Participating Lessors must be selected by the CHEEF pursuant to its competitive procurement process and agree to comply with standards and regulations in the OBR Rules, as may be modified from time to time, and must sign all agreements required by the OBR Rules.

Participating Utility: Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and/or Southern California Gas Company.

(Continued)

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Schedule OBR  
ON-BILL REPAYMENT  
PILOT PROGRAM  
(Continued)

Sheet 3

B. DEFINITIONS (Continued)

Qualified Measures: Measures included in the program implementation plans for OBR and approved by the CPUC for Customers to install at the location associated with the same account to which the OBR Charges will be billed. Which measures qualify as Qualified Measures is subject to CPUC approval and may change from time to time.

SCE Charges: Charges rendered by SCE for electric service, deposits, and related charges approved by the CPUC. OBR Charges are not SCE Charges.

C. TERRITORY

The OBR Pilots are available throughout SCE's electric service area, subject to the availability of Participating FIs.

D. RATES

All charges and provisions of the Customer's otherwise applicable rate schedule shall continue to apply. Each OBR Charge will appear as a separate line item (or multiple line items) on the Bill.

E. CUSTOMER ELIGIBILITY

1. Customer must have an Eligible Loan or Lease with a Participating FI and authorize SCE to include the OBR Charge on the Bill. Customers must be current on their SCE charges and OBR Charges at the time the OBR Charge is first added to the Bill (i.e. not in default or in arrears).
2. Owners of Affordable Multi-family Buildings where the electric service is either entirely or primarily master-metered, and do not live on the Premises are eligible to participate in OBR.
3. Customer must purchase or lease and install Qualified Measures funded through the Eligible Loan or Lease at the Premises associated with the Customer Account.
4. If Qualified Measures are primarily installed to reduce electric usage, Customer must be an electric distribution customer of SCE for the Premises where the Qualified Measures are installed.

(Continued)

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Schedule OBR  
ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 4

(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES

1. SCE is authorized to include OBR Charge on a Bill until the Eligible Loan or Lease is fully repaid and discharged unless otherwise instructed by the CHEEF or as provided herein. Upon Customer's authorization, SCE will include the OBR Charge as a line item or items on the Customer's Bill as calculated and transmitted by the Participating FI and communicated to SCE by the CHEEF. SCE may rely on instructions received from the CHEEF and its agents and is not required to verify the amount of the OBR Charge or undertake any other verification or inquiry with respect to the transactions giving rise to the OBR Charge. OBR Charges may increase or decrease from month to month based on the Eligible Loan or Lease terms.
2. SCE will include or remove OBR Charges on the Bill only pursuant to instructions from the CHEEF or as otherwise required by law. Participating FIs shall inform the CHEEF if the Customer has initiated a dispute resolution process under the terms of the Eligible Loan or Lease. The CHEEF may instruct SCE to remove OBR Charges from the Bill pending the resolution of any dispute between a Customer and Participating FI. If SCE receives instructions from the CHEEF, or other court of competent jurisdiction, to remove OBR Charges, SCE will remove such charges from the Bill no later than the second billing cycle after such instructions are received. All collection and enforcement action with respect to an Eligible Loan or Lease shall be and remain the responsibility of the Participating FI.
3. In the event a Customer uses OBR to install Qualified Measures consisting of both gas and electric measures pursuant to the terms of an Eligible Loan or Lease, and is a Customer of more than one Participating Utility, then the OBR Charges attributable to such Eligible Loan or Lease will be placed on the Bill of the Participating Utility in proportion to the amount of the Eligible Loan or Lease attributable to the service provided by each Participating Utility, as determined by the Participating Utilities.
4. Customer shall pay OBR Charge along with all other charges on the Bill in accordance with the payment terms applicable to the Bill. All payments shall be made to SCE. SCE will forward the OBR Charge payments received to the CHEEF.
5. If SCE does not issue Customer a Bill because of either voluntary or involuntary termination of SCE service, SCE shall notify the CHEEF within 30 days of service termination. On and after such notification, SCE will have no further responsibility for collecting and remitting OBR Charges unless the responsibility to pay such OBR Charges is assumed by a subsequent Customer at the Premises, pursuant to Section H below.

(Continued)

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PILOT PROGRAM

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(Continued)

F. BILLING AND PAYMENT OF OBR CHARGES (Continued)

6. Partial Payment: SCE's billing system applies partial payment to the components of the bill in accordance with existing tariff rules. Non-payment of OBR Charges subject the Customer's account to service disconnection, payments will be applied to past due OBR Charges prior to current charges. Residential service is not subject to disconnection.

If a Customer makes only partial payment on a Bill, the partial payment will be applied to the following components of the Bill according to the priority of these components:

- a. SCE charges, which include utility service and credit establishment charges
- b. Energy-related charges, which include charges based on energy consumption and tariff schedules.
- c. Other applicable products and services charges, which include all other services billed by SCE such as OBR charges.

A Customer's failure to pay any of the components of the Bill (other than for master-metered residential properties) will subject the Customer to service termination as set forth in Rule 11.

7. Termination of SCE Service for Non Payment of OBR Charges: Unless otherwise prohibited by law, non-payment of OBR Charges by Customers other than those who reside in a residential or multi-family Premises, shall subject Customers to SCE service disconnection, consistent with the provisions of Rule 11, Discontinuance and Restoration of Service, on the same terms and conditions under which SCE will disconnect the Customer for failure to pay SCE Charges. SCE will reconnect service for a CPUC-authorized service fee when the criteria for reconnection, as specified in Rule 11, Discontinuance and Restoration of Service, have been met and delinquent OBR Charges and SCE Charges have been paid. In order to be eligible to be reconnected, Customer must only pay delinquent OBR Charges and not any accelerated balance of the Loan or Lease. Upon remedy of delinquent OBR Charges, Customers that have been terminated will also be required to meet the criteria of Electric Rule 6, Establishment and Re-Establishment of Credit.

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Schedule OBR  
ON-BILL REPAYMENT  
PILOT PROGRAM

Sheet 6

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F. BILLING AND PAYMENT OF OBR CHARGES (Continued)

- 8. Declaration of Event of Default Under Loan or Lease Agreement: If the Participating FI elects to declare an event of default under the Loan or Lease Agreement it may demand immediate repayment of the entire principal and interest amounts outstanding (acceleration of loan repayment). If the FI chooses to accelerate the loan repayment, the FI must instruct the CHEEF to request SCE remove all OBR Charges from the Bill. No accelerated loan repayments shall be eligible to be serviced as an OBR Charge. The Participating FI shall be fully responsible for collecting all further amounts due under the Loan or Lease Agreement from the Customer.
- 9. Customer Bankruptcy: If a Customer enters into bankruptcy protection under the United States Bankruptcy Code, SCE upon notice, shall remove all OBR Charges from the Bill. If SCE service was disconnected due to non-payment of SCE Charges or Loan Charges, service shall be reconnected if required to comply with Bankruptcy Law provided the Customer complies with Rules 6 and 11. The Participating FI shall be fully responsible for collecting all further amounts due under the Loan or Lease Agreement from the Customer.
- 10. Security Deposit: If Customer has or is required to provide a security deposit to establish or re-establish credit with SCE in order to connect or reconnect service, the OBR Charges will not be included in the calculation of the security deposit pursuant to Rule 6. The Security Deposit and interest earned on the deposit, if any, will not apply to delinquent or current Loan or Lease Charges and Participating Lender or Lessor will have no claim on or interest in the Security Deposit and interest earned on the deposit, if any.
- 11. Prepayment of OBR Charges: SCE is not responsible for collecting, receiving or remitting any amounts to be attributable to prepayment of Customer's Eligible Loan or Lease. If, in accordance with the Loan or Lease Agreement, the Customer elects to pay some or all of the outstanding Eligible Loan or Lease balance independent of the OBR Charge, the Customer must send such payment directly to the Participating FI, rather than to SCE. Any Prepayments paid directly to SCE may, at SCE's sole discretion, be applied proportionally to subsequent SCE Charges and OBR Charges and SCE shall have no obligation to credit such prepayments exclusively to subsequent OBR Charges.

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F. BILLING AND PAYMENT OF OBR CHARGES (Continued)

12. Bill Impacts: OBR Charges may increase the amount of the Bill. OBR Charges may or may not be offset in whole or in part by a reduction in Customer's energy usage resulting from the installation of Qualified Measures and Customer shall not be entitled to claim any reduction in OBR Charges based on the extent to which Qualified Measures achieve their anticipated benefits. OBR Charges must be paid by Customer whether or not the Qualified Measures result in a reduction in Customer's energy usage or Bill savings. SCE disclaims any warranty including warranty of merchantability or fitness for a particular purpose regarding any Qualified Measures.
13. Loan Disclosures: Nothing in this Schedule shall relieve Participating FIs from any obligation by law to make disclosures or to provide periodic statements or other information to Customers with respect to Eligible Loans and Leases. SCE assumes no responsibility with respect to such disclosures and reporting by virtue of providing OBR services pursuant to this Schedule.
14. Payment Arrangements: SCE will not be able to extend payment arrangements as defined by Electric Rule 11 to Customers with OBR Charges on their Bills.

G. REQUIRED AGREEMENTS

1. Loan or Lease Agreement: Customers participating in the OBR Pilots must execute a Loan or Lease Agreement with a Participating FI which specifies the repayment obligations in accordance with the OBR Rules and any other associated agreements required by the FI.
2. Customer Billing Agreement: Customer is required to sign an "Authorization to Add Loan Charges to SCE Bill (Non-Residential)" (Form 14-938) with SCE that specifies the terms and conditions under which SCE will include the OBR Charges, along with confirmation of SCE disconnect provisions.
3. Customer must sign Form 14-796 "*Authorization To: Receive Customer Information or Act on a Customer's Behalf*"<sup>i</sup> to provide the CHEEF and a Participating Lender or Lessor authorization to access customer billing information.

<sup>i</sup> <https://www.sce.com/NR/sc3/tm2/PDF/14-796.pdf>

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ON-BILL REPAYMENT  
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H. TRANSFERABILITY OF OBLIGATION TO PAY OBR CHARGES

1. Responsibility to pay OBR Charges may be voluntarily assumed by the subsequent customer of record at the same Premises. In order to assume OBR Charges, the subsequent customer at the same Premises must consent to assume the obligation to pay the balance due on the Eligible Loan or Lease in a writing as deemed appropriate by the Participating FI and must fully execute a Customer Agreement (Form 14-938) whereby the subsequent customer accepts and assumes the responsibility to pay the remaining OBR Charges on the Bill. SCE will include OBR Charges on the Bill of the subsequent customer only pursuant to instructions received from the CHEEF. At that point, the subsequent customer becomes the Customer for the purposes of this Schedule.
2. In the event the Customer ceases to be the Customer of record at the Premises where the Qualified Measures funded by proceeds from the Eligible Loan or Lease are installed, and the subsequent customer does not assume responsibility to pay all further OBR Charges, Customer remains fully responsible for all remaining amounts due under the terms of the Eligible Loan or Lease to the Participating FI pursuant to the terms of the Loan or Lease Agreement, and SCE will have no further obligation to collect OBR Charges.

I. BILLING INQUIRIES OR DISPUTES

1. Customer inquiries concerning SCE Charges should be directed to SCE.
2. Customer inquiries concerning the OBR Charges should be directed to the Participating FI.
3. Where the Customer disputes its obligations to pay an OBR Charge, the dispute shall be resolved between the Customer and the Participating FI and SCE shall not be a party to the dispute. SCE will continue to include the OBR Charge on the Bill pending dispute resolution unless otherwise instructed by the CHEEF or court of competent jurisdiction as set forth in F.2 above.
4. If a Customer subsequently contacts the CHEEF regarding ]SCE billing service, rather than a dispute with the Participating FI, the Customer will be referred to the CPUC's Consumer Affairs Branch (CAB) for assistance through its dispute resolution process. Disputes with the Participating FI regarding any terms of the Eligible Loan or Lease must be resolved directly with the Participating FI and cannot be resolved by CAB.

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J. LIABILITY IN CONNECTION WITH OBR CHARGES AND CONDUCT BY PARTICIPATING LENDERS, LESSORS, CONTRACTORS, AND SERVICE PROVIDERS.

SCE shall not be liable to Customer for any damages caused by Participating FI's failure to perform any commitment to the Customer or misrepresentation to the Customer. The amount of the OBR Charges shall be provided to SCE by the CHEEF. SCE shall not be liable to Customer if the amount of such charges is inaccurate in any way or contains charges that are in violation of the Loan or Lease Agreement or any state or federal laws. The Participating FI is not SCE's agent for any purpose by virtue of the OBR billing procedures set forth in this Schedule. SCE shall not be liable to the Customer for any damages resulting from any acts, omissions, or representations made by a Participating FI or a contractor or service provider in connection with soliciting customers for Qualified Measures or for the Eligible Loan or Lease.

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Southern California Edison  
Rosemead, California (U 338-E)

Original  
Cancelling

Cal. PUC Sheet No. 53942-E  
Cal. PUC Sheet No.

Sheet 1

AUTHORIZATION TO ADD LOAN CHARGES  
TO SCE BILL  
(NON-RESIDENTIAL)

Form 14-938

(To be inserted by utility)

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# AUTHORIZATION TO ADD LOAN CHARGES TO SCE BILL (Non-residential)

You have applied for, or have been given, a lease or loan to finance improvements to your building. The loan or lease is being made by the financial institution described below. By signing this Authorization, you consent to allow SCE to include monthly loan or lease repayment charges in your monthly utility bill, and you agree to pay those charges, on the terms described below.

Please note that this Authorization contains summary information about the On-Bill Repayment (OBR) Pilots. Before you sign this document, you should first review the more detailed program rules regarding the OBR Pilots and the OBR Tariff Schedule.

In this document:

**“Loan or Lease Charges”** means any and all principal, interest and other charges and fees payable by you in connection with your loan or lease, as determined by your Financial Institution, including fees for late or deficient payments.

**“Financial Institution”** means the lender or lessor shown in the Account Information section below.

**“Service Address(es)”** means the property or properties serviced by SCE as shown in the Account Information section below.

**“You”** means you, the customer(s) signing this authorization.

1. **Authorization to Bill Loan Charges.** You authorize SCE to include Loan or Lease Charges in your SCE bills for the Service Address(es) until further notice. The Financial Institution will determine the amount of the Loan or Lease Charge that is to be included in each bill, and SCE will include that amount in your utility bill. SCE does not verify the information provided by the Financial Institution. The Loan or Lease Charges may increase or decrease from month to month based on the terms of the loan or lease, the inclusion of late charges and interest, in accordance with the loan or lease terms, and variations in the periods of time covered by each SCE billing cycle.
2. **Payment.** You agree to pay the Loan or Lease Charges along with the other charges in your utility bill by the due date for payment of the utility bill. All payments should be made to SCE. SCE will forward your Loan or Lease Charge payments to the Financial Institution. If a funding account for the SCE payment is a credit card or checking account, SCE will not forward your payment to the Financial Institution unless that account has sufficient available credit to pay the full amount of the energy charges and the Loan or Lease Charges. If your funding account closes or is restricted for any reason, all pending payments to the Financial Institution associated with the account will be cancelled and it is your sole responsibility to make all pending and future payments to the Financial Institution.
3. **Partial Payments.** If you pay less than the total amount of your utility bill (including Loan or Lease Charges), the amount you pay will be allocated in accordance with existing Rules. Non-payment of OBR charges subjects the Customer’s account to service disconnection, payments will be applied to past due OBR Charges prior to current charges.

If a Customer makes only partial payment on a Bill, the partial payment will be applied to the following components of the bill according to the priority of these components:

- a. SCE charges, which include utility service and credit establishment charges
- b. Energy-related charges, which include charges based on energy consumption and tariff schedules.
- c. Other applicable products and services charges, which include all other services billed by the SCE such as OBR charges.

A Customer's failure to pay any of the components (other than for master-metered residential properties) will subject the Customer to service termination as set forth in Rule 9.

Please note that, if SCE stops billing you for Loan or Lease Charges before the Loan or Lease is paid in full, you are still responsible for making loan or lease payments directly to the Financial Institution. Late payments may be subject to reporting to credit agencies by the Financial Institution.

4. **Overpayments.** Overpayments will be applied to the amounts due currently or in the future to SCE for energy charges and will not be applied to the Loan or Lease Charges. If you want to prepay Loan or Lease Charges, you must send the payment directly to the Financial Institution.
5. **Billing Inquiries and Disputes.** If you have any questions about your Loan or Lease or your Loan or Lease Charges, including any concerns that you may have been incorrectly charged, please contact the Financial Institution at the number shown in the Account Information section below. Any disputes about your Loan or Lease Charges must be resolved between you and the Financial Institution in accordance with your loan or lease documentation and applicable law. SCE will not be involved in resolving such disputes. Questions about the energy charges on your utility bill should be directed to SCE at the number shown on the bill.
6. **Transfer of Payment Obligation:** Responsibility to pay OBR Charges may be voluntarily assumed by the subsequent customer of record at the same location. You must first obtain the permission of your Financial Institution to assign your payment obligation to the next customer who occupies the same property where the improvements were installed. If the Financial Institution and subsequent customer agree in writing to assume the charges, the new customer must sign the "Authorization to Add Loan Charges to SCE Bill (Non-Residential)."
7. **Service Disconnection for Non-Payment of Loan or Lease Charges (Non-Residential Customers only):** You acknowledge that non-payment of your loan or lease charges will result in a disconnection of your utility service consistent with the rules that generally apply to non-payment of your utility bill, until such time that your Loan or Lease payments and your SCE charges are made current. Other rules for reconnection of service, including a requirement to post a security deposit, are set forth in SCE Electric Rules 7 and 11.
8. **Jurisdiction.** This Authorization at all times shall be subject to such modifications as the California Public Utilities Commission may direct from time to time in the exercise of its jurisdiction.
9. **Authorization to Release Information.** If you choose to participate in the On-Bill Repayment Pilot Program, you must also sign one additional form to allow the release of confidential information regarding your utility bill payment history: *Form 14-796 "Authorization To: Receive Customer Information or Act on a Customer's Behalf"* to provide the California Hub for Energy Efficiency Financing (CHEEF) and your Financial Institution authorization to access customer billing information.
10. **SCE not Liable for Improvements and Loan or Lease Process.** SCE is not involved in the improvements to your building, the assessment of potential benefits and costs associated with the improvements, or Financial Institution's procedures. You acknowledge that SCE does not accept any responsibility for the improvements, the anticipated energy efficiency or energy savings benefits, or other benefits, or for any aspect of the loan or lease process. SCE also disclaims any warranty including the warranty of merchantability or fitness for a particular purpose regarding any improvements. Any questions or claims regarding those matters should be directed to the Financial Institution or to the installation contractor.

**ACCOUNT INFORMATION**  
*(Please Print or Type)*

**CUSTOMER DETAILS<sup>1</sup>**

Name(s): \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Service Agreement Number: \_\_\_\_\_

**FINANCIAL INSTITUTION AND LOAN OR LEASE INFORMATION**

Name of Financial Institution: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Contact telephone number: \_\_\_\_\_  
 Loan or Lease Number: \_\_\_\_\_  
 Principal amount of Loan/Lease: \_\_\_\_\_  
 Estimated Monthly Payment/Duration: \_\_\_\_\_  
*[other identifying information]* \_\_\_\_\_

**SERVICE ADDRESSES INCLUDED IN THIS AUTHORIZATION:**

1	SERVICE ADDRESS	CITY	SERVICE ACCOUNT NUMBER
2	SERVICE ADDRESS	CITY	SERVICE ACCOUNT NUMBER
3	SERVICE ADDRESS	CITY	SERVICE ACCOUNT NUMBER

**By signing below, You hereby authorize SCE to add Loan Charges to Your utility bills for the Service Address(es) shown above.**

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AUTHORIZED CUSTOMER SIGNATURE	TELEPHONE NUMBER
-------------------------------	------------------

Executed this _____ day of _____	at _____
MONTH AND YEAR	CITY AND STATE WHERE EXECUTED

---

ADDITIONAL AUTHORIZED CUSTOMER SIGNATURE	TELEPHONE NUMBER
--	------------------

Executed this _____ day of _____	at _____
MONTH AND YEAR	CITY AND STATE WHERE EXECUTED

<sup>1</sup> If there is more than one customer of record for a Service Address, all customers must complete and sign this form.  
Form 14-938

Financial Institution Approval:

Financial Institution confirms that the Account Information shown above accords with its records.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
TELEPHONE NUMBER

\_\_\_\_\_  
COMPANY

Executed this \_\_\_\_ day of \_\_\_\_\_  
MONTH AND YEAR



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**EDISON**

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**Lisa Vellanoweth**  
Manager of Tariffs

February 10, 2014

California Public Utilities Commission  
505 Van Ness Avenue, Room 4005  
San Francisco, CA 94102

Attn: Tariff Unit  
Energy Division

Re: Substitute Sheets for Advice 2991-E and 190-G

Dear Energy Division Tariff Unit:

Enclosed are an original and one copy of Attachment A and Substitute Sheet Number 53939-E\* of Advice 2991-E and 1638-G of Advice 190-G. These documents are submitted to include a link to Form 14-796, Authorization To: Receive Customer Information or Act on a Customer's Behalf, as a footnote in the affected tariff sheets.

These substitute sheets are filed in accordance with General Order 96B, General Rules, Section 7.5.1 to make minor revisions to an Advice Filing prior to its requested effective date. Please include the enclosed sheets in your master Advice 2991-E and 190-G. If you have any questions, please contact Lisa Foulds at (626) 302-2010.

Sincerely,

A handwritten signature in black ink that reads "Lisa Vellanoweth". The signature is fluid and cursive, written over a white background.

Lisa Vellanoweth

Enclosures  
2991-E 190-G Sub.doc

cc: GO 96B

\* An asterisk denotes a substituted sheet.