



AUTOMATED DEMAND RESPONSE CONTROL INCENTIVES Program Handbook

TABLE OF CONTENTS

- 1. Introduction 3**
- 2. Automated Demand Response (Auto-DR) Overview 4**
 - 2.1 Auto-DR Control Incentives 5
 - 2.2 Demand Response Program Overview 6
 - 2.3 Examples of Demand Response Strategies 7
- 3. Auto-DR Process Flow 8**
 - 3.1 Customer Applies to Reserve Funds 8
 - 3.2 Reservation of Funds 13
 - 3.3 Program Verification Engineer (PVE) 14
 - 3.4 Technical Coordinator 14
 - 3.5 Customer Installs Equipment 15
 - 3.6 DRAS Participation / SCE Self Service Module 15
 - 3.7 DRAS Connectivity 15
 - 3.8 System Verification Testing (Commissioning) 16
 - 3.9 Installation Packet 16
 - 3.10 Licensing and Permits 18
 - 3.11 Technical Coordinator Training 18
 - 3.12 Quality Assurance 18
 - 3.13 Measurement and Verification (M&V) 18
 - 3.14 Express Control Incentives 20
 - 3.15 Customized Control Incentives 21
 - 3.16 Incentive Caps 23
 - 3.17 Participation in DR Events 24
 - 3.18 Large Customized Project Requirements 25
- 4. Additional Integrated Incentive Opportunities 26**
- 5. Contacts and Programs Information 27**

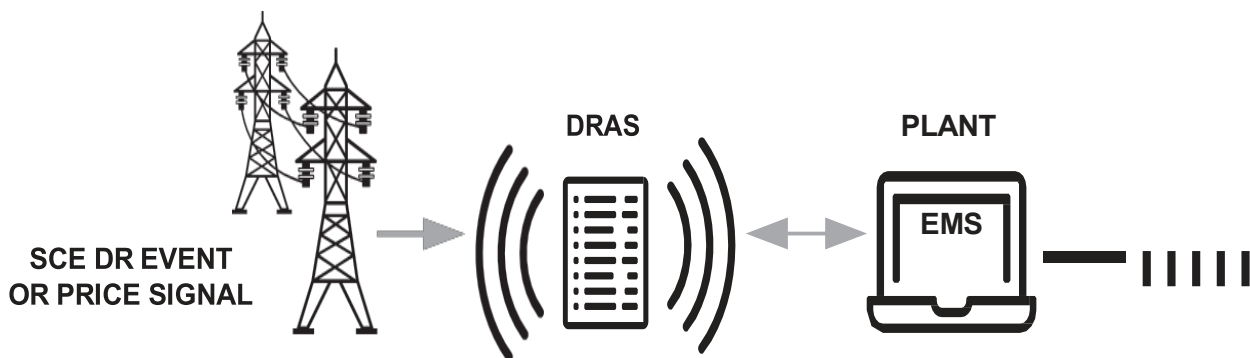


1. INTRODUCTION

These are the Program Guidelines for Southern California Edison's (SCE) Automated Demand Response (Auto-DR or ADR) Control Incentives Program. It explains SCE policies, procedures, and requirements for our qualified customers, DR Program managers and service providers, equipment manufacturers, trade professionals, and internal project staff. A trade professional is a third-party designated by the Customer that represents or acts on behalf of the Customer for the purpose of their Auto-DR project.

Auto-DR lets our Demand Response (DR) customers automatically apply the load reduction strategies they choose, so there's no need for manual intervention. The program also offers Control Incentives to non-residential customers. These incentives can offset the cost of installing qualifying Energy Management Control Systems (EMCS), also known as building management systems, which include HVAC controls, lighting controls, and process controls. EMCS helps automate a facility's participation in DR Events.

We have an array of DR Programs available. Our participating customers simply reduce energy use during peak demand periods. When they respond to an event by reducing energy, customers can earn financial incentives and other benefits. Participation in these programs can make a systematic and operational impact. They can improve the operation and reliability of California's electric system, as well as help reduce greenhouse gas emissions.





2. AUTOMATED DEMAND RESPONSE (AUTO-DR) OVERVIEW

Auto-DR is an “enabling technology” incentive program. It pays up to 100% of installation costs for a qualifying EMCS. Auto-DR enables communication with the customer’s EMCS so it can automatically respond to a DR Event or signal and launches the customer’s pre-programmed load reduction strategy. For example, instead of having to manually reduce lighting or HVAC at a facility, Auto-DR sends a signal from a central server (known as the Demand Response Automation Server or DRAS) to the EMCS.

The EMCS automates every step needed to lower the facility’s electrical load by sending a signal via the OpenADR 2.0 National Communications Standard. This is a worldwide adopted Internet protocol that’s used to connect with DR-related equipment, like EMCS. Our goal is to maximize the reliability and consistency of our DR Programs’ available kilowatt (kW) capacity. To do that, we make sure kW demand reductions during DR Events are realistic and achievable. Auto-DR is designed to make it easy for customers to participate consistently in as many DR Events as they want.

Depending on the DR Program, the enrolled customer is notified of an Event either one day before or on the day of the DR Event. When there is a DR Event, participants have three choices.

1. They can do nothing and participate.
2. They can choose to override their pre-programmed strategy and opt-out of the Event.
3. They can change their load reduction strategy for that particular Event.

By automating reduction plans, Auto-DR makes it easy to participate. But, it also gives customers the flexibility to alter their strategy or participation. We find this provides our customers and our team with more reliable, consistent results.

Auto-DR utilizes an open, interoperable, industry-standard control and communications technologies. These are designed to work with both common EMCS and individual end-use devices. Auto-DR’s technology and communications infrastructure originated from a conceptual design developed at Lawrence Berkeley National Laboratory (LBNL) in 2002.

Auto-DR's design is made up of two major elements built upon OpenADR, also known as an open-interface standards model. First, the DRAS sends event notification signals to participating DR customers. Second, a customer's dedicated client device maintains constant communication with the DRAS and links to the facility's pre-programmed load reduction strategies. This happens independently of control network protocols, such as BACnet and Modbus.

Honeywell provides the communications infrastructure (DRAS) and connectivity support for SCE's Auto-DR participants. They also maintain compliance with the OpenADR 2.0 National Communication Standards.

To receive Auto-DR Control Incentives, enrollment in at least one of the Qualifying DR Programs or rates below is required¹:

- Real Time Pricing (RTP) — Tariff / Rate
- Critical Peak Pricing (CPP) — Tariff / Rate
- Capacity Bidding Program - Elect (CBP-E) — Qualifying DR Program

Auto-DR Program case studies and fact sheets are available at on.sce.com/autodr

For information on our DR Programs, please go to sce.com/drp

2.1 Auto-DR Control Incentives

Customers can choose from two types of Auto-DR incentives:

1. **Auto-DR Customized Control Incentives** are available to medium and large commercial customers who install or retrofit an EMCS. The incentives offered by the program are either \$200 per kW of verified load reduction or 75% of total actual eligible project costs, whichever is less. Participants have two options for receiving incentive payments. Under the first option (Option 1) participants receive these incentives in two installments — 60% of the incentive after customer's DR enrollment and performance is verified, and then up to 40% if the customer participates in the program for at least 12 months. Customers selecting this option must remain enrolled in a qualifying DR program for 36 consecutive months (see section 3.15 for details). Under the second option (Option 2), participants receive 100% of the incentive up-front, upon verification and testing of the ADR control equipment. Customers selecting this option must remain enrolled in a qualifying DR program¹ for 60 consecutive months.

To qualify for Customized Control Incentives, customers must have a minimum of 30kW load reduction, per eligible service account, which is verified in a two-hour Measure and Verification (M&V) Test.

We use the customer's summer-specific baseline (CSSB) to determine the eligible available load (see section 3.13.1 Calculating Load Shed from System Test). For commercial and industrial customers applying for customized incentives, the control(s) must be onsite and able to communicate and demonstrate operability using the current OpenADR communication protocols and standards (currently OpenADR 2.0a or 2.0b).

2. **Auto-DR Express Control Incentives** use predetermined (deemed) kW savings on standard lighting and HVAC

¹ Qualifying DR Programs subject to change. In the event a program is no longer qualifying, a customer must enroll in another qualifying DR Program to remain in compliance.

technologies and measures. It applies to qualifying customers with a peak demand between 50 and 499kW (see section 3.14 for specific requirements). The Express Control Incentives are either \$300 per kW or 100% of total actual eligible project costs, whichever is less. Participants receive 100% of the approved incentive after equipment installation and validation.

2.2 Demand Response Program Overview

Auto-DR Program participants must be currently enrolled, or in the process of newly enrolling, and need to remain enrolled for 36-60 consecutive months, depending on the program and payment option selected (for Customized incentives). During that period, they have the freedom to switch their enrollment to a different Qualifying DR Program, but need to maintain active participation and achieve the program's required load reductions. If a customer does shift to another program, total kWh or kW nomination liabilities will be pro-rated and adjusted based on the time they participated in the previous program.

Here is a brief description of the current DR Programs available to Auto-DR participants, also known as Qualifying DR Programs:

1. **Critical Peak Pricing (CPP):** CPP is available to commercial and industrial customers and provides bill credits during the summer months. In exchange for the credits, SCE will call between 12-15 CPP events a year, when electricity demand and/or prices climb. During these events your energy charges will rise significantly. However, if you can reduce or reschedule your usage to off-peak times on a CPP event day, CPP may be a way to help lower your overall electric bill.
2. **Real Time Pricing (RTP):** RTP is ideal for businesses with a flexible operations schedule. RTP's rate benefits customers who can reduce energy during higher-temperature-based hours or shift that energy use to lower-priced hours. Except for holidays, RTP prices are set according to season, temperature, and time of day. Temperature-based hours are determined by the previous day's high temperatures in downtown Los Angeles. We receive this information from the National Weather Service. Participants can register for courtesy alert notifications to help them plan their energy use and maximize savings during an event.
3. **Capacity Bidding Program – Elect (CBP-E):** CBP-E is an Internet-based program that helps sustain the electrical grid when demand is at its highest. An aggregator submits monthly nominations (aka: "bids") for the customers it registers to lower their energy use during events and receives compensation in return. The payment is based on their actual energy reduction during a CBP-E event. The program is flexible, giving aggregators the freedom to adjust their bid and their customers' participation preferences every month. Participants are notified the day before a scheduled event.

2.3 Examples of Demand Response Strategies

Most of our commercial DR customers use DR control strategies for HVAC and lighting loads. Industrial customers typically adjust their process loads to accommodate events. The control strategies used most frequently include:

- **Global Temperature Adjustment:** Customers adjust their EMCS to receive the DR Event signal from our DRAS. The temperature change is pre-programmed to raise (typically four to six degrees) by the customer. When the signal is received, the EMCS increases the set-point temperature to the pre-programmed preference for a set period of time.
- **HVAC Equipment Cycling:** Facilities with multiple packaged HVAC systems benefit from the HVAC cycling method. Customers configure select units to receive a DR Event signal from our DRAS. When a DR Event is called, the signal is received, and Auto-DR shuts off compressor units in parts of the building's systems. The compressors stay off for a reasonable amount of time, until we send another signal. Then, those units restart, and other compressor units shut off.
- **Other HVAC Adjustments:** Other HVAC shed strategies include decreases in duct pressure, auxiliary fan shutoff, pre-cooling, valve limits, and boiler lockouts.
- **Light Shutoff or Dimming:** Lighting circuits can be wired to receive DR Event signals from our DRAS. When a signal is received, Auto-DR shuts off or dims the lighting throughout the DR Event. Customers typically choose to dim/shut off lighting in common areas that get enough natural light or lighting from other areas to sustain a safe environment.
- **Other Lighting and Miscellaneous Adjustments:** Other shed strategies include bi-level lighting switches and motor/pump shutoff.
- **Process Adjustments:** Since industrial processes vary in nature, customers tailor a strategy for each process. When it comes to Auto-DR, customers usually modify secondary processes that have a lot of storage available. In these cases, the equipment can be completely shut down during a DR Event. They can then catch up on production later that day or the next.



3. AUTO-DR PROCESS FLOW

The Auto-DR Process Flow explains the procedure and documentation needed for each step of the program. To help ease the process, customers must review and comply with all rules and submit a signed Program Application. Once a customer has submitted a Program Application and SCE has verified eligibility, SCE can then enroll the customer into the relevant program.

Participating Auto-DR Control Incentive customers should provide access to facilities and data to us and our contractors. Customers need also demonstrate progress toward Auto-DR project milestones.

Customers must complete the application package in full before a project is approved and funds are reserved. We pay incentives only if all the program documentation is complete and satisfactory.

3.1 Customer applies to reserve funds

Customers can apply for incentives through SCE's Trade Ally Community Portal at <https://sce-trade-ally-community.force.com>. The application must include:

1. Third-Party Project Proposal or Scope of Work (SOW) with detailed calculations and project plans
2. Detailed Controls System Diagrams (must have at least one DRAS client or device installed for each service account or location) showing at a minimum all OpenADR compliant devices.
3. Detailed process or procedures and any required devices to meet the Stranded Asset Test.
4. Preliminary itemized equipment costs included in the Auto-Dr Scope of Work

3.1.1 Customer eligibility

Non-residential customers who meet these requirements can participate in Auto-DR:

- Customer is an active SCE customer and has a valid and active utility service account with SCE in good standing.
- Customer has an Edison SmartConnect® or another interval meter installed at their project site²
- Customer has an existing utility service account with at least 12-months of billing and on-peak usage history. Intermittent loads (i.e. pumping or agricultural irrigation) need 36 months of billing and on-peak usage history. The on-peak period is defined in the customer's rate or program schedule.
- Customer is enrolled in a Qualifying DR Program (see section 2.2) or will be enrolled in a Qualifying DR Program before the M&V Test.
- Auto-DR Customized Control Incentive customers must have a minimum of 30kW of eligible available load per service account to qualify for Control incentives. We calculate available and eligible load through a customer's summer specific baseline (see section 3.13.1 Calculating Load Shed from System Test).
- Customer should not have any pending or recent Bankruptcy proceedings.

3.1.1.1 Direct Access (DA) and Community Choice Aggregation (CCA) customers

DA and CCA customers who purchase power from electricity service providers (ESP) other than SCE can still enroll in Auto-DR, unless their ESP or CCA offers its own Auto-DR response program. Like all Auto-DR participants, they'll need to actively participate in a Qualifying DR Program. Here are the available Qualifying DR Programs:

- Capacity Bidding Program - Elect (CBP-E)

DA and CCA customers must have an SCE meter and have SCE as their Meter Data Management Agent (MDMA), because we rely on the meter to validate the M&V Testing and to confirm the second installment bonus payment, where applicable (see section 3.15.2). DA customers who don't use our SCE meters or our MDMA may be responsible for their entire project costs. To avoid this scenario, DA customers can purchase an Edison SmartConnect meter through their SCE Account Manager.

3.1.2 Auto-DR Project eligibility

A project is eligible for Auto-DR incentives if its equipment can be controlled through an EMCS or other control system. Even if a project's automation system needs additional equipment or programming (e.g. control modules, rewiring, dedicated switches, etc.), it is still eligible for Auto-DR incentives. That's because the system can connect to our Demand Response Automation System (DRAS) and receive DR Event signals. As long as no manual action is needed to start a load reduction strategy, we consider it Auto-DR.

² A customer's project site is defined as a single, free-standing building or structure; an individual utility interval meter; or a service account number where the retrofit or installation takes place.

To be eligible for Auto-DR Program incentives, a project must meet the following criteria:

1. Feature new Auto-DR-enabling equipment that provides gradual kW and kilowatt hour (kWh) reductions that correspond to baseline equipment.
2. New equipment/systems shouldn't already be installed.
3. Equipment must have OpenADR 2.0 capability and be certified by the OpenADR Alliance
4. The customer should own or occupy the project sites. SCE does not provide Auto-DR incentives for projects at newly constructed sites.
5. Applications must be submitted through SCE's Trade Ally Community Portal at <https://sce-trade-ally-community.force.com>.
6. The customer needs a unique service account number for each site.
7. Any project sites on the customer's incentive applications must be within SCE service territory.

California's Investor Owned Utilities (IOUs) require location-specific notification for all of our DR Event participants — both existing and new customers. If participants enroll multiple facilities at multiple sites, that customer must have a client/device (or equivalent) for each facility or site because they need to have the ability to receive and respond to DR Event signals. Also, the customer should monitor DR Event participation for each individual site or measure, based on the site address and service account.

3.1.2.1 Double-Dipping

Customers that receive Control Incentives through the Auto-DR Program may be ineligible to participate in some SCE and non-SCE programs for 36-60 months so as not to receive overlapping incentives. Customers should contact their SCE Account Manager or the Customer Contact Center to ensure program eligibility.

Neither a Customer nor its trade professional may apply for or receive any rebates, incentives, or services for the same product, equipment, or service from any other utility or third-party program, including but not limited to the Self-Generation Incentive Program, California Solar Initiative, or any other similar programs.

Customers cannot receive any funds from any other energy conservation or energy efficiency program funded by the California Energy Commission or the CPUC for the same product, equipment, or services for which Customer receives incentives from any Auto-DR Program.

In addition, Customer shall not enroll in any demand response portfolio intended to fulfill obligations of any agreement signed as a result of SCE's Preferred Resources Pilot RFO, SCE's Local Capacity Requirements RFO, the Aliso Canyon DR RFO, or any other future DR RFO solicitations, unless explicitly exempted, for any service account for which it applies for or receives Auto-DR incentives.

If a Customer violates the requirements in the preceding paragraph, Customer must, at SCE's request, refund the Control Incentive already paid by SCE to Customer. The Customer will be solely responsible for paying the refund to SCE. SCE has no right or obligation to seek the refund from the Customer's trade professional or any other third-party. SCE has no obligation to resolve disputes between the Customer and their trade professional.

3.1.2.2 New Vendors and Controls

Any new vendor or Auto-DR control's DR capability should be verified by program staff and PVE or Technical Coordinator (TC).

A. Technology must be evaluated in an independent assessment

Or

B. Technology must be currently installed and available for evaluation by our program staff. The review should be performed either in SCE territory or somewhere that can be easily accessed by our program staff. The location should allow us to document or verify both pre- and post-project conditions.

3.1.2.3 Ineligible projects

Projects that are ineligible for Auto-DR incentives include supply or load shifting projects such as on-site electric generation, thermal energy storage systems, battery storage, and others. Incentives for these projects are available under separate programs.

Auto-DR incentives are also unavailable for semi-automated measures, manual DR measures, manual improvements/replacement of existing equipment, or changes to the way customers use existing equipment. This also applies to cameras, software license(s), maintenance fees, recurring costs, overhead costs, and metering costs at the site or facility.

3.13 Third-party DR providers (Aggregators)

Capacity Bidding Program – Elect is an eligible program for customers who prefer third-party providers (aggregators). Customers enrolled in CBP-E are required to have M&V Testing to verify load reduction.

Auto-DR customers enrolled in CBP-E with an OpenADR 2.0 certified virtual end node (VEN) aren't eligible to receive Auto-DR signals from their aggregator for M&V Testing. Instead, they need to pull the Auto-DR signal directly from the DRAS. This action ensures the system is automated with all DR Programs. It also paves the way for DR services like fast DR and creates flexibility to accommodate our electric grid. After the M&V Test is completed, they can trigger the customer's EMCS directly to launch the automated load reduction.

The aggregators are responsible for each service agreement's nominated load. And they assume any risk/penalty if a customer fails to shed the required load. It's the customers who need to check that their load is nominated monthly. When an event is called, they need to participate to their tested kW. For customized projects who will be paid under payment Option 1 it is vital that those with an aggregator participate in these events for the first 12-month period. That's the only way to stay eligible for the 40% participation bonus (see section 3.15.2).

3.14 Stranded Asset Training

As a safeguard, SCE requires stranded asset testing for all projects and outsourced Auto-DR systems. We want to ensure the local VEN can communicate with our DRAS without the vendor or their cloud system. This type of testing is typically performed with the Trade Professional after reservation of funds but prior to the incentive payout. This enables us to verify it connects directly with our DRAS. Vendors that cannot pass the cloud-based project eligibility or stranded asset testing may connect to our DRAS but will not be eligible for our Auto-DR incentive.

During stranded asset testing, the Auto-DR Team initiates an event notification signal from our DRAS. We make sure as the signal transmits to the onsite VEN, a local host that is OpenADR 2.0 certified (such as an EMS). It does not go through the cloud. We conduct this test once per VEN or project. However, additional demonstrations can be ordered at any time if circumstances have changed due to hardware or software updates, etc.

With cloud-based Auto-DR projects, a remote server (an EMS) is the communication hub. That's where our DRAS signal for a DR Event is sent. When the EMS receives that signal, the customers' DR strategies launch and activate at facilities across a campus or region. These projects are popular with Auto-DR Express technology vendors, energy service providers, and aggregators for a few reasons:

1. They have attractive cost efficiencies
2. They use central servers instead of localized servers

They have controls at individual facility sites. All Auto-DR projects may create stranded asset risks if a customer becomes disconnected from the cloud or ends their relationship with the cloud vendor or equipment manufacturer and their cloud service or the Demand Response Aggregator/TradePro.

To manage the stranded asset risks, vendors and aggregators for all Auto-DR project must meet these requirements:

1. DR Event initiation and termination communications between DRAS and the cloud must follow the OpenADR 2.0 protocol.
2. Vendors need to give customers and our team written instructions about the local VEN. We need to know how to reconfigure the VEN or local host, that is OpenADR 2.0 certified to pull a signal directly from our DRAS. With proper configuration, we can direct the equipment to automatically respond so the DR strategies activate even without the cloud.
 - A. During the project installation, the vendor should install additional hardware and provide programming services to the customer. These services are eligible for Auto-DR incentives.
 - B. The additional hardware will be similar in construction. For example: if the main VEN is built for an outdoor environment, any additional hardware will be designed for the same.
 - C. The vendor's instructions and hardware should allow us to redirect the VEN's connection to our DRAS with no outside assistance (e.g. no passcodes, etc.).
 - D. All future revisions to the hardware/software must retain the standalone capability.
3. The site's VEN must include the proper security certificate for connection to our DRAS. It should also be able to connect to OpenADR 2.0 (the 1.0 endpoint is not allowed).

4. Any functions related to reduction loads for Auto-DR incentives need to be saved — even without the cloud. Clouds typically offer control intelligence. But standalone equipment must have default programming in case the vendor's cloud service falters; that is the only way to achieve the load shed level approved for our Auto-DR incentives.
5. Only customer sites with a peak demand **below 200kW** are eligible to receive incentives for cloud-based controls. **Larger sites must have a full physical OpenADR 2.0 client on-site to receive Auto-DR incentives.**

Auto-DR can be outsourced but still owned by the customer. In these cases, the Auto-DR system is deeply integrated into the customer's EMCS. Ending the vendor relationship would make it impossible to operate the management and control system.

However, when customers outsource the Auto-DR system, it can cause a stranded asset risk for us. That's because the functionality of DRAS connections is not dependent on a third-party vendor. We need to ensure the customer's control system has locational dispatch capabilities; that is a requirement for all Auto-DR executions.

3.2 Reservation of funds

When a customer or their trade professional submits an application (see <https://sce-trade-ally-community.force.com>), we'll review the application and take one of two actions: reserve the incentives or reject the application.

First, a Program Verification Engineer (PVE) will conduct an evaluation. The customer's incentive reservation will be based on those results and a kW review. Our Auto-DR Team may also conduct a pre-inspection for any project. This is done in addition to a trade professional's prior audits and site visits.

After the incentive reservations are approved, we submit the Auto-DR application for processing. Once those actions are complete, the customer is considered a program participant. The Auto-DR Team will provide written notice of the incentive reservation to the customer/or their trade professional and their SCE Account Manager. At that point, the customer can begin installation.

If the customer is ineligible and the incentive is not reserved, we'll record the rejected application. Then, a project rejection notice will be sent to the SCE Account Manager and customer or their trade professional.

Note: If the project scope changes after we approve an Auto-DR application, SCE reserves the right to cancel the current application. The customer can then resubmit a project with a new application using the most recent program guidelines. They also have the option of applying for change only, if applicable.

Funds are reserved for 12 months from the date written notice of approval is sent to the customer, trade professional, or SCE Account Manager. If the project can't be completed within that 12-month period, SCE reserves the right to cancel the project. Any extension requests will be approved on a case-by-case basis, if enough evidence is provided to show that progress has been made on the installation.

We may request proof of progress at any time during the reservation period. If proof of progress is not provided to our satisfaction, we reserve the right to terminate the Auto-DR project.

3.2.1 Reservation period and early withdraw penalties

Customers are required to stay enrolled in a Qualifying DR Program for 36-60 consecutive months, depending on the program and payment option selected (for Customized incentives). If Customer fails to comply with any Auto-DR Program requirement(s), including, but not limited to, the requirement that Customer's service account(s) remain continuously enrolled and participating in a Qualifying DR Program for 36-60 months, or if Customer simultaneously enrolls in a non-qualifying third-party DR Aggregator Managed Portfolio (AMP) program such as the Local Capacity Resource (LCR) or the Preferred Resources Pilot (PRP) or any other future similar third-party programs, then SCE is entitled to a refund from the Customer of a prorated amount of the Control Incentive already paid by SCE to Customer.

This also applies when a customer's service account closes before the 36 or 60-month period ends. The Customer will be solely responsible for paying the refund to SCE. SCE has no right or obligation to seek the refund from the Customer's trade professional or any other third party. SCE has no obligation to resolve disputes between the Customer and their trade professional. The refund will be a pro-rated portion of the Auto-DR Control incentive.

For those selecting customized incentive Option 1, Incentive Payment 2 (IP2) is a participation bonus. The amount is based on the first year of program participation (see section 3.15.2). The pro-rated portion of the Auto-DR incentives stems from Incentive Payment 1 (IP1).

$(36 \text{ Months} - \text{Number of months fulfilled or enrolled in a Qualifying DR Program}) / 36) * \text{Total Incentives Paid in IP1} = \text{Balance Due}$

3.3 Program Verification Engineer (PVE)

After we receive an Auto-DR project proposal and application, a PVE conducts an evaluation of the submitted report. The goal is to review and evaluate the proposed DR strategies. We need to make sure these strategies are in line with the engineering calculations that estimate the plan's kW reduction. The PVE may ask the trade professional or participant for clarification or additional information as a follow-up.

The PVE and Auto-DR Program manager may adjust the proposal to maximize success. They often modify the kW load shed potential and eligible incentives that are in the original project proposal. The program's goal is to achieve the highest level of reliability and consistency when it comes to kW-enabled Auto-DR. Making sure the kW load shed potential for Auto-DR incentive projects are achievable inspires customers to keep participating in DR Events.

After the PVE evaluates a proposal, the adjusted kW may be lower than the initial kW. If that happens, the Auto-DR Team notifies both the customer or their trade professional and their SCE Account Manager of the findings in a reservation review report.

3.4 Technical coordinator assigned

After the reservation of funds is requested and confirmed, a Technical Coordinator (TC) can be assigned to the project at the customer or trade professional's request. The TC is contracted by SCE and costs are paid directly by the Auto-DR Program.

The TC's function is to support customers during installation to ensure a reasonable timeline for completion.

While support services are limited, a TC is available to answer any technology-related questions. When it comes to Auto-DR Control Incentives projects, our Auto-DR Team will not supervise, direct, or otherwise control construction or installation work. We will also never purchase equipment, material, or supplies for permanent incorporation into buildings or job sites that are related to Auto-DR incentive programs.

3.5 Customer installs equipment

Once funds are reserved, a customer has 12 months to complete the project and submit the installation packet.

3.6 Customer requests DRAS participant (login) information through our Self-Service Module

Before submitting the installation packet, customers should request their DRAS login credentials. They can receive these through the Self-Service Module (SSM). Our Auto-DR Help Desk will give a unique Username and Password to each service account that is participating in Auto-DR and has an EMCS.

To sign in using the DRAS credentials, go to sce.openadr.com.

For questions regarding the DRAS credentials or for help signing in, contact the Auto-DR Help Desk at AutoDR@sce.com or call **1-866-238-3605**.

3.7 SCE connects equipment to the DRAS

To connect the client device to DRAS, the TC and trade professional use the login credentials from the Auto-DR Help Desk.

Our Auto-DR Team is the primary communication contact for the customers. We support and coordinate with our vendor, Honeywell, to conduct continuous DRAS connectivity testing. The team monitors the site's connectivity to make sure the DRAS server is working properly and that it stays connected to the customer's operation. The testing also ensures if there are connectivity-related performance issues, they're addressed immediately.

3.7.1 Monitoring DRAS function

Honeywell is responsible for maintaining the DRAS and keeping the connectivity strong. But, our Auto-DR Team also monitors the system, ensuring maximum up time and a quick response to service outages. The automated testing framework "pings" the DRAS from different locations. It then notifies our Auto-DR Team of significant outages. We inform other SCE program staff about the outages and follow up with Honeywell to ensure service is restored.

3.7.2 Customer connectivity and non-invasive testing

Part of the DRAS's functionality is to alert Honeywell, SCE, and the customer when connectivity is lost with a client device. Since our Auto-DR Team is also notified, we work directly with the customer and Honeywell to find the connectivity issue. To find the source, we use non-invasive testing. This type of testing partly relies on the DRAS's monitoring capabilities. Sites that lose their connection often are flagged for follow-up. When a problem can't be addressed remotely, a technical team is sent to trace the source of the issue. There are some sites that have intermittent connectivity because of internal network configurations. Even though they're sufficiently connected, they may appear to experience brief outages. In these situations, our

Auto-DR Team monitors those sites and adjusts notifications to launch when connectivity is best.

Annual tests are another way to check connectivity. When issued, they poll DRAS at all existing sites. The goal is to find any sites that fail to respond to an event signal. The poll is achieved through the customer's EMCS, which grabs the DR Event notification. This is considered "non-invasive" because the DR Event is cancelled before it can initiate reduction strategies.

3.8 Customer and trade professional conduct system verification testing to verify DRAS communication

In addition to verifying DRAS communication, the customer should also pre-test (commission) the site. The purpose is to verify functionality and load reduction capability.

If the M&V Test is unsuccessful at verifying load reduction, the customer is responsible for any retest costs, unless SCE has determined the failure was not caused by the customer or their trade professional. Any additional M&V retest costs will be deducted from the customer's eligible incentive. For Customized projects, the total cost of additional M&V retest(s) will be deducted from IP1.

3.9 Customer submits installation packet

The M&V Test request documents include the following:

- Customer Agreement for Auto-DR Control Incentives
- Technical Coordinator Installation and Customer Enablement Form for Auto-DR Control Incentives (if applicable)
- Installation Report
- Project Invoices

Customers must include invoices of expenditures in the Installation Packet. The invoices must be sufficiently detailed and show cost categories, such as quantity, cost, rate, rate-hours, materials, raw materials, labor, time sheet receipts, purchases, contractor, sub-contractor, and more. Invoices should be dated no earlier than the submission date of the application. SCE will not pay for any project costs incurred before the application submission.

Grouped line items are not allowed. The invoices should also be itemized and list everything separately. An Invoice Requirements Checklist is provided in section 3.9.2.

Costs should be itemized so our Auto-DR Team can verify the installation of major equipment components. The more complex the project, the more precise the invoice documentation needs to be.

3.9.1 Change in project scope

If the project scope changes dramatically after SCE has reviewed and approved the initial scope, the customer may be required to resubmit a project application. Substantial changes include large modifications to proposed equipment types, sizes, quantity, or configuration. Expansions that include additional retrofits also fall under that umbrella.

Once the project scope and calculations are revised, it will be subject to another review. It may also require a new agreement before equipment/systems can be removed or installed. Under reasonable circumstances, and based upon our discretion, we may grant exceptions in some cases.

3.9.2 Checklist for Invoice Requirements

All invoices must be uploaded to iEnergy

Invoices should include:

- ✓ Label stating the document is an invoice
- ✓ Date of submittal
- ✓ Trade professional contact name, job title, contact information and address or Contractor Name
- ✓ Site Number
- ✓ Reference to PO number (if available, place the Contract number below the PO number)
- ✓ Invoice #
- ✓ Page # of Invoice #
- ✓ Contract Summary: Contract value (not to exceed amount), invoiced charges to date plus contract or P.O. balance
- ✓ Labor cost details (only costs that enable direct Auto-DR installation and operation are eligible). Itemized invoice consistent with contract and payment terms.
 - In-house labor: Include hourly or per unit rate (whichever is applicable). Make sure the rate is consistent with the contract, as well as corresponding quantities and current charges. Include dates and description of work performed.
 - Non-in-house labor: Hours for each classification of work³ (management, programming, etc.)
- ✓ Parts and materials (only costs that enable direct Auto-DR installation and operation are eligible)
- ✓ Line items for all major purchases
 - Purchases over \$5,000 per line item will require supporting documentation as will any manufacturer warranty costs (reimbursed up to 2%)
 - Manufacturer warranty costs require supporting documentation (reimbursed up to 2%)
 - Sub-Contractor invoices (if applicable)

Parts and Labor not covered:

- ✓ Leasing/Leased equipment
- ✓ Refurbished equipment
- ✓ Overhead and indirect labor costs (i.e., labor and overhead costs for any cloud-based server to receive the utility DRAS signal are excluded from the Auto-DR Control Incentive Policy Program)
- ✓ Manual (non-automated or semi-automated) improvements to or replacement of existing equipment
- ✓ Cloud portion of the cloud-based controls (i.e., including programming labor costs, software licensing fees)
- ✓ Metering or telemetry equipment
- ✓ Service contracts
- ✓ Recurring costs (ex. DSL lines, monthly or annual subscription fees)
- ✓ Customer equipment (new or replacement)
- ✓ Construction costs
- ✓ Battery controls
- ✓ Batteries

Note: SCE reserves the right, at its sole discretion, to deny any costs for a project that SCE deems unreasonable.

³ Timesheets and actual receipts are not required for each invoice submission. However, the contractor should be prepared to provide all supporting documents to substantiate the invoice costs if requested.

3.10 Licensing and Permits

Customer is responsible, at its own expense, to obtain and maintain and cause contractors and/or subcontractors to obtain and maintain, licenses and permits required by federal, state, local, or other relevant governing or regulatory bodies needed to perform Program work.

If applicable, customers must provide certification they are not required to obtain a permit. To provide proof of permit closure, customers (or trade professional) must include documentation from the authority having jurisdiction (e.g., local permitting office) that includes the permit number, customer name, address, and an indication that the permit has been closed and/or is final.

3.11 TC completes customer DRAS training and obtains customer signature for the “Technical Coordinator Installation and Customer Enablement form

After confirmation of communication with the DRAS, the customer may complete and sign the “Technical Coordinator Installation and Customer Enablement Form “. This form is required before an Auto-DR profile can be assigned.

The TC’s signature on the form confirms the following:

- The customer is online and communicating with the DRAS
- The customer is requesting an M&V date 2-4 weeks in advance

3.12 Quality assurance

A Quality Assurance (QA) review requires completion of all forms and documentation, and does the following:

- Verifies customer’s Qualifying DR Program enrollment (prior to requesting M&V) and DRAS communication
- Adds Auto-DR profile to our business system and enables appropriate controls in the DRAS
- Confirms the customer is actively participating in DR Events through Auto-DR

3.13 Measurement and Verification Test

The PVE will review project data prior to performing the Measurement and Verification (M&V). After the review, the customer will be contacted to setup the M&V Test. Before the test gets underway, the customer needs to be online and communicating with the DRAS for 48 consecutive hours.

An inspection and two-hour M&V Test are scheduled once commissioning is done, and installed equipment is working. The PVE will plan these tasks within a specific time period/parameter, choosing a convenient time for both the customer and trade professional.

Before the inspection begins, the PVE will review test expectations with the trade professional. The inspection should verify the following:

1. Automation controls are located and verified for proper installation and connection to the related equipment. Photos are taken.
2. Pre-test site conditions are verified to the proposed measures. The PVE may record observations of foot-candles, temperatures, motor frequencies, and more.

3. Energy efficiency measure installation is verified for Integrated Demand Side Management (IDSM) projects. Photos are taken.
4. The PVE documents the test's start-time. The test lasts approximately two hours. If there's a problem initiating the test, the PVE, customer, and trade professional will try to find the source of the issue. A second test may be required. Since each test is unique, it may or may not be necessary for the PVE to remain at the site for the duration of the test.
5. A second set of observations may be made during the test. This is to verify the site conditions after the sequence of operations (the same observations as pre-test conditions apply). Photos are taken.
6. The PVE also notes any comfort or safety issues that could arise during the test. For example, curtailed equipment may make some areas too dark or too hot.
7. The inspection ends after the second set of observations are complete and no other potential issues are noted during the test. The test's observations are then compared to interval data recorded during the test period. This establishes the site's verified load reduction.

The PVE then sends the M&V Test results to us by filing the "Measurement and Verification Report".

3.13.1 Calculating load shed from system test

We provide the following information to explain how we determine the customer's load reduction. Each situation is unique, and not all testing facilitates using these methods. The Auto-DR Program staff will examine all reasonable options when evaluating test results.

To tally reductions resulting from a test event, we can only use utility revenue meter data. The incentives and load shed that we calculate after a site verification testing depends on the accuracy of the customer baseline (baseline is the hourly load the facility would have used without a DR Event). The actual load during the DR Event is subtracted from the calculated baseline for each hour. The program incentive is based on the average kW performance for each hour of every event.

Our DR Programs each have their own baseline calculation strategy. During testing, the baseline can vary a lot. That variation depends on conditions during testing in comparison to typical summer daytime activity. The PVE is aware of this and can adjust the baseline to account for these seasonal fluctuations.

Auto-DR defines a baseline calculation methodology to determine program incentives.

- Hourly Customer Summer Specific Baseline (CSSB): The CSSB is the hourly summer average kW for summer weekdays, non-holidays, and non-Event days. It's used with the 10-in-10 Baseline to help determine the customer's weather-dependent, demand reduction for a test event.
- 10-in-10 Baseline: The 10-in-10 Baseline is determined using a 10-day rolling average energy use profile of the last 10 similar days before a test event. It's calculated on an hourly basis from 4 p.m. to 9 p.m. and uses the average of the same hour for the past 10 similar days. The 10-in-10 Baseline includes Monday through Friday and excludes holidays and days when the customer was paid to shed load on an interruptible or other reduction program. It also omits days when the customer endured rotating outages. The 10-in-10 Baseline may vary for each hour and each event.
- Recorded Test Energy (RTE): The RTE is the customer's actual recorded kWh of demand during a test event.

- Calculated Reduced Energy (CRE): CRE is calculated by subtracting RTE from the Applicable Baseline. Adjustments can be made for seasonal load variations.
- Incentive Payment (IP): The IP is based on the average CRE calculated during the test event, multiplied by the incentive level per kWh/hour.
→ $IP = CRE * \text{applicable incentive level}$

The scheduling of the customer's initial test varies, depending on a few factors:

- The timing of the installation of specific measures
- Availability of processes and personnel
- Seasonal schedules
- Availability of test personnel to schedule the tests at the customer's site

With that in mind, the schedule of a test could happen during mild conditions or at the height of summer. If testing occurs when it's mild out and HVAC loads are low, the initial test results will be adjusted. This is to account for reduced DR-potential that results from cooler weather. Adjustments can also be used for gauging non-weather-related loads that may not be accurately represented under the CRE method. This determination is made on a case-by-case basis.

A customer's energy loads are all looked at closely to ensure consistency and confirm there is no diminished load, also known as a large reduction in available capacity. If we detect a diminished load, we will adjust the baseline.

However, if the customer's project fails the inspection and testing, their application may be declined. Sometimes multiple site inspections are needed. If that happens, the customer may need to pay re-inspection fees. SCE reserves the right to modify or cancel the incentive amount if the actual solution installed differs from the installation as set forth in the application.

3.14 Auto-DR Express Control Incentives

Auto-DR Express uses fixed DR (kW) savings for standard technologies and measures.

Customers who select Auto-DR Express could qualify for incentives up to 100% of project costs or \$300 per kW of "predetermined" load reduction, whichever is less.

Express incentives are not calculated using the summer-specific baseline or the 10-in-10 Baseline.

Incentives are based on:

- The customer's maximum kW (demand), using their most recent 12-months of usage
- Predetermined (deemed) savings in 25kW increments
- Facility Type
- Climate Zone (ZIP code)

Incentives are paid in full after the project is completed and equipment undergoes a two-hour verification and demonstration event.

Predetermined kW savings for standard technologies:

- Lighting controls: 20%, 30%, or 40% reduction
- Temperature reset controls for HVAC: 4°F

Or

- Duty-cycling of HVAC compressors and supply fans: 20 minutes (for offices and food stores)
- Duty-cycling of HVAC compressors and supply fans: 20 minutes (for retail only)

Qualifying Customers (based on California End Use Study — CEUS):

- Office 50-499kW
 - ✓ (Daycare, churches, and sales offices under 100,000 sq. ft.)
- Retail 50-499kW
 - ✓ (Stores in strip malls and studios or galleries)
- Food Stores 100-250k
 - ✓ (Convenience stores, including those at gas stations and liquor stores, as well as fast food restaurants)

To qualify for Express control incentives, customers must remain enrolled in an eligible DR Program for at least 36 consecutive months.

3.15 Auto-DR Customized Control Incentives

Customized incentive participants have two options for receiving incentive payments. Under the first option (Option 1), participants receive these incentives in two installments — 60% of the incentive after customer's DR enrollment and performance is verified and then up to 40% if the customer participates in the program for at least 12 months. Customers selecting this option must remain enrolled in a qualifying DR program for 36 consecutive months. Under the second option (Option 2), participants receive 100% of the incentive up-front, upon verification and testing of the ADR control equipment. Customers selecting this option must remain enrolled in a qualifying DR program for 60 consecutive months.

Customers who submit Auto-DR Customized incentive applications should have a minimum of 30kW of eligible load to qualify. We determine available and eligible load using a customer's summer-specific baseline (see section 3.13.1 Calculating Load Shed from System Test.) Those who take advantage of the Auto-DR Customized option could qualify for incentives up to 75% of project costs or \$200 per kW, whichever is less. For payment Option 1, Auto-DR participants earn 60% of the total program incentive in the first installment. This depends on verification of eligibility, installation of qualifying DR measure(s), and M&V of on-peak load reduction (kW) potential from their installed, qualifying DR technology.

3.15.1 Payment Option 1: Installment Payment 1 (IP1): 60% of approved incentive amount after installation and M&V.

Approved incentive amount (\$) is the lesser of one of the following:

1. \$200 x M&V Load Reduction (kW)
2. 75% x (actual and reasonable) cost for installation and purchase of qualifying equipment

The second installment is the participation bonus. Participants may receive up to 40% of the remaining incentive. Customers must actively participate for the entire 12-month period to be eligible for the bonus. Throughout the first 12 months, customers also need to achieve an average participation greater than 60% of the verified kW reduction.

The second installment participation bonus is determined by calculating the difference between the actual percentage performance and the 60% benchmark. The result is then multiplied by the total Auto-DR incentive amount. The incentive amount is never less than zero, and never more than either the project cost or the project's approved incentive. This applies even if actual performance exceeds 100% of verified kW.

The calculation of average kW performance is based on DR Events, even if a customer opted out of an event. In these cases, DR Event opt-outs are regarded as zero kW performance. Since Auto-DR incentives support customers' investments in DR-enabling controls, it's important to actively take part in every event.

3.15.2 Payment Option 1: Installment Payment 2 (IP2 or Participation Bonus): Bonus of up to 40% of approved incentive amount based on DR performance during the first 12 months after incentives are paid.

$(\text{Average DR Participation (kW)}/\text{M\&V Load Reduction (kW)}) - 0.6 \times \text{Approved Incentive Amount (\$)}$

$\text{Average DR Participation (kW)} = \text{Total Consumption Reduction for all events (net kW)} / \text{Total eligible event hours (h)}$

The total Approved Incentive Amount is based on M&V of the load reduction by a third-party engineer

To qualify for incentives under payment option 1, the customer must remain enrolled in a Qualifying DR Program for at least 36 consecutive months (see section 2.2)

40% Participation Bonus (IP2) after verification of eligibility

Customers' Auto-DR Control Incentive history determines if they have completed the 12-month participation period.

The 12-month participation period begins when the IP1 (60%) is approved for payment.

- To be eligible for IP2, the customer must average greater than 60% participation across all eligible Events or in a Qualifying DR Program.
- If no DR Events occur, a second M&V Test is required to validate equipment performance and available load shed.
- Customers are responsible for monitoring their performance during the first 12 months of participation.

A final performance report is created after a customer completes one year on a Qualifying DR Program.

Once the report is finished and approved, the Auto-DR Team sends the IP2 to the Accounts Payable department. Final incentives are paid one year after the IP1 incentive date.

Installment Payment 1

Amount: 60% of your approved incentive amount
Timing: After installation and measurement verification

Installment Payment 2: Participation Bonus

Amount: Bonus of up to 40% of your approved incentive amount
Timing: Based on your DR performance over the first 12 months

Participation Bonus Calculation:

$$\left[\frac{\text{Average DR Participation [kW]}}{\text{M\&V Load Reduction [kW]}} - 0.6 \right] \times \text{Approved Incentive Amount [\$]}$$

$$\text{Where average DR Participation [kW]} = \frac{\text{Total Consumption Reduction for all DR Events [net kWh]}}{\text{Total eligible DR Event hours [h]}}$$

Where approved incentive amount [\$] is the lesser of \$200 x M&V load reduction [kW] or 75% of actual and reasonable cost for installation and purchase of qualifying equipment.

Your total eligible incentive amount is based on M&V of your load reduction performed by a third-party engineer. To keep your incentives, you must remain on a Qualifying DR Program for at least 36 consecutive months.

3.15.3 Payment Option 1: Participation bonus (IP2) eligibility review

We review the customer's event performance during the first 12-months of their DR Program participation.

- We review and confirm customer's enrollment in a Qualifying DR Program
- We review DR Event dates and load reduction nominations (if applicable) to see how customers performed during events
- We forward DR participation results to program management

3.15.4 Payment Option 1: Participation bonus (IP2) verification and payment

SCE reviews a customer's DR performance and will assess eligibility for the IP2. Once IP2 is approved, processing may take six to eight weeks.

3.16 Project and customer incentive caps

Auto-DR incentives are capped at no more than \$50,000 above the reserved amount. Incentives can never be more than the total eligible cost of a project.

For customers completing a variety of project types, a single customer may not receive more than \$5,000,000 in incentives based on its individual Customer ID. However, multiple service account IDs may qualify under one Customer ID.

SCE will not pay incentives for any energy savings more than the actual annual amount of a customer's electricity usage at each SCE service account for which incentives are requested.

3.17 Participation in DR Events

Customers joining Auto-DR Programs must “actively participate”. They must enroll for 36 or 60 months (depending on payment option for customized projects) after installation and should take part in all the program’s active DR Events at least for the full first year, except in the case where a customer’s service account has received an incentive greater than or equal to \$200,000 (see section 3.18).

Customers enrolled in CBP-E need to make sure their loads are nominated monthly to participate in program events. Customers should confirm that information with their aggregators. Remember, determining the amount of IP2 for payment Option 1 (up to 40% of total eligible incentives) is based on actual DR participation over all event hours.

Those participating in CBP-E must have an OpenADR 2.0-certified client on-site. It should have the ability to receive an automated DR Event signal from our DRAS. Customers can also choose to receive a signal directly from their aggregator. In either case, the site needs to connect with locational dispatch.

If for any reason the automated load reduction signal fails to reach a customer’s client device, customers are still responsible for load reduction obligations. In the event the customer terminates their agreement with a DR Aggregator, the customer will be expected to connect to the SCE DRAS with on-site controls or their control provider cloud level with Open ADR 2.0 certification.

“**Actively Participate**” is calculated as follows:

$$\text{Average DR Participation [kW]} = \text{Total Reduction for all events [net kWh]} / \text{Total eligible event hours [h]}$$

- A. For Critical Peak Pricing (CPP): When a CPP Event is called, customers must reduce their electricity demand to match greater than 60% of their M&V load reduction when compared to their unadjusted 10-in-10 Baseline. There are 12 CPP Events per year.
- B. For Real Time Pricing (RTP): Maintaining enrollment in the program during the entirety of the performance period.
- C. For Capacity Bidding Program - Elect (CBP-E): When a DR Event is called, customers must reduce their electricity demand to match kWh greater than 60% of the M&V load reduction required for that program. Even when no events are called, customers must nominate (through their provider) at least 60% of the M&V load reduction for all operating months.

3.18 Customized Control Incentives of \$200,000 or more per project

Each service account seeking Auto-DR Customized Control Incentives that are greater than or equal to \$200,000 will be subject to additional performance requirements for the entire duration of the 36 or 60-month enrollment obligation. Customers with projects seeking incentives larger than \$200,000 are required to actively participate (as defined in section 3.17) in a Qualifying DR Program (see section 2.2 for details). That participation needs to be greater than 60% of the tested measurement and verification (M&V) level (kW) for the entire 36 or 60-month enrollment term. Customers that do not fulfill their participation obligations must pay liquidated damages, as set forth herein and in the relevant Agreement. Customers are responsible for monitoring their performance. There are two types of liquidated damages that can be assessed: performance-based liquidated damages and enrollment-based liquidated damages.

Performance-based Liquidated Damages

The performance-based liquidated damages will be assessed when a customer does not perform greater than 60% of the tested measurement and verification (M&V) level (kW) for the entire 36 or 60-month enrollment term. The liquidated damages amount equals the kW difference between the minimum kW participation and the customer's average participation during the 36 or 60-month period, multiplied by the incentive cost per M&V load reduction (kW). These liquidated damages will be assessed at the end of the 36 or 60-month period.

Performance-based Liquidated Damages = $[(0.6 \times \text{M\&V Load Reduction [kW]} - \text{Average DR Participation [kW]}) \times (\text{Approved Incentive Amount [$/ kW]})]$

Enrollment-based Liquidated Damages

The enrollment-based liquidated damages will be assessed when a customer discontinues enrollment in a qualifying DR program within the 36 or 60-month obligation period. The liquidated damages will be at a rate of \$3.00/kW for each day in which the customer is not enrolled.

Liquidated damages will not exceed the Incentive Payment amount actually paid by SCE to the customer.



4. ADDITIONAL INTEGRATED INCENTIVE OPPORTUNITIES

In addition to Auto-DR Program incentives, Energy Efficiency (EE) incentives may be available for Auto-DR projects. While it's not required, we highly recommend program participants include at least one EE measure. The total amount from all eligible incentive sources is subject to the project caps set forth above (see section 3.16).

1. Additional qualifying equipment may be eligible for incentives as part of a qualifying Auto-DR project. Apart from Auto-DR, incentives for qualifying equipment may also be available through one of our Business EE Incentive programs.
2. Before submitting the Auto-DR installation documentation, make sure EE projects are already approved for payment.
3. To be considered for Auto-DR, the program life cycle must be completed in sequential order.
4. Any EE measures will be factored in the Reservation Review and M&V Test results.

Both prescriptive (deemed) and customized incentives are available. These include hundreds of measures for lighting, HVAC, motors, and other technology. For more information on our EE rebates, visit [sce.com](https://www.sce.com).



5. CONTACTS AND PROGRAMS INFORMATION

Automated Demand Response Control Incentives:

Express: Auto-DR Express Control Incentives (sce.com)

Customized: Auto-DR with Customized Control Incentives (sce.com)

SCE Auto-DR Helpdesk: **AutoDR@sce.com** or **1-866-238-3605**

OpenADR Alliance: **openadr.org**

DRAS Self Service Module (SSM): **sce.openadr.com**

SCE Online Application and Trade Ally Community Portal: <https://sce-trade-ally-community.force.com>

Demand Response Programs: **sce.com/drp**

Demand Response Events: **sce.com/drp/events**

Southern California Edison: **sce.com**

SCE Demand Response Alerts (smartphones) APP: **on.sce.com/scedralerts**

Trade Professionals Information Center: **sce.com/partners/contractors**

24 Hour Emergency Services: Power Outages, Lines Down, etc. (CA. ONLY): **1-800-611-1911**

General Customer Service (U.S. and Canada): **1-800-655-4555**

Hearing and Speech Impaired (TDD) (CA. ONLY): **1-800-352-8580**