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# W O R K P A P E R   S U B M I S S I O N

## C O V E R   S H E E T

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**PURPOSE:** The information in this coversheet will be used by the Deemed Review Team to identify incoming workpapers using consistent information applicable to track key information needed for the workpaper review.

**INSTRUCTION:** This cover sheet should be completed by Program Administrators upon submitting a workpaper. Additional instructions are provided below.

### Program Administrator (PA) Information

Parameter	Description	PA Entry
<b>PA</b>	Please check one.	<input type="checkbox"/> SCE <input type="checkbox"/> SCG <input checked="" type="checkbox"/> PG&E <input type="checkbox"/> SDG&E
<b>PA Lead based on Use Category</b>	Please check one.	<input type="checkbox"/> SCE <input type="checkbox"/> SCG <input checked="" type="checkbox"/> PG&E <input type="checkbox"/> SDG&E
<b>Contact info</b>	Please provide the name and email address of submitter.	Adan Rosillo Adan.Rosillo@pge.com

### Workpaper Information

Parameter	Description	PA Entry
<b>Date of Workpaper Submission</b>	This entry should be date of upload to WPA (MM/DD/YYYY). Actual submission date will be noted as the subsequent first or third Monday of the month.	12/21/2020
<b>Workpaper Title</b>	This entry should match the title on the workpaper.	Home Energy Reports
<b>Source Description</b>	This entry should match the source description for the workpaper. (e.g., SWHC099-01)	SWWB004-02

Parameter	Description	PA Entry
<b>Workpaper Phase</b>	Please provide the phase and year for the workpaper. (e.g., 2020 P2 Workpaper Revision)	<p>Effective Year:</p> <p><input checked="" type="checkbox"/> Phase 1    <input type="checkbox"/> Phase 2</p> <p><input type="checkbox"/> New workpaper (new product or technology, new delivery type)</p> <p><input checked="" type="checkbox"/> Workpaper revision (new tiers, new costs, change in measure parameters such as EUL or NTG, measures added to workpaper)</p> <p><input type="checkbox"/> Workpaper adoption (IOU adoption with new Implementations, no change to Measures, Cost and EE Impacts)</p> <p>Notes: Changes effective for 2021</p>

Parameter	Description	PA Entry
<b>Rationale for Workpaper Revision</b>	Please check all boxes that apply and include a brief description explaining why the workpaper is being revised.	<input type="checkbox"/> Not a revision but a new WP <input type="checkbox"/> Code <input type="checkbox"/> DEER <input type="checkbox"/> Disposition <input type="checkbox"/> CPUC Resolution <input type="checkbox"/> Baseline Update <input type="checkbox"/> Cost Update <input type="checkbox"/> Industry Standard Practice Study <input type="checkbox"/> Other: _____ <input checked="" type="checkbox"/> WP Resubmission of Existing Revision (minor edits/corrections/new implementations) Notes: Updated workpaper to clarify savings reporting process and address holdback language within Savings Reporting section; modified peak period hours within Peak Electric Demand Reduction section to align with Resolution E-4952
<b>Measure Impact Type (DEER / CEDARS)</b>	Please check boxes that apply and include a brief description explaining measures types if using Custom.	<input type="checkbox"/> Cust-FuelSub <input type="checkbox"/> Cust-Gen <input type="checkbox"/> Cust-NMEC <input checked="" type="checkbox"/> Cust-RCT <input type="checkbox"/> Cust-SEM <input type="checkbox"/> Deemed-DEER <input type="checkbox"/> Deemed-WP <input type="checkbox"/> Deemed-DEER-FuelSub <input type="checkbox"/> Deemed-WP-FuelSub Notes: Measure is a residential behavioral program that utilizes Randomized Control Trial (RCT) methodology

Parameter	Description	PA Entry
<b>Effective Date</b>	Please provide the <u>proposed</u> earliest date of any claims to be made against this workpaper if it is approved. If this is a Phase 2 workpaper, please account for the submittal date as the first or third Monday of the month. Please add 90 days, where applicable. <sup>1</sup>	Start Date: 01/01/2021 Notes:
<b>Total expected <u>statewide net</u> lifetime savings from workpaper measures in the year indicated.</b>	This value is expressed in kWh and therms for electric and gas, respectively.	Year: 2021 Electric: 216,253,454 (kWh) Gas: 2,437,402 (therms) Check which PAs are included in this estimate of savings: <input checked="" type="checkbox"/> SCE <input checked="" type="checkbox"/> PG&E <input checked="" type="checkbox"/> SCG <input checked="" type="checkbox"/> SDG&E Notes: Values as reported in CEDARS for 2021. FYI: Workpaper revision did not include changes that would impact a change in statewide net lifetime savings

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<sup>1</sup> 90-day does not apply to new workpapers or new measures added to workpapers.

Parameter	Description	PA Entry
<p><b>Change in net lifetime portfolio savings due to workpaper revision in the year indicated.</b></p>	<p>This value is expressed in kWh or therms for electric and gas, respectively. Note a + indicates portfolio savings are expected to increase and a – indicates portfolio savings are expected to decrease.</p>	<p>Year: 2021</p> <p>Gas: 0 therms</p> <p>Electric: 0 kWh</p> <p>Describe the sources of the change:</p> <p>There is no expected change in net lifetime portfolio savings due to the workpaper revision. The RCT methodology for HER remains the same. How HER accounts for changes in net portfolio savings mainly depends on the number of customers in treatment (which is under IOU control) and weather (which is not under IOU control). Per the IOUs, there are no appreciable changes in HER for 2021. Any changes to savings will occur naturally through the course of running the program.</p>
<p><b>Stakeholder Communications</b></p>	<p>Describe which stakeholders were notified and what was the outcome of the correspondence. For some workpapers this may not be applicable. Please include additional sheets if necessary.</p> <p>(E.g., Manufacturer for SCT submitted comments on workpaper, see attached)</p>	<p><input type="checkbox"/> 3P Implementer</p> <p><input type="checkbox"/> Distributor(s)</p> <p><input type="checkbox"/> Manufacture(s)</p> <p><input checked="" type="checkbox"/> IOU Internal Stakeholders (Policy/Program Operations/Senior Leadership/Business Operation)</p> <p><input checked="" type="checkbox"/> External Stakeholders (consultants, engineering SME, etc.)</p> <p>Notes:</p>

Parameter	Description	PA Entry
<p><b>CalTF Development</b></p>	<p>During development of this workpaper were there any specific flagged issues from CalTF pertaining to technical methodology or approach?</p>	<p><input type="checkbox"/> Yes    <input checked="" type="checkbox"/> No</p> <p>If Yes, then select issues types:</p> <p><input type="checkbox"/> Savings model approach and or assumptions require updating (baseline, ISP, non-DEER building prototypes, data files, extrapolation, weather data, etc.)</p> <p><input type="checkbox"/> Measured savings calculations approach and or assumptions require updating (M&amp;V plan, NMEC, Non-Routine Events (NRE), independent 3P validation)</p> <p><input type="checkbox"/> Sample size may not representative of all climate zones, building types, HVAC, etc.</p> <p><input type="checkbox"/> Issue with Savings Calculations (Interactive Effects, HOU, Code, Baseline, ISP, proprietary NDA, etc.)</p> <p>Notes:</p>

Parameter	Description	PA Entry
<b>Potential Market Impacts or Controversies</b>	Describe any responses to the stakeholder communications and any other sources of stakeholder or PA implementation concern with this workpaper revision regarding negative market impacts or controversies.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If Yes, then please check appropriate boxes: <input type="checkbox"/> 3 Party Direct Install (DI) inventory <input type="checkbox"/> Existing contractual commitments <input type="checkbox"/> Lead time procurement issues <input type="checkbox"/> Market Disruption (ramp down/re-start) <input type="checkbox"/> Delivery channel changes (UpDeemed/DnDeemed/DnDeemDI) <input type="checkbox"/> PA Program ramp down (no longer cost effective) <input type="checkbox"/> Other (please detail) Notes:
<b>Associated Dispositions</b>	Is there a disposition associated with this workpaper?  If yes, please include the file name. (e.g., SWFS007-02_HotHoldCab_02_19_2020.pdf)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Notes:
<b>Additional Notes</b>		

### Cover Sheet Revision History

Revision Number	Revision Date	Implementation Start Date	Author	Summary of Changes
0	3/15/2019	3/18/2019	Kerri-Ann Richard, Deemed Review Team	Original Cover Sheet
1	4/17/2019	4/22/2019	Kerri-Ann Richard, Deemed Review Team	Addition of Consult with Stakeholders entry
2	05/18/2020	05/18/2020	Kerri-Ann Richard, Deemed Review Team	Updated All Entries