# EARLY OPINION REQUEST INFORMATION

The information provided in this request form will be used to request an Early Opinion (EO) from CPUC staff.

Program Administrator (PA) may request an EO review on projects in the development stage that are not ready for full project review. EO requests may include any aspect of project development, such as policy questions, appropriate baseline, calculation techniques, preponderance of evidence documentation, program influence, and so on. EO requests may reference a specific project or cover issues relevant to multiple projects.

EO requests must first clearly state the issue(s) or the policy ‘gray area’, followed by a set of specific clarifying questions. The PA is also expected to provide opinions/thoughts on the ‘gray-area’ issue(s) for the CPUC Staff to consider.

# INSTRUCTIONS

All fields with an asterisk (\*) are mandatory to submit the form.

Any tables containing Personally Identifiable Information (PII) should be flagged by checking the box at the top of each section of the form. Any fields containing PII will be flagged for confidentiality.

To add rows, click the  that appears after clicking in the cell with the light blue shading).



EARLY OPINION INFORMATION

|  |  |
| --- | --- |
| **EO Title\*** |  |
| **EO Tracking Number\*** |  |
| **CPUC EO Reviewers** |  |

EO REQUESTOR

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| ***Add more rows as needed by clicking the  that appears after clicking in the cell with the light blue shading*** |
| **PA / Third Party Implementer\*** |  |
| **Joint PA EO\*** | Choose an item. |
|  | **Name, Title** | **Telephone #** | **Email** |
| 1. **Primary PA Contact\***
 |  |  |  |
| 1. **Additional PA Contact**
 |  |  |  |
| 1. **Additional PA Contact**
 |  |  |  |
| 1. **Additional PA Contact**
 |  |  |  |
| **Program Name(s)** |  |

EO SCOPE

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| Please do not include any PII in this section |
| **Describe the types of business(es) impacted.\***Is the proposed set of measures applicable to any of the following business types? |
| [ ]  Small-and Medium-Sized Businesses (SMBs) [ ]  Hard-to-Reach (HTR) [ ]  Disadvantaged Communities (DACs) |
| **Estimate the size of the incentive per project associated with a project subject to the EO review:\***Choose an item. |
| **EO Category(s)\*** | [ ]  Policy[ ]  Baseline[ ]  EUL/RUL [ ]  Incentive [ ]  Equity | [ ]  Measure Performance [ ]  Measure Application Type[ ]  Measure Cost[ ]  Documentation Requirements [ ]  Calculation Technique | [ ]  Program Influence [ ]  Savings Reporting [ ]  M&V Boundaries [ ]  Fuel Substitution |
| [ ]  Other, please specify: | Click or tap here to enter text. |
| **Savings category** | Choose an item. |
| **Project Type** | Choose an item. |
| **Measure Description** | Click or tap here to enter text. |
| **Industry/Market Sector\*** | [ ]  Residential [ ]  Agricultural | [ ]  Commercial[ ]  Cross cutting | [ ]  Industrial |
| [ ]  Other (describe) | Click or tap here to enter text. |

DATE TRACKING

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| ***Add more rows as needed by clicking the  that appears after clicking in the cell with the light blue shading*** |
| **PA Submission Date\*** | Click or tap to enter a date. |
| **Is this an urgent request?\*** | Choose an item. *If Yes, please provide an explanation (e.g., summer reliability, seasonal production, etc.):*Click or tap here to enter text. |
| **Update number** | **Summary and Location of Updates** | **CPUC or PA?** | **Date** |
|  |  | Choose an item. | Click or tap to enter a date. |
|  |  | Choose an item. | Click or tap to enter a date. |
| **Completion Date** | Click or tap to enter a date. |
| **Posting Date** | Click or tap to enter a date. |

EO QUESTIONS

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| 1. **EO QUESTION**
 |
| ***To add another response row, click the  that appears after clicking in the cell with the light blue shading. To add another EO question table, click the  that appears at the bottom of this table.*** |
| **Does this table contain PII?\*** [ ]  Yes [ ]  No  *If yes, please identify all PII in the form below* |
| **Problem Statement\*** *Please summarize the issue(s) and/or state the question(s)* |
| Click or tap to enter a date. |
|  |
| **Background\*** *Provide context for the problem or situation* |
|  |
| **Proposed Solution\*** *Describe possible resolution* |
|  |
| **Supporting Information / References\*** *Please cite relevant rule(s)/policy(s)/Decision(s)* |
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| **CPUC Staff Clarifying Question(s) to PA (if needed)** |
| Click or tap to enter a date. |
|  |
| 1. **PA Response**
 |
| Click or tap to enter a date. |
|  |
| 1. **CPUC Response (if needed)**
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| Click or tap to enter a date. |
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| **CPUC Conclusion** |
| Click or tap to enter a date. |
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CPUC EO SUMMARY

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| **Is this EO statewide applicable?** Choose an item. |
| **EO Title** |  |
| **EO Tracking Number** |  |
| **Summary of EO Issue(s)/Question(s)** |
|  |
| **Summary of EO Conclusions, Recommendations, and Guidance**  |
|  |