Transmission Project Review Process

Workshop for the Stakeholders and Utilities

Energy Division, FERC Cost Recovery Section

August 17, 2023

California Public Utilities Commission

Meeting Agenda

I. Energy Division FERC Cost Recovery Team
II. Purpose and Background of the Transmission Project Review Process
III. TPR Process Overview and Description
IV. TPR Process Project Spreadsheet
V. Accessing Utility Data
VI. TPR Process Schedule
VII. Additional Q&A
VIII. Next Steps and Close

FERC Cost Recovery Staff

- Simon Hurd – Program and Project Supervisor
- Joshua Kim – Senior Utilities Engineer
- Wenli Wei – Senior Analyst (SDG&E)
- Phil Voris – Senior Analyst (PG&E)
- Lou Torres – Senior Analyst (SCE)
- Yasemin Akay – Analyst (PG&E)

Purpose of Transmission Project Review Process

- Uniform process to review IOUs' capital transmission projects to:
  - make progress towards the state's clean energy goals;
  - contribute more robust information for CPUC permitting processes;
  - inform the Integrated Resource Planning program;
  - provide useful data to help develop grid resiliency and microgrid facilities;
  - monitor project costs and progress; and
  - facilitate the CPUC's safety and siting authority through enhanced oversight of the changing electric grid.

- Allows the CPUC and all Stakeholders to receive robust data from Transmission Owners and inquire about, and provide feedback on, the IOUs' historical, current, and forecast transmission projects.

Transmission Project Review Process

Final Resolution E-5252, April 27, 2023

Resolution, including Atch A (Description) and Atch C (Schedule)

- 507896441.PDF (ca.gov)

Published Project Spreadsheet Template (Atch B)

- 507896821.xlsx (live.com)

Background of the TPR Process

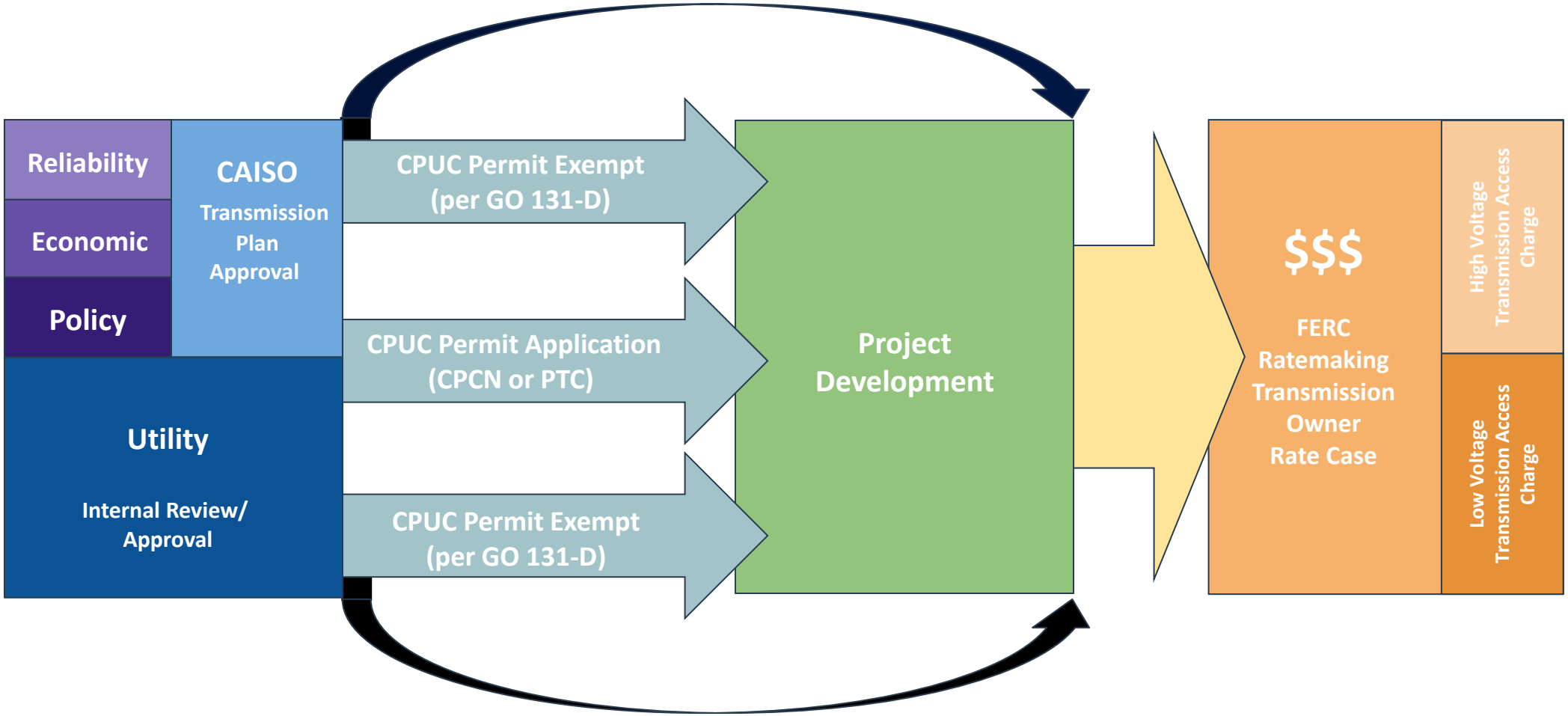
- California Agencies' Advocacy at FERC
- FERC Settlements
  - PG&E's Stakeholder Transmission Asset Review (STAR) Process
  - SCE's Stakeholder Review Process (SRP)
  - SDG&E's Evaluation of Forecast Period Capital Additions
- Effectiveness of Temporary FERC-Derived Processes
- Breadth of Benefits
- TPR Process

The TPR Process

A. Overview and Main Components
B. TPR Process Description
C. TPR Process Project Spreadsheet
D. TPR Process Schedule

Overview: Main Components of the TPR Process

Transmission Project Review Process



The Transmission Project Review (TPR) Process occurs after the transmission planning process has been completed.

California Public Utilities Commission

Key Components of the TPR Process

- Transmission Owners (TOs) provide detailed semi-annual project data, including Project Spreadsheet, Authorization Documents, and Procedures on all projects over $1 million that had, or will have, any capital expenditures in the previous five years, the current year, or four future years.

- Stakeholders can issue timely questions and comments on projects and procedures to which the TOs provide written responses.

- TOs are required to hold semi-annual Stakeholder meetings informed by agenda items provided timely by Stakeholders.

Projects in the TPR Process

- Utility self-approved projects are the impetus for TPR Process (a.k.a. asset management, repair and replacement, or Non-CAISO Projects).

- Also included in the TPR Process:
  - Projects approved in CAISO's Transmission Planning Process (TPP),
  - Network upgrades related to CAISO's Generator Interconnection and Deliverability Allocation Procedures (GIDAP).

- Alternatives to utility self-approved projects may be discussed, but likely not a great use of anyone's time to go into alternatives to already planned and approved TPP projects.

TPR Process and Expediting Projects

- The TPR is a means by which stakeholders can review and discuss project planning, prioritization, and implementation with the IOUs well before projects are included in rate cases at FERC.
- Contrary to concerns that the TPR Process could exacerbate project delays, increased and ongoing transparency of these projects will likely result in more discussion and expeditious, efficient, and cost-effective implementation.
- Formal challenges to projects and/or costs occur at FERC.
- TOs typically include projects in their rate cases to begin cost recovery when projects are, or soon will be, used and useful.
- Therefore, if increased transparency from the TPR Process does result in the challenge of a project or its costs, that happens at FERC when the project is going into operation.

Other Sources of Information

- TPR Process was not passed with any pre-conceived notions related to information sharing in other venues.
  - Reasonable expectation that the TPR Process will replace FERC-Derived processes.
  - CAISO's Transmission Development Forum (TDF) provides limited quarterly data and discussion on generator interconnection-related TPP Projects and network upgrades. If any changes are to occur to the TDF, those are to be determined by the CAISO, participating stakeholders, and the relevant PTOs.

- TPR Process does not overturn any decisions at the CPUC.

TPR Process Description (Atch A)

- Walk through specific sections
  - Definitions
  - Information
  - Inquiry and Comments
  - Stakeholder Meetings
  - Use of Data
  - Dispute Resolution
- Discussion and clarification

Definitions

- 1.12 Stakeholder: A CAISO Market Participant; an electric utility regulatory agency other than the CPUC within California; an Interconnection Customer that has submitted an Interconnection Request to the ISO under the ISO's Large Generator Interconnection Procedures or Small Generator Interconnection Procedures (LGIP or SGIP); a developer having a pending or potential proposal for development of a Generating Facility or transmission addition, upgrade or facility and who is performing studies in contemplation of filing an Interconnection Request or submitting an infrastructure project through the ISO's Transmission Planning Process; a not-for-profit organization representing consumer regulatory or environmental interests before Local Regulatory Authorities or federal regulatory agencies; or an entity providing consulting services or support to a party eligible to receive Confidential Information according to the criteria described above.

Definitions

- 1.10 Project: Any FERC-jurisdictional electric transmission project with actual or forecasted costs of one million dollars or more, which a Utility has included or intends to include in its FERC-jurisdictional electric transmission rate base, including **both CAISO Projects and Non-CAISO Projects**. These costs include those for materials, labor, overhead, and allowance for funds used during construction. A Project would include all of the components of a specifically identified Project, as well as programmatic or "blanket" work categories.

- 1.8 Non-CAISO Project: An electric transmission Project that is not reviewed and approved in the CAISO Transmission Planning Process.

Definitions

- 1.3 CAISO Project or CAISO-approved Project: An electric transmission Project that is reviewed and approved in the CAISO Transmission Planning Process.
- 1.6 Generator Interconnection and Deliverability Allocation Procedures or GIDAP or Generator Interconnection Process: The CAISO's GIDAP implements the requirements for both small and large generating facility interconnections to the CAISO-controlled transmission grid and provides a process for allocating transmission plan deliverability for interconnection requests.

Information

- Project Data
  - 2.1. "… [A] Utility must furnish a sortable Project Spreadsheet containing the Project-specific data identified in Attachment B to Resolution E-5252 for all electric transmission Projects as defined in Section 1.10 above … [T]he Project Spreadsheet must be fully populated for each Project with data extracted from the Utility's database no more than 60 days prior to the data being provided. If the Utility is providing data that is less than complete, written notification, an explanation of the deficiencies, and when the deficiencies will be remedied shall be provided to the CPUC and Stakeholders no fewer than five business days prior to date the Project Spreadsheet is to be issued.

Information

- Project Data
  - 2.1.1. The Project Spreadsheet shall include all Projects, including those that have been, or will be, included in the CAISO Transmission Planning Process, FERC jurisdictional transmission network upgrades required for generator interconnection, as well as Utility Self-Approved Projects.
  - 2.1.2. The Project Spreadsheet shall contain current Project-specific actual and forecast data for all electric transmission Projects that had any capital expenditures in the prior five calendar years.
  - 2.1.3. The Project Spreadsheet shall contain current Project-specific actual and forecast data for all projects with any capital expenditures in the current year or the next four years.

Information

- Public and Confidential Data
  - 2.1.7. There shall be a public version and, as applicable, a confidential version of each semi-annual Project Spreadsheet. The public version shall be distributed to a maintained distribution list and made available on each Utility's website with any confidential data and Critical Energy Infrastructure Information ("CEII") redacted.

  - 2.1.8. Information that is confidential or designated as CEII and included in the Project Spreadsheet shall be provided to certain Stakeholders pursuant to CPUC and FERC limitations. Access to the confidential and/or CEII information will require a signed non-disclosure agreement. Depending on the nature of the CEII information, disclosure may be limited to the CPUC.

Inquiry and Comments

- 3.1. Information Requests and Comments: Stakeholders may submit information requests and comments to the Utility within a 45-calendar day period that begins on the day following the production of semi-annual information identified in Section 2.1. Stakeholders may also submit information requests and/or comments within a 15-calendar day period that begins on the day following a Stakeholder meeting. The Utility will exercise best efforts to respond to the information requests and comments within 15 business days after a Stakeholder's submittal. Should the Utility not be able to respond within 15 business days, the Utility shall notify the CPUC and all Stakeholders in writing of the delay within ten business days of receiving the information request with an explanation of why the 15-business day expectation cannot be met.

Inquiry and Comments

- 3.2. If a Stakeholder requests additional Project-specific information from the utility outside the time frames outlined in Section 3.1, the Utility will exercise best efforts to provide responsive information within ten business days of a Stakeholder's request … These project-specific information requests shall relate to previous information requests and/or Utility responses but do not need to be about the same projects previously inquired about. Should the Utility not be able to respond within ten business days, the Utility shall notify in writing the CPUC and all Stakeholders of the delay within five business days after receiving the information request with an explanation of why the ten-business day expectation cannot be met.

A Few Details About Project-Specific Data Requests

- Information requests under section 3.2:
  - Must be project-specific;
  - Shall relate to previous information requests and/or Utility responses but do not need to be about the same projects previously inquired about;
  - Should refer to the prior information request or response to demonstrate it is a follow-up information request;
  - Should be submitted to the TO no later than one-week after the Stakeholder meeting data responses are received; and
  - Should be responded to by the TO within 10 business days.

Stakeholder Meetings

- 4.1. Minimum of two Stakeholder meetings annually
  - First Stakeholder meeting in a calendar year:
    - Review of the Utility's Project Spreadsheet, objectives, assumptions, and deliverables for the current year and the opportunity for Stakeholders to suggest new projects or project alternatives;
    - Report on the prior year's Project implementation and identify and explain modifications to key factors/assumptions relied upon in the prior year; and
    - Opportunity for Stakeholders to raise and discuss any proposed adjustments to the data being provided.
- 4.2. Both Stakeholder meetings will include responding to comments and questions related to Projects in the Spreadsheet, Procedures, Authorization Documents, and other related issues identified in advance of the Stakeholder meetings.
- 4.3. Opportunity to provide agenda items no fewer than 15 calendar days before Stakeholder meeting. Utility will incorporate these agenda items into the Stakeholder meeting and shall have relevant subject matter experts present at the Stakeholder meeting to address these topics.

Use of Data

- 5.1. Stakeholders may use the data or other information provided in the TPR Process in multiple fora, including, without limitation, in CPUC, CAISO, FERC, or U.S. Department of Energy proceedings, subject to compliance with confidentiality and/or CEII restrictions.

- 5.2. Nothing herein precludes a Stakeholder from challenging the designation of a document as confidential or CEII, either before FERC, the CPUC, or a court of competent jurisdiction.

Dispute Resolution

- 6.1. A Stakeholder may bring a dispute under this section for any matter, substantive or procedural, pertaining to the implementation of the TPR Process.
- 6.2. A dispute will be initiated when a disputing party sends notice to the Utility, with a copy provided to that Utility's TPR Process distribution list, that it is contesting a determination made by the Utility.
- 6.3. Within 30 calendar days of receipt of a notice of dispute, disputing parties and the Utility will meet and attempt to resolve the dispute. If the disputing parties are unable to resolve the dispute, within 10 calendar days of reaching an impasse, a disputing party may file a "Notice of Dispute" with the CPUC's Executive Director. The Executive Director or designee will review the disputed issue and make a determination resolving the dispute within 30 calendar days of receiving the Notice of Dispute. The determination of the Executive Director or designee shall be served on the filer and Stakeholders. The Executive Director's or designee's determination shall be final.

10-Minute Break

TPR Project Spreadsheet (Atch B)

- Data Categories and Data Fields
- Data and Format Expectations
- Discussion and Clarifications

Data Overview
Guiding Principles

- Overarching goals:
  - Broad accessibility
    - Excel (no passwords)
  - Suitability to automatic rendering / reading / database processing
- Guiding principles:
  - Not a sparse dataset (All cells filled; NA's or 0's for 'no value')
  - Internal consistency to prevent unwanted variation
  - Err on the side of precision

Data Overview
Data Types

- **Numbers** use Excel Number types, being mindful of precision level.
  - e.g., 21. Transmission Project Size (length in miles)
- **Dollars** use Excel Currency or Number types. If combined with other data, treat as a text string.
  - e.g., 54,000,000. Original Projected Cost or Cost Range
- **Dates** use Excel Date type. If combined with other data, treat as a text string and format YYYY-MM-DD.
  - e.g., 12. Last Inspection
- **Narrative text or names** use Excel General type.
  - e.g., 2. Project Name
- **Discrete options** use Excel General type, with options derived from a list.*
- **Booleans** use the Boolean type: TRUE or FALSE.
  - e.g., 17. Wildfire Related

Walkthrough: Data Fields
Lists

- Many fields require more than one input. In those cases, the pipe delimiter (" | ") will be used because it is unlikely to conflict with narrative text and is a common practice.
  - See 2. Project Name, or 62. FERC Year(s)
- In cases where two inputs are repeated multiple times in a single cell, the pipe is a primary delimiter. Secondary delimiters vary.
  - See 4. Location

Data Overview
Categories

- The final project spreadsheet will contain a "Data Field Descriptions" tab that functions as a codebook. It contains the field names, format, examples, and descriptions of each field.

Line	*Transmission Project Data Field*	*Format*	*Example*	*Input Terms and Descriptions*
1	Row/Line No.	Number (whole number)	4	Row/line number in spreadsheet. #1 of all FERC-jurisdictional elec cost of which At Unique ID #2 w million-dollar threshold applies t

- This tab is divided into sections, to be described next
  - Project Description
  - Utility/CAISO Approval and FERC Rate Cases
  - CPUC Permit Status
  - Project Status
  - Costs
  - Notes

Walkthrough: Data Fields *Project Description (29)*

1. Row / Line No.
2. Project Name
3. Location 1
   Latitude / Longitude
4. Location 2
   Cities / Counties
5. Project Description
6. Project Description - What
7. Project Description – Action Taken
8. Project Dependencies
9. Primary Purpose
10. Secondary Purpose
11. NERC/WECC/CAISO Standard/Requirement/Contingency
12. Last Inspection
13. Age of Asset
14. Types of Analyses
15. Alternative Solutions and Costs
16. CPUC Fire Threat Zone / Rating
17. Wildfire Related
18. RAMP
19. Other Environmental Factors
20. Project Manager
21. Transmission Project Size
22. Substation Project Footprint
23. Transmission Voltage Level
24. Utility Prioritization Ranking
25. Substation or Transformer Capacity
26. Utility Unique ID #1
27. Utility Unique ID #2
28. Utility Unique ID #3
29. Changes in Unique IDs

Walkthrough: Data Fields
Locations

3. Location 1 (Latitude / Longitude)

- For assets that span a distance, include coordinates for the endpoints, separated by a " | ".
- For other assets, a single central coordinate is appropriate.
- For non-locational assets (e.g., software), NA is appropriate.

4. Location 2 (Cities / Counties)

- Where a project exists across multiple cities or counties, all locations are required, separated by pipes.

Walkthrough: Data Fields
Options Lists

- Several fields accept a limited set of TO-agreed-upon options:
    6. Project Description - What
    7. Project Description – Action Taken
    11. NERC/WECC/CAISO Standard/Requirement/Contingency
    14. Types of Analyses
    15. Alternative Solutions and Costs
    52. Reason for Change in In-Service Date
- The Project Spreadsheet provides examples. Over the next couple of months, TOs will be coordinating to finalize a discrete list of options for each field. Final draft lists are to be submitted to the CPUC by Friday, September 18.
- Case and spacing should be maintained consistently.

Walkthrough: Data Fields
Project Dependencies

8. Project Dependencies

- This field identifies other projects upon which the current project is dependent.
- Example: if a transmission line cannot be completed until a substation is upgraded, the transmission line would reference the substation upgrade – and potentially other projects – by UID #1, in this field.

Walkthrough: Data Fields
Age of Asset

13. Age of Asset

- Refers to the existing major asset(s) being replaced, upgraded, or repaired.
- Reflects the age in-service to date or the age of the asset at the time it was replaced.
- Where multiple assets are involved or clarification is otherwise appropriate, use the Notes field (70) to provide details.
- If there is no preexisting major asset, the age is zero (0).
- If the asset has previously been *significantly* upgraded, the date of the upgrade may be used, with explanation in Notes.

Walkthrough: Data Fields
Wildfire Related

17. Wildfire Related

- This field accepts three Booleans (True/False), separated by " | ". The three questions answered in this field are:
  1. Is the project related to repairing wildfire damage?
  2. Is the project a measure identified in the Wildfire mitigation Plan?
  3. Is the project related to wildfire in some other way? If #3, please explain in the "Notes" data field.
- In practice, an answer could read:
  - FALSE | FALSE| TRUE
- In such a case, a narrative explanation would be added to field 70 (Notes), preceded by an identifier, "[Wildfire Related]". e.g.,
  - [Wildfire Related] This project serves to deliver power to the fire monitoring facility at North Table Mountain.
- Formatting of the Notes field will be discussed later in the presentation.

Walkthrough: Data Fields
Units of Measure

23. Transmission Voltage Level (kV)
24. Substation or Transformer Capacity (MVA and/or kV)

- For fields where different units may be applied (MVA, kV), Excel General strings should be used, and units included.

Walkthrough: Data Fields
Utility Unique ID fields

26. Utility Unique ID #1
27. Utility Unique ID #2
28. Utility Unique ID #3

- Include separate project lines, as described and required in data fields 26-28, for all subparts, i.e., ID #1 of all FERC-jurisdictional electric transmission projects, including generator interconnection-related network upgrades:
  1. the total cost of which At Unique ID #2 will at any point equal or exceed $1 million. If there is no ID #2 to provide, the million-dollar threshold applies to ID #1. and
  2. for which there were capital expenditures in the last five years OR for which any capital expenditures are anticipated in the current or next four years, regardless of the actual or anticipated operative date.
- Each project should have at least one Row/Line No. in this spreadsheet, as subparts of projects will require additional project lines.

Walkthrough: Data Fields
Utility/CAISO Approval and FERC Rate Cases (10)

30. Utility Approval
31. Year of Internal Utility Approval
32. Process(es) for Utility Approval
33. Long term Transmission Investment Plan Inclusion
34. CAISO Year
35. Transmission Planning Process ("TPP") Phase 3
36. Year(s) when considered in CAISO TPP
37. Year when expected to be considered in CAISO TPP
38. Link to TPP where project has been considered, approved, and/or expected to be considered
39. Generator Interconnection and Deliverability Allocation Procedures (GIDAP) Related

Walkthrough: Data Fields
Utility/CAISO Approval and FERC Rate Cases (10)

30. Utility Approval

- This field identifies if a project is a Non-CAISO Project ("TRUE") or not ("FALSE")
- See *Definition* slides for further detail.

31. Year of Internal Utility Approval

- Utilities to work with CPUC on this item.

Walkthrough: Data Fields
CPUC Permit Status (7)

40. CEQA Status
41. CEQA/NEPA Document Type
42. CEQA/NEPA Lead Agency
43. CPUC Filing Type
44. CPUC Date Filed
45. CPUC Status
46. CPUC Status: Year

Walkthrough: Data Fields
Project Status (7)

47. Project Status
48. AACE Class
49. Construction Start Date
50. Original Planned In-Service Date
51. Current Projected or Actual In-Service Date
52. Reason for Change in In-Service Date
53. In-Flight Status

Walkthrough: Data Fields
Project Status and *Construction Start Date*

47. Project Status

- This is a discrete options list field.
- CPUC will reach out with an options list for this field.
- Where "percentage of construction complete" options are concerned, the percentage is defined as the percent of total estimated construction funds (i.e., percentage of construction share of the EAC) spent from inception to date.

Walkthrough: Data Fields *Costs (16)*

- 54. Original Projected Cost or Cost Range
- 55. Cost Cap
- 56. Current Projected Total or Actual Final Cost
- 57. Actual Capital Expenditures
- 58. Projected Capital Expenditures
- 59. Construction Work in Progress Expenditures
- 60. Accrued Overhead
- 61. Accrued AFUDC
- 62. FERC: Year(s)
- 63. Dollars Put into FERC Rate Base
- 64. Percentage of Bid
- 65. Percentage of Work Requested by Others Passed onto Ratepayers
- 66. Cost-Benefit Analysis
- 67. FERC Incentives
- 68. Percentage of Cost in High Voltage TAC
- 69. Percentage of Cost in Low Voltage TAC

Walkthrough: Data Fields
Expenditures, Capitalization, and Rate Base

- Several fields include nominal years in the field name, based on a standard format:
  - 57. Annual Capital Expenditures ($000)
  - 58. Projected Capital Expenditures ($000)
  - 63. Dollars Put into FERC Rate Base ($000)

- Each year, fields will rotate in and out of the spreadsheet, ensuring 5 years of historical data, 4 years of future data, and the current year.

- See following slide for example fields for SDG&E's first submission.

Walkthrough: Data Fields
Expenditures, Capitalization, and Rate Base

57. Actual (and Forecast) Capital Expenditures includes five historical and one current year
58. Projected Capital Expenditures spans the next four years

57	57	57	57	57	58	58	58	58	58
Actual Capital Expenditures 2019 ($000)	Actual Capital Expenditures 2020 ($000)	Actual Capital Expenditures 2021 ($000)	Actual Capital Expenditures 2022 ($000)	Actual and Forecast Capital Expenditures 2023 ($000)	(Current Year) Actual and Forecast Capital Expenditures 2024 ($000)	Projected Capital Expenditures 2025 ($000)	Projected Capital Expenditures 2026 ($000)	Projected Capital Expenditures 2027 ($000)	Projected Capital Expenditures 2028 ($000)

63. Dollars Put into FERC Rate Base spans four historical and one current year

63	63	63	63	63
Dollars Put into FERC Rate Base 2020 ($000)	Dollars Put into FERC Rate Base 2021 ($000)	Dollars Put into FERC Rate Base 2022 ($000)	Dollars Put into FERC Rate Base 2023 ($000)	Dollars Put into FERC Rate Base 2024 ($000)

Walkthrough: Data Fields
Notes (1)

- 70. Notes

This field may contain details related to the following fields:

9. Primary Purpose
17. Wildfire Related
35. Transmission Planning Process ("TPP") Phase 3
41. CEQA/NEPA Document Type
42. CEQA/NEA Lead Agency
45. CPUC Status
47. Project Status

Additions to the Notes field are preceded by the referenced field in brackets and followed by 3 newlines between entries. e.g.,

[Wildfire Related] Wildfire connection narrative information here...

[Project Status] Status description here...

Discussion and Clarification (Q&A)

When in doubt, refer to the Format description in the spreadsheet or contact CPUC staff at TPRProcess@cpuc.ca.gov.

Accessing Utility Data

- SDG&E
- PG&E
- SCE

SDG&E Project Data Access

- Non-confidential Project List will be made available on company website.
  - FERC Tariffs | San Diego Gas & Electric (sdge.com)

- Confidential Project List will be made available via an external SharePoint site for interested Parties that have signed the NDA (AL 4251-E).

- All Approval Documentation and Procedures for projects in the Project List will be made available upon request.

*SDG&E's data availability methods are subject to change.

Accessing PG&E's TPR Process Data Spreadsheets and Associated Materials

PG&E will make its Public Documents (e.g., spreadsheets, business cases, authorization documents, etc.) for the TPR Process available electronically on PG&E's website. To access the files, stakeholders should follow the following instructions:

1. Search for Public Case Documents: https://pgera.azurewebsites.net/Regulation/search
2. Select "Transmission Project Review Process []" from the Case dropdown menu
3. Select "PGE" from the Party dropdown menu
4. Input the date range you are searching documents for. E.g., "06/01/23" to "08/17/23"
5. Click Search

For Confidential Documents and/or unredacted versions of documents for the TPR process, stakeholders will need to execute a nondisclosure agreement (NDA) with PG&E in advance of documents being transmitted. Stakeholders can reach out to TPRProcess@pge.com for a copy of the NDA.

PG&E will provide a separate e-mail to stakeholders that signed an NDA to receive the Confidential Documents for the TPR Process. The e-mail will include a link to PG&E's Enterprise Secure File Transfer (ESFT) portal, where the documents will be available for download.

If you have any immediate questions, please send an e-mail to STARProcess@pge.com

Sharing of Information in TPR Process - SCE

Public Information

- TPR Process participants will be served the project spreadsheet and public versions of authorization and procedure documents (document sharing links will be used)
  - SCE will add participants to public directory through a process similar to confidential information discussed below
- Project spreadsheet will also be posted on SCE's website for general accessibility

Confidential Information

- SCE utilizes a Confidential External Site to share sensitive material (submittals, data requests, etc.)
  - Access is managed through Microsoft Authentication

- Requesters must sign an NDA and are required to accept an invitation in order to gain access to SCE's Confidential External Site
  - The process requires SCE to add the new user to its authorized user directory

- Steps to establish initial access:
  1. After confirming the Requester has a signed NDA, SCE adds the individual to its active directory using the Requester's Name, email, and Party Name
  2. The Requester receives an invitation via email (invites@microsoft.com) which they must accept
     1. A Microsoft account linked to the email address provided to SCE is required, and can be established by the Requester at that time if they don't already have one
  3. SCE's Case Admin team sends an email to the Requester to confirm the invitation is accepted
  4. Once the Requester acceptance is complete, Case Admin will share a link with the Requester and access to the Confidential External Site is granted

- Once access is established, individuals that have signed NDAs will receive future links with confidential information as it is made available by SCE

- Current SRP access to confidential information will not automatically transfer to the new TPR Process

Set-up of initial access may take approximately 5-7 business days

TPR Process Schedule (Atch C)

- Overview of data release dates and staggered cycles
- SDG&E's Benchmark Dates for January through May, 2024
- Discussion and Clarification

Data Release Dates in 2024

Transmission Owner	Data Release Date
San Diego Gas & Electric	January 2nd
Pacific Gas and Electric	May 1st
Southern California Edison	June 3rd
San Diego Gas & Electric	July 1st
Pacific Gas and Electric	November 1st
Southern California Edison	December 2nd

SDG&E TPR Process Schedule: January – May 2024

Event	Date
Data released	January 2nd
Stakeholders provide questions and comments	February 16th
Written responses to Stakeholder questions and comments	March 11th
Stakeholders and CPUC provide agenda items for upcoming Stakeholder Meeting	March 18th
Stakeholder Meeting	April 1st
Stakeholders' questions and comments related to the Stakeholder Meeting	April 16th
Written responses to questions and comments related to Stakeholder Meeting	May 7th
*Last day for Stakeholders to submit project-specific, follow-up questions	May 14th
*Written responses to Stakeholder project-specific, follow-up questions	May 29th
Last Day for Stakeholders to submit comments. There is no expectation of written responses.	May 31st

Questions and Comments

Action Items and Next Steps

For more information:

CPUC's TPR Process Home Page

(https://www.cpuc.ca.gov/industries-and-topics/electrical-energy/electric-costs/transmission-project-review-process)

For more information:

TPRProcess@cpuc.ca.gov