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Docket Number:	19-HERS-01
Project Title:	2019 HERS Providers' Application for the 2019 Building Energy Efficiency Standards
TN #:	241112
Document Title:	Workshop Presentation - CHEERS Applications to Use EDDS
Description:	This is the presentation for the staff workshop for CHEERS application to use external digital data sources held on 1/4/2022.
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Organization:	California Energy Commission
Submitter Role:	Commission Staff
Submission Date:	1/4/2022 3:51:59 PM
Docketed Date:	1/4/2022



CHEERS Applications to Use External Digital Data Sources

Staff Workshop

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January 4, 2022



Agenda

- Background
 - External digital data sources (EDDS)
 - Requirements
- CHEERS applications to use EDDS
 - Staff reports
 - Summary of applications
- Review and approval of applications
- Public comments

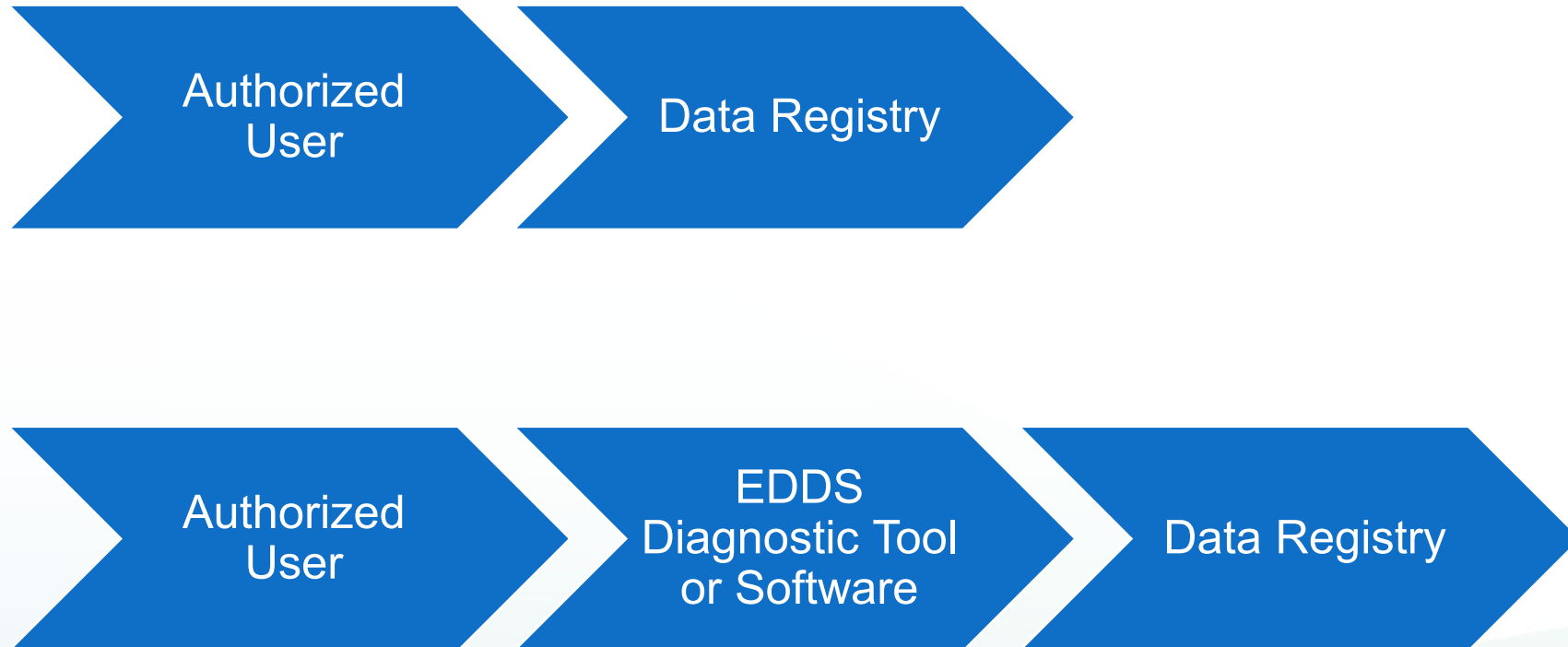


Comments For the Workshop

- **Comments Due: January 19, 2022, by 5:00 PM.**
- Comments can be submitted to:
<https://efiling.energy.ca.gov/EComment/EComment.aspx?docketnumber=19-HERS-01>
- The staff reports, notices, and this presentation are available at Docket 19-HERS-01:
<https://efiling.energy.ca.gov/Lists/DocketLog.aspx?docketnumber=19-HERS-01>



Background: External Digital Data Sources





EDDS Requirements

Joint Appendix JA7.7.1.2

- JA7.7.1.2.1 – EDDS data exchange requirements
- JA7.7.1.2.2 – EDDS types

Joint Appendix JA7.8

- Requirements for submittal of EDDS applications
- Self-testing of data exchange features
- Disclosure of working agreements between EDDS and data registry provider
- Types of Approval



CHEERS EDDS Applications

- Energuy BOSS EDDS Software
- Archon Energy Solutions Compass EDDS Software
- Seeking approval of EDDS applications per JA7.8.3.2



Summary of EDDS Applications

- Staff reports
 - Staff Report CHEERS Application to Use the Energy BOSS EDDS
 - Staff Report CHEERS Application to Use Archon Energy Solutions Compass EDDS
 - Available on the 19-HERS-01 Docket at:
<https://efiling.energy.ca.gov/Lists/DocketLog.aspx?docketnumber=19-HERS-01>



EDDS Applications – Cover Letter and Introduction

- Cover letter
 - General summary of proposed changes to use EDDS for data input to CHEERS data registry
- Introduction
 - Signed certifications that requirements in Title 20 and JA7 will be met
 - Contact information for EDDS and Data Registry Provider
 - Summary of features of EDDS service
 - List of compliance documents to receive data from EDDS



EDDS Applications – EDDS Detailed Description

- Procedural description of process for using EDDS and Data Registry:
 - Uploading compliance data into EDDS service
 - Transmission of compliance data from EDDS service to data registry
 - Reviewing and signing compliance documentation that uses the transmitted data
 - Example screenshots of EDDS user interface are included



EDDS Applications – Data Exchange Procedures

- Compliance data are input into EDDS user interface using keyed-in data entry
- Authorized user logs into CHEERS data registry to initiate data exchange
- User manually initiates data exchange from within data registry user interface
- Exchanged data are validated using approved XML schema



EDDS Applications – Best Practices for Secure Data Exchange

- EDDS data upload and storage use industry standard encryption protocols
- EDDS service and database hosted on cloud platforms that conform to industry standard security compliance programs
- Security best practices:
 - Information technology administration, access management, data backups, employee education, implementation of security software
- Data conform to approved CEC XML schema for each compliance document



EDDS Applications – Self-testing Procedures and Summary of Results

- List of compliance documents that will use transmitted data from EDDS
- Testing for each compliance document includes:
 - Verification of data input using EDDS user interface
 - Data transmission from EDDS to data registry
 - Generation of registered compliance documents



EDDS Applications – Data Registry and EDDS User Instructions

- Data registry user manual
 - Instructions on use of data registry for completing compliance documentation
- EDDS user instructions
 - Instructions on use of EDDS user interface for compliance data input and data exchange procedures for users of EDDS and data registry



EDDS Applications – Working Agreement

- The working agreement includes:
 - Parties involved in working agreement
 - Certifies all requirements for data exchange in JA7.7.1.2.1 have been met
 - Summarizes specifications of proposed EDDS service, technologies, software used



EDDS Live Demonstrations

- Demonstrations of EDDS features and specifications
 - Demonstrate process for data input through completion of forms
 - Each form will be demonstrated
 - CEC staff will evaluate and verify EDDS and data registry functionality



EDDS Applications – Review and Approval

- Applications (only non-confidential portions) have been made available for public comment
- Public Comment period ends January 19, 2022
- CEC staff will complete evaluation and develop recommendation regarding approval by February 2022



Thank You!

