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CEC-70 (Revised 7/22)

*IN THE MATTER OF:**Load Management Standards
Implementation*

DOCKET NO. 23-LMS-01

Load Management Standards
Implementation: Development of the Single
Statewide Rate Access Tool

Load Management Standards Implementation Development of the Single Statewide Rate Access Tool

Background and Discussion

On October 12, 2022, the California Energy Commission (CEC or Commission) adopted the Load Management Standards (LMS) regulation (20 California Code of Regulations section 1621, et seq.). The LMS regulation took effect on April 1, 2023. Title 20 of California Code of Regulations, Division 2, Chapter 4, Article 5, Section 1623(c) (included in Appendix A) requires Large investor-owned utilities (Large IOUs), Large publicly-owned utilities (Large POUs), and Large community choice aggregators (Large CCAs), collectively the “regulated parties”, “develop a single statewide standard tool for authorized rate data access by third parties that is compatible with each of those entities' systems”. This tool is due to the CEC before October 1, 2024, for approval at a Business Meeting.

Broadly, the single statewide rate access tool is required so electricity customers or their authorized third-party agents can:

1. Look up the rate identification number(s) (RINs) that apply to the customer’s premises
2. Look up the RIN(s) corresponding to the rates that the customer is eligible to switch to
3. Provide estimated average or annual bill amounts on the customer’s current rate and rates they are eligible for
4. Allow the customer or their authorized third party to change the rate the customer is on

On June 8, 2023, CEC staff provided a schedule of the key LMS adoption and compliance dates including the LMS regulatory timeline

(<https://efiling.energy.ca.gov/GetDocument.aspx?tn=250547&DocumentContentId=85322>) to support regulated parties in complying with California Code of Regulations, Title 20, Division 2, Chapter 4, Article 5, Sections 1621-1625. Large IOUs and Large POUs are required to submit complete LMS compliance plans by October 1, 2023, and Large CCAs must submit complete LMS compliance plans by April 1, 2024. Compliance plans will include detail on how the regulated parties are planning to

comply with the LMS including plans and schedules for designing, developing, deploying, and maintaining the single statewide rate access tool. CEC staff have authority to host public meetings to provide transparency for mandated activities.

Beginning in June 2023, CEC staff contacted the regulated parties several times requesting status updates on the progress of designing and developing the single statewide rate access tool. Those communications did not indicate timely progress is occurring.

Conclusion

The public and CEC need transparency in the RIN tool development to be able to track progress and provide appropriate input on the design and implementation of the single statewide rate lookup tool. To further these goals, CEC staff:

1. Request the regulated parties post plans, schedules, and monthly status reports on the progress of the single statewide rate access tool design and development to the LMS implementation docket 23-LMS-01 (<https://efiling.energy.ca.gov/Lists/DocketLog.aspx?docketnumber=23-LMS-01>) until such time as the tool is fully implemented and publicly available. A single status report submission from multiple regulated parties is allowed.
2. Will schedule public meetings to solicit public input and provide opportunities for regulated parties to inform the CEC and the public of tool design and development progress. These meetings will be publicly noticed as required by law¹.

¹ California Code of Regulations, title 20, section 1209.

Appendix A: Load management Standards Section 1623(c)

1623(c) Support Customer Ability to Link Devices to Electricity Rates.

(1) Third-party Access. The Large IOUs, Large POU's and Large CCAs shall develop a single statewide standard tool for authorized rate data access by third parties that is compatible with each of those entities' systems. The tool shall:

(A) Provide the RIN(s) applicable to the customer's premise(s) to third parties authorized and selected by the customer;

(B) Provide any RINs, to which the customer is eligible to be switched, to third parties authorized and selected by the customer;

(C) Provide estimated average or annual bill amount(s) based on the customer's current rate and any other eligible rate(s) if the Large IOU, Large POU or Large CCA has an existing rate calculation tool and the customer is eligible for multiple rates;

(D) Enable the authorized third party to, upon the direction and consent of the customer, modify the customer's applicable rate to be reflected in the next billing cycle according to the Large IOU's, Large POU's or Large CCA's standard procedures;

(E) Incorporate reasonable and applicable cybersecurity measures;

(F) Minimize enrollment barriers; and

(G) Be accessible in a digital, machine-readable format according to best practices and standards.

(2) The Large IOUs, Large POU's and Large CCAs shall submit the single statewide standard tool developed pursuant to Section 1623(c)(1) to the Commission for approval at a Business Meeting.

(A) The tool must be submitted within eighteen (18) months of April 1, 2023.

(B) The Executive Director may extend this deadline upon a showing of good cause.

(C) The Large IOUs, Large POU's and Large CCAs shall describe a single set of terms and conditions they intend to require of third parties using the single statewide standard tool.

(3) Upon Commission approval the Large IOUs, Large POU's and Large CCAs shall implement and maintain the tool developed in Section 1623(c)(1).

(4) Customer Access. No later than one (1) year after April 1, 2023, each Large IOU, Large POU and Large CCA shall provide customers access to their RIN(s) on customer billing statements and online accounts using both text and quick response (QR) or similar machine-readable digital code.

(5) Any changes to the single statewide standard tool, including changes to the terms and conditions, shall be submitted to the Executive Director for approval. The Executive Director shall submit any substantive changes to the Commission for approval at a Business Meeting.