

DOCKETED	
Docket Number:	23-LMS-01
Project Title:	Load Management Standards Implementation
TN #:	253913
Document Title:	UtilityAPI presentation for January 17, 2024 workshop
Description:	N/A
Filer:	Stefanie Wayland
Organization:	California Energy Commission
Submitter Role:	Commission Staff
Submission Date:	1/16/2024 5:54:05 PM
Docketed Date:	1/17/2024

Data Access in CA Today

Josh Keeling

SVP, Product and Market Development

January 17th, 2024

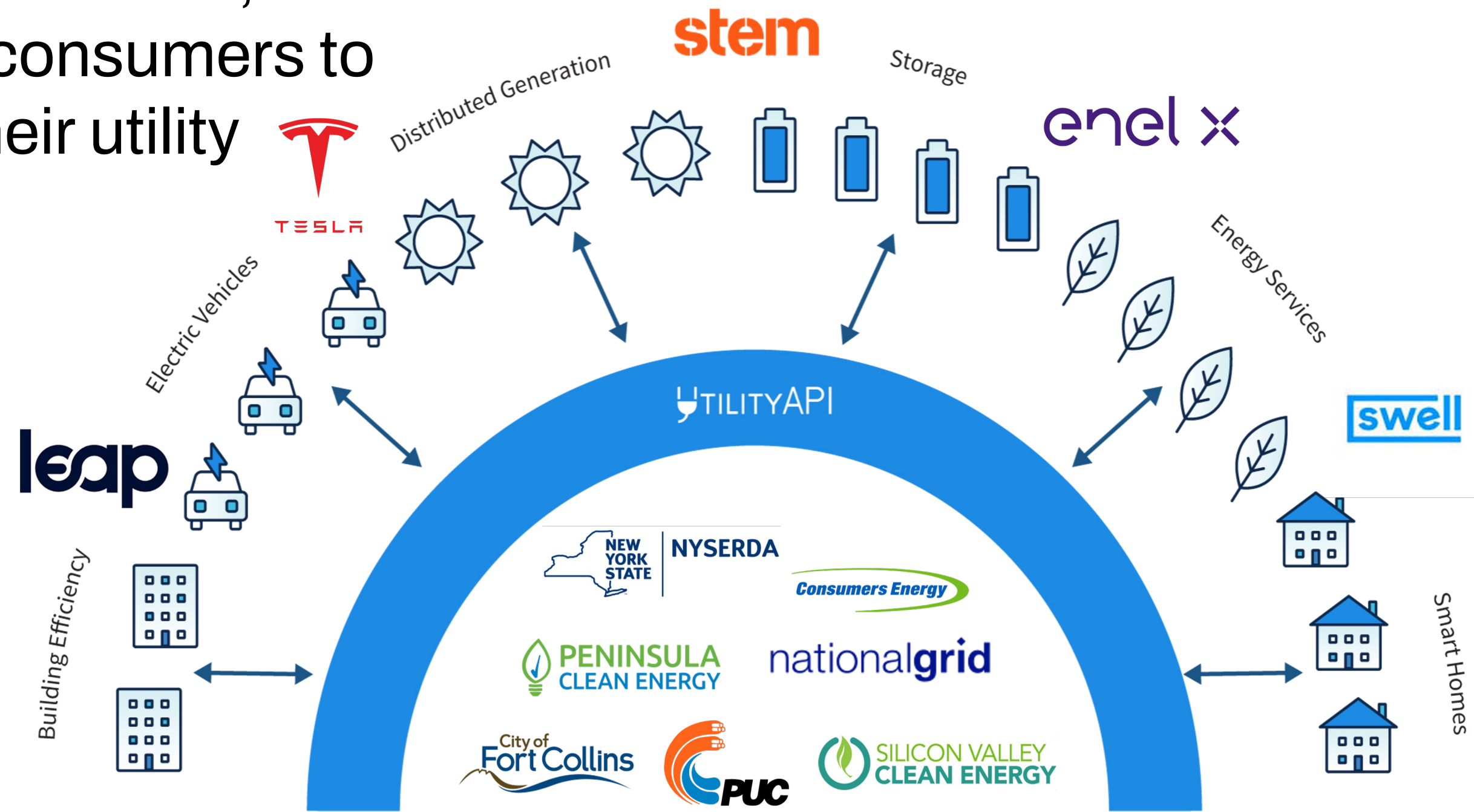




*UtilityAPI's mission is to **unleash** the clean energy revolution by **unlocking** data.*

How we unlock data.

Our platform enables a secure, and standardized way for consumers to authorize access to their utility data.



UtilityAPI's platform today

Meters covered

- 100-75%
- 75-50%
- 50-25%
- 25-1%
- No coverage

UTILITYAPI

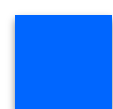
100-75%

75-50%

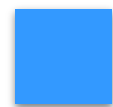
50-25%

25-1%

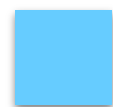
No coverage



100-75%

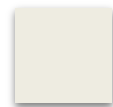


75-50%



50-25%

25-1%



No coverage

California's Load Management Standard

LMS in Context

- The long term objective of LMS is to create a streamlined process for accessing dynamic rate information.
- Fundamentally, this is an extension of CA's broader & far reaching efforts to make accessing customer utility data seamless.
- LMS is wholly reliant on a well-functioning, integrated ecosystem that allows timely, secure, and seamless access to customer utility data and systems.

Barriers to high-quality data access today

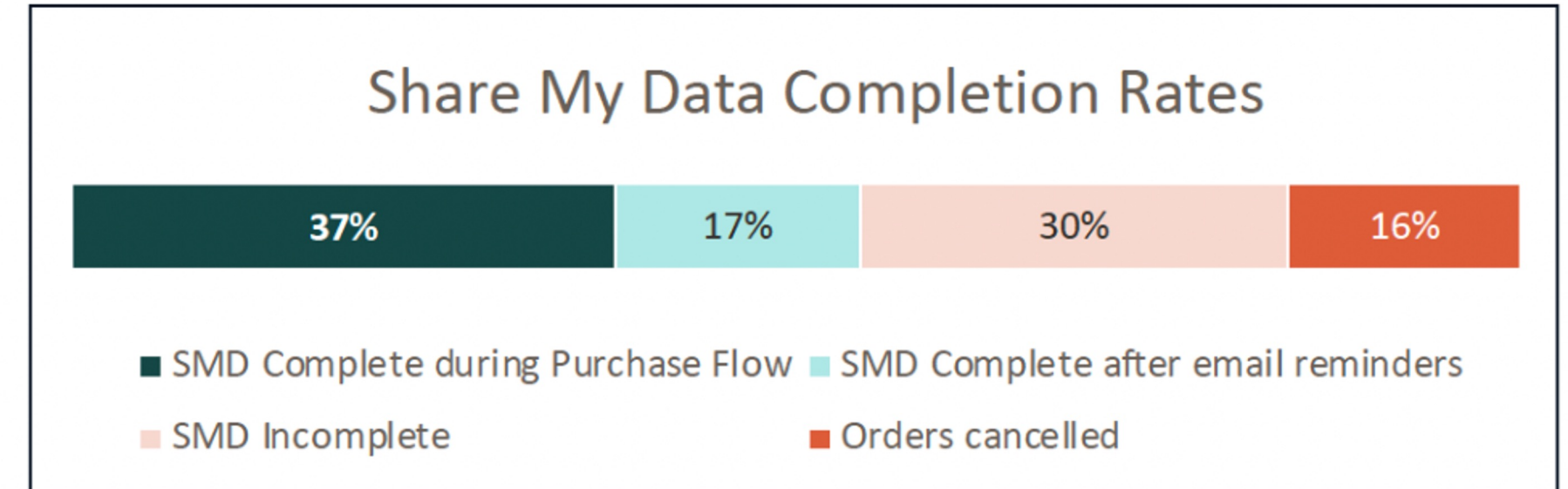
- Inconsistent implementation of the Green Button standards by the IOUs;
- Lack of accountability for the Green Button platforms;
- Low ongoing awareness of issues amongst staff at utilities, CPUC, CEC.
- Split incentive issues between customer, solution providers, utilities, and the state.
- Jurisdictional ambiguity between utility, state, market, and federal requirements

Challenges with Share My Data

The SMD process disincentivizes participation, is inefficient, and drives incremental costs

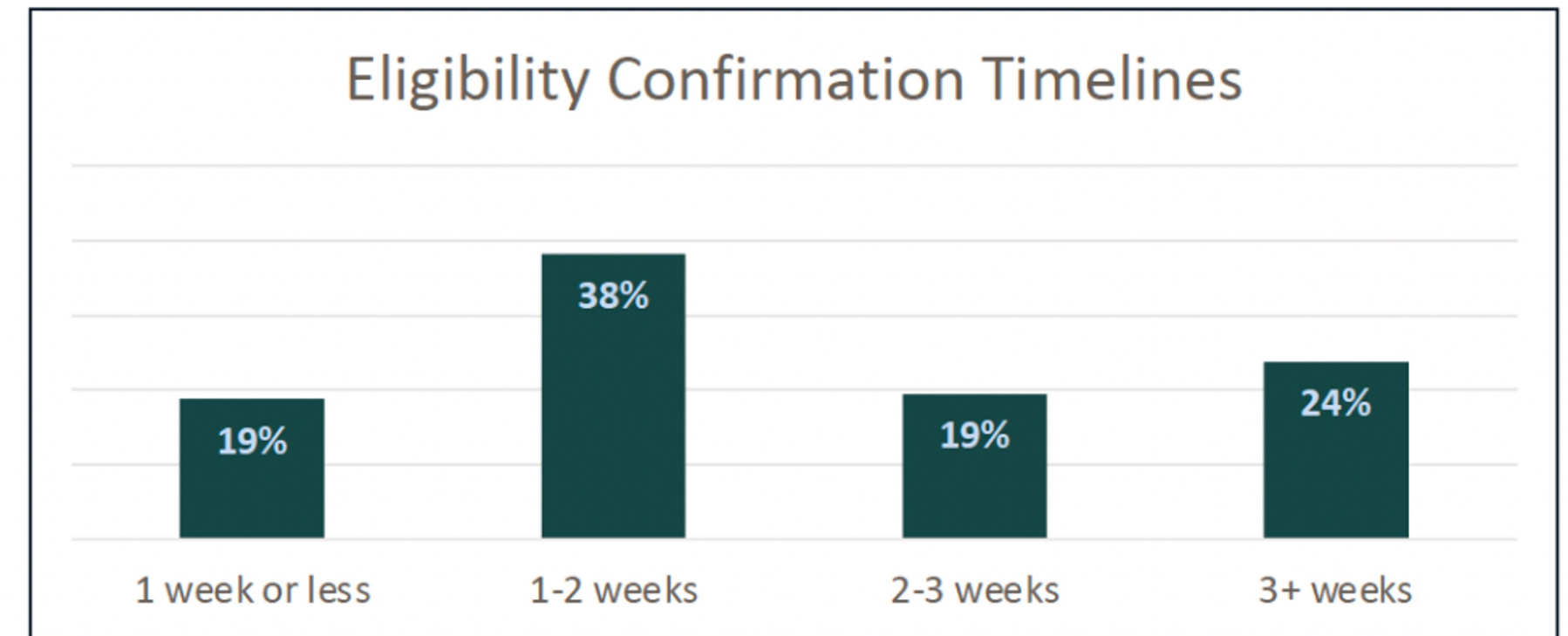
Program Context

Since July 2023, ecobee has offered eligible customers in California's hot climate zone (zone 9 – 15) a \$10 ecobee3 lite (regularly \$149.99) or a \$149.99 ecobee Smart Thermostat Premium (regularly \$249.99) when they enroll in the Cali ecosave program, a voluntary community energy savings program. As of November 2023, 502 devices were purchased by customers to participate in the program.



Key Pain Points

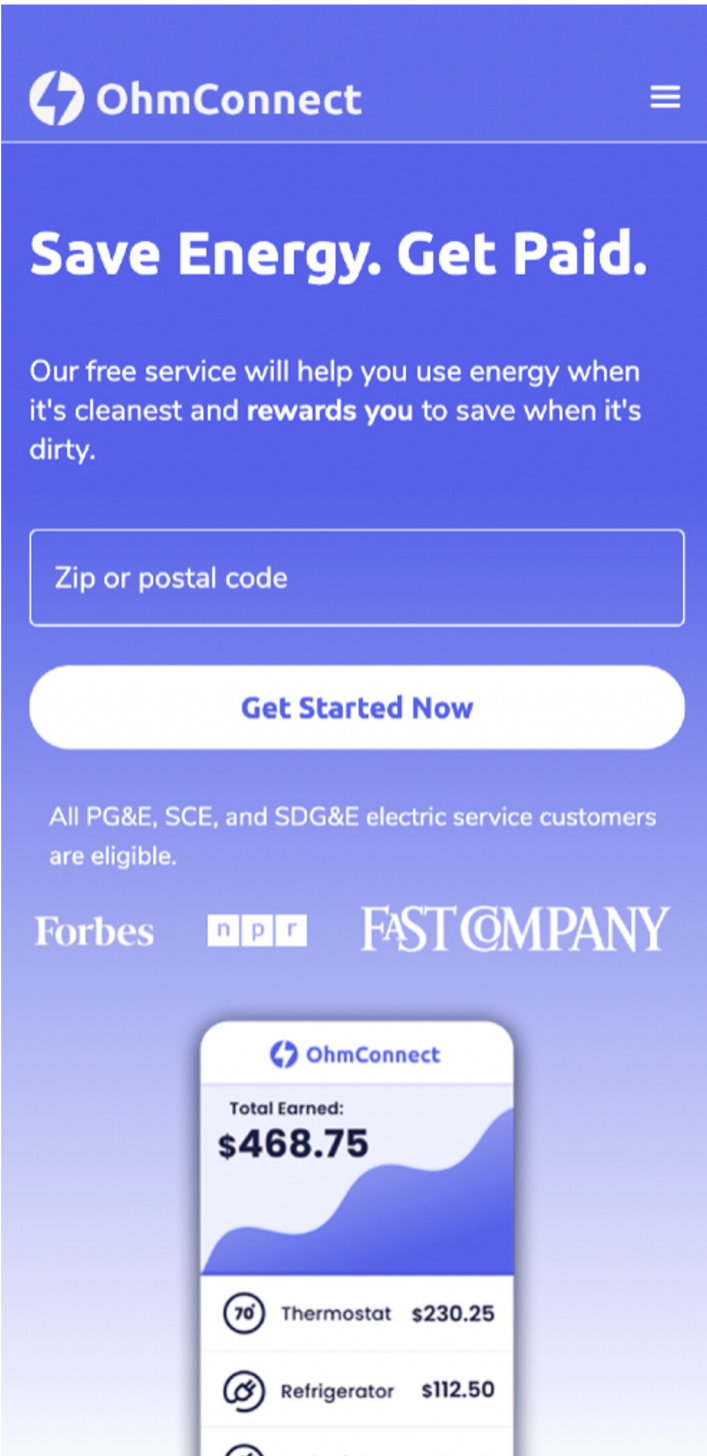
- 1. High customer drop-off during initial purchase flow.**
Only **37%** of customers completed the SMD process during the first purchase flow. 46% did not complete the SMD process (with 16% cancelling their order due to complexity).
- 2. Long lag times to confirm a customer's eligibility.**
Average of **17** days to confirm customer eligibility, with 81% of cases taking longer than a week.
- 3. High costs from managing customers questions and complaints.**
126 Customer Support calls received to inquire about eligibility and handle cancellations.



*Example used with permission from ecobee

Click-Through Process is Cumbersome, Costly: 50%+ Drop-off

Solution: eliminate/simplify click-through; ensure data privacy through contract between utilities and third parties



Link your Utility account

Connect your Utility account to measure your energy savings for rewards.

PG&E

SCE

SDGE

...

Taking you to PG&E...

You'll be asked to Sign In to Share your electricity data with OhmConnect.

Then we'll bring you back to complete setting up so you can start saving energy.

Need help?
[See frequently asked questions.](#)

By signing up, you agree to our [Terms and conditions.](#)

Fake utility logo undermines consumer confidence

Share My Data

Authorize Access to Your Data

You can authorize a company access to your data. Read the Terms & Conditions carefully before authorizing access to your data. **Please note:** PG&E has not conducted security reviews on the companies participating in this program.

SIGN IN

GUEST ACCESS

USERNAME

PASSWORD

[Cancel](#)

SIGN IN

Forgot [Username](#) or [Password](#)

Add new authorization ?

NEXT

The following may be a partial list of your existing authorizations. View the [complete list](#).

Current Authorizations

OhmConnect, Inc

Created on: 07/31/2019

Utility account info, password, scary legal language deter sign-ups

*Example used with permission from Ohmconnect

Untimely and Unplanned Outages Frustrate Customer Choice

Solution: require Service Level Agreements, which are standard in the technology industry

Utility Outage Hours by Year

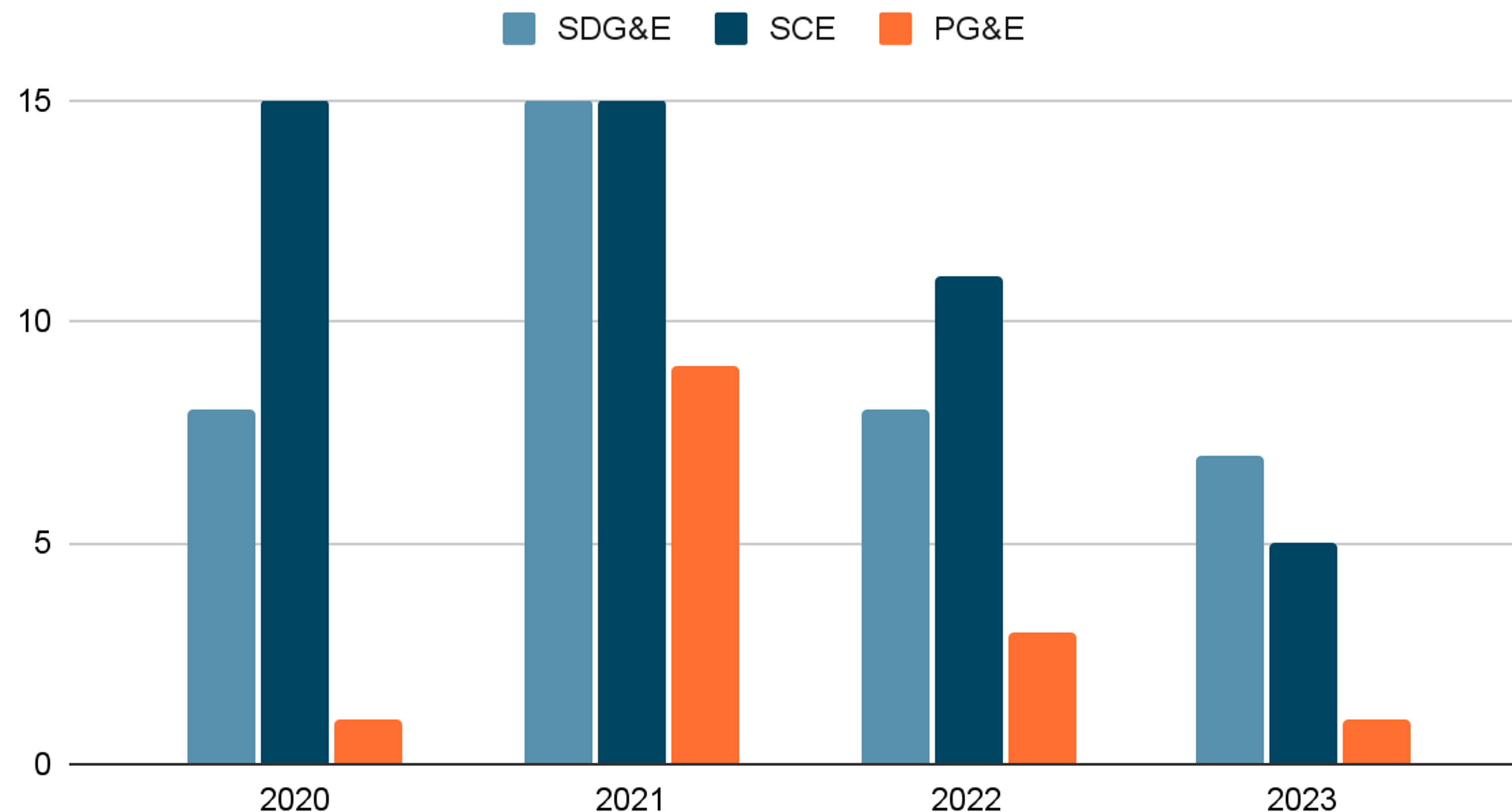
	YEAR	PGE	SCE	SDGE
1	2018	30.25	68	93.5
2	2019	166.1667	489.7833	1741.85
3	2020	136	194.3	83.7833
4	2021	248.0833	435.55	703.9167
5	2022	60.4167	133.1667	164.2333

*Example used with permission from Ohmconnect

Missing, inaccurate data costly; erodes customer experience

Solution: hold utilities accountable for errors, missing data

Utility Data Issues



Recent example: SDG&E data from 6/7/23-8/7/23 was off by 15 minutes.

This issue was first identified by an OhmConnect customer. Ultimately, more than 200 customers identified this problem. Took 3 months to resolve

*Example used with permission from Ohmconnect

Today's Success & Failure

Success

Growing adoption of
standard integration tools
with the growth of
electrification, grid mod,
and DERs

Failure

Highly inconsistent Green
Button Connect
deployments, often
unreliable and
burdensome

The background is split diagonally from the top-left to the bottom-right. The upper-left portion is white, and the lower-right portion is a solid blue. In the top-right corner of the blue area, there are several thin, white, concentric wavy lines that curve towards the right edge.

**Where should we be
going?**

Recommendations

IOUs, POU, CCAs

Require ***certified*** Green Button platforms that can be integrated to with MIDAS & support statewide initiatives, such as the statewide rate tool.

Statewide

Deploy statewide Green Button platform to ensure a common backstop and to support statewide/federal programs (SGIP, BUILD, IRA, etc)

Data Access Principles

- ✓ Security, ease of use, and consistency are paramount
- ✓ Customer sign-up (and disenrollment) should be simple, fast, automated
- ✓ Data authorization process should meet technology industry standards, not individual utility standards.
- ✓ Data (settlement, forecasting, rates, bills, usage) must be timely and accurate
- ✓ Consolidating integration points and methods critical to driving scale

Performance Requirements

All platforms must be held accountable to metrics on:

- Accuracy
- Timeliness
- Completeness
- User experience
- Errors/outages
- Support
- Onboarding

Questions?

Josh Keeling

SVP, Product and Market Development

josh@utilityapi.com



Appendix Slides

Case Study: Data Hive

SVCE's Data Hive

Seamless platform to easily and securely access data for a variety of use cases



Quick Start Guide

[Standard](#) | [Ink Saver](#)

Questions?

We're happy to answer questions and troubleshoot issues.

Simply submit a support request using the button below, or email support@svce.utilityapi.com

SUBMIT A SUPPORT REQUEST

[Video tutorial: How to Register as a Third Party](#)

[Video tutorial: How to Register as a Commercial User](#)

Securely Request or Share Utility Data

Are you...

- a **business** looking for standardized, easy-to-access, free energy data in order to serve your customer:
- a **large commercial customer** who needs access to your energy data in order to better manage your u
- a **residential customer**, ready to start a clean energy project, such as adding solar and storage or inst

SVCE and [UtilityAPI](#) created the SVCE Data Hive to make it easier and faster for you to do all thos gives you free, authorized, secure access to energy data. You can get your own data, or your cust consent. The Data Hive will manage the entire process. **All you have to do is register. Then simpl**

REGISTER AS A THIRD PARTY

For Third Parties / Contractors

To request data from SVCE customers, you must regi company. [Read](#) or [view a tutorial](#) on how to register a customers. If you're already a UtilityAPI customer, [go](#) register via your settings.

[Is my customer in SVCE territory?](#)

REGISTER AS A COMMERCIAL USER

For Cities & Commercial Customers

Register as a commercial user to request your own data from the meters associated with your accounts. [Read](#) or [view a tutorial](#) on how to register and request your data.

BROWSE THE DIRECTORY

For Residential Customers

You can always share your data with an authorized third party. You must authorize data sharing with a specific third party before any data can be shared. Manage or revoke your authorizations at [My Authorizations](#).

Verification Required

In order to continue, we need to verify your identity. Please select from the options below. Please note that a unique match to a customer account is required to proceed. Therefore, when in doubt, use the customer account number to authenticate.

 I know my account number

 Find my account using my phone number

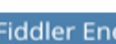
 Find my account using my email

 Find my account using my address

[Terms](#) | [Privacy](#) | [Help](#) | Powered by [UtilityAPI](#)

Robust Ecosystem of Participants

Registrant list from SVCE Data Hive

 OtrConnect, Inc. See Profile	 Simmitri Inc. See Profile	 ABSolar&Roofing/Clean Solar Solutions See Profile	 Recurve Analytics, Inc. See Profile	 Ivy Energy See Profile	 FresYes Energy See Profile	 EDF Innovation Lab See Profile	 Green Solar Technologies See Profile	 One Energy Solutions See Profile	 King Energy See Profile	 California Solar Integrators, Inc. See Profile	 intertek See Profile
 Pono Home, Inc. See Profile	 Clean Energy Advocates See Profile	 UTILITY REDUCTION SOLUTIONS See Profile	 Community Energy Labs See Profile	 Narola Infotech See Profile	 PowerFlex See Profile	 Orion Power & Co-Sun See Profile	 TerraVerde Energy LLC See Profile	 Gold Rush Energy Solutions See Profile	 Pace NRG Solar See Profile	 Sysenco Energy Solutions See Profile	 ENGIE Storage (formerly Green Charge...) See Profile
 SunWorks See Profile	 Next Energy See Profile	 Safari Energy See Profile	 Siemens See Profile	 FirstPV Inc dba SolarUnion and partn... See Profile	 Cenergy Power See Profile	 Deep Green Solar See Profile	 Royal Industrial Solutions See Profile	 Smart Solar Solutions USA See Profile	 Gemini Energy Solutions See Profile	 WSP See Profile	 Improve My House See Profile
 ChargeNet Stations See Profile	 Powur See Profile	 Sepiolar See Profile	 Missouri University of Science and Te... See Profile	 Smartrit See Profile	 Sun Up Electric See Profile	 Go Electric Inc. See Profile	 Centrica Business Solutions See Profile	 Aplio Inc See Profile	 TerraVerde Energy LLC See Profile	 Fiddler Energy See Profile	 US Energy Recovery See Profile
 Cool Earth Solar See Profile	 Home Energy Analytics, Inc. See Profile	 Amped Solutions, Inc. See Profile	 Extensible Energy See Profile	 Good Current See Profile	 EVmatch See Profile	 Mbl-Energy See Profile	 Ivy Energy See Profile	 Cupertino City of Cupertino See Profile	 Cinnamon Energy Systems See Profile	 Sandbar Solar & Electric See Profile	 American Solar See Profile
 Enact systems See Profile	 Paired Power See Profile	 Synergy Power See Profile	 Arrow Energy Solar Systems See Profile	 KW HOUR ENERGY See Profile	 Stable Solar, Inc. See Profile	 RAI Energy International, Inc. See Profile	 Clean Coalition See Profile	 Enel X See Profile	 TeMix Inc. See Profile	 1-800 Battery See Profile	 Stem, Inc. See Profile
 Unico Solar Investors See Profile	 Solar CFO See Profile	 SOLAR POWER SUPPLY See Profile	 City of Milpitas See Profile	 Charge Bias Inc See Profile	 REC Solar See Profile	 Aeterna Energy, LLC See Profile	 SolarNorcal, LLC See Profile	 SunWork See Profile	 Gridium See Profile	 Sunrun See Profile	 PropFacts See Profile
 Climate Solutions Net See Profile	 SMUD See Profile	 EVA Green Power See Profile	 Green Solutions Inc See Profile	 Solar Technologies See Profile	 Resort Energy Ventures See Profile	 Buildings Alive Pty Ltd See Profile	 Voltus See Profile	 Pace Avenue See Profile	 Optony Inc. See Profile	 Vendora Partners See Profile	 Electric Fish See Profile
 BEST See Profile	 ev.energy See Profile	 Sun Light & Power See Profile	 Integral Group See Profile	 CalCom Energy See Profile	 ENGIE North America See Profile	 WATT ELECTRIC, INC. See Profile	 CLEAResult See Profile	 Nanogrid Technologies, PBC See Profile	 Pacifico See Profile	 Brighton Solar See Profile	 VGG Systems See Profile
 arbnco See Profile	 Pathion, Inc. See Profile	 Zappyride See Profile	 Pick My Solar Corp. See Profile	 Solar Price Discovery Inc See Profile	 Cobalt Power Systems See Profile	 Luminalt See Profile	 Rio Grande Renewables, LLC See Profile	 First Edison See Profile	 Solar Data Pros See Profile	 revalue.io See Profile	 CommEnergy See Profile

How do data access platforms get used?

Who?

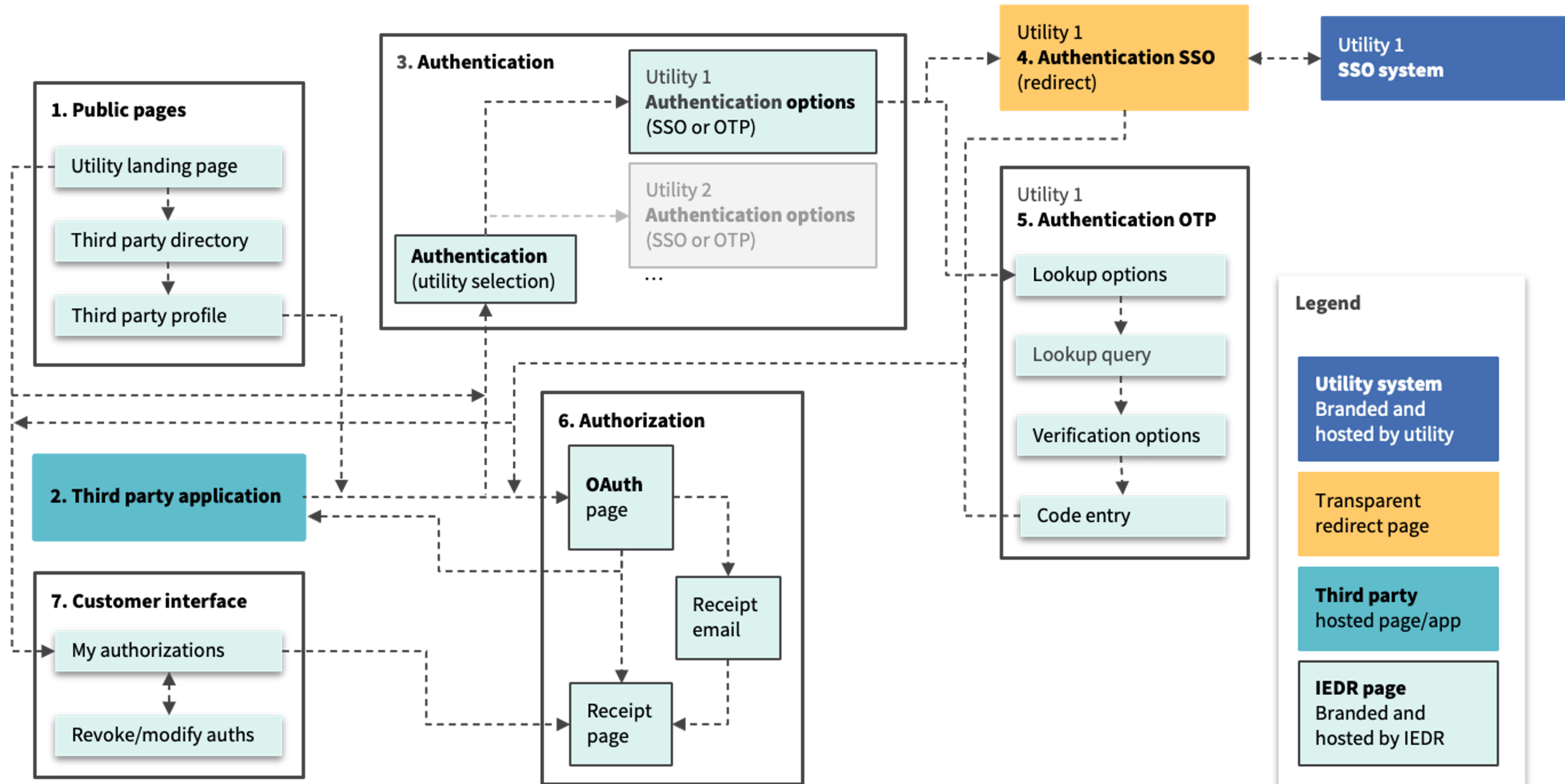
- DER developers
- Community-based organizations
- Municipal/state agencies
- Program administrators
- Aggregators
- Modeling tools
- EVSE providers
- Carbon accounting firms
- Financial institutions
- Property management
- Energy auditors

Why?

- Solar/storage sizing
- VPP settlement
- Energy performance contracting
- Interconnection streamlining
- Program targeting and deployment
- Eligibility determination
- ESG and benchmarking
- Consolidated billing/virtual net metering
- EV charging development
- Ongoing rate management
- Customer engagement

Data Platform Reference Architectures

What does scalable deployment look like at a utility/LSE level?



What does scalable deployment look like at state or regional level?

