| DOCKETED         |  |
|------------------|--|
| Docket Number:   | 19-PSDP-01   |
| Project Title:   | Power Source Disclosure Program - 2018   |
| TN #:            | 228328   |
| Document Title:  | 2018 Power Source Disclosure Annual Reporting Guidance Webinar Slides                            |
| Description:     | Staff hosted the 2018 Power Source Disclosure Annual Reporting Guidance Webinar on May 16, 2019. |
| Filer:           | Ariel Lee  |
| Organization:    | California Energy Commission   |
| Submitter Role:  | Commission Staff   |
| Submission Date: | 5/21/2019 8:58:42 AM   |
| Docketed Date:   | 5/21/2019  |

# 2018 Power Source Disclosure Annual Reporting Guidance



Ariel Lee
May 16, 2019
California Energy Commission



- Power Source Disclosure (PSD) Legislative History
- PSD Definitions
- PSD Data Reporting Overview
- 2018 PSD Annual Report Review
- 2018 Schedule and Submittal
- Power Content Label
- Audit Requirements



# **PSD Legislative History**

SB 1305
Created the PSD

Created the PSD Program

S AB 162

Amendments to the PSD Program included the requirement to report unspecified sources of power

9 AB 1110

Further amended the PSD Program to require greenhouse gas emissions reporting



The Power Source Disclosure program was established to provide "accurate, reliable, and simple-to-understand information on the sources of energy that are used to provide electric services" to California consumers (Public Utilities Code Section 398.1(b)).





- "Retail supplier" means an entity that offers an electric service product for sale to retail consumers in California<sup>1</sup>
- "Electric service product" means the electrical energy produced by a generating facility that a retail seller offers to sell to consumers in California under terms and conditions specific to an offer or to a tariff

<sup>1</sup>PSD Program Regulations, Section 1391(r)

<sup>2</sup>PSD Program Regulations, Section 1391(b)



- Annual Reports are Provided to the Energy Commission June 1 Each Year
- Power Source Disclosure Program Requires a Separate Annual Report for Each Electric Service Product Offered
- Reporting of Procurement and Generation from the Prior Year
  - Specific and Unspecified
- Specific Purchases
  - Traceable to specific generating facilities by any auditable contract trail or equivalent, such as a tradable commodity system
  - Specific purchases include electrical transactions from facilities owned or controlled by the retail supplier
  - Retail suppliers may rely on annual data to meet this requirement, rather than hour-by-hour matching of loads and resources



# **PSD Data Reporting**

- Specific Purchases
  - Categories Defined in Regulation
    - Eligible renewable
    - Coal
    - Large Hydroelectric
    - Natural gas
    - Nuclear
    - Other





### **PSD Data Reporting**

- Eligible Renewable Defined as Certified for CA Renewables Portfolio Standard
- Eligible Renewable
  - Biomass and Biowaste
  - Geothermal
  - Eligible Hydroelectric
  - Solar
  - Wind
- Unspecified Power
  - Electricity that is not traceable to a specific generation facility



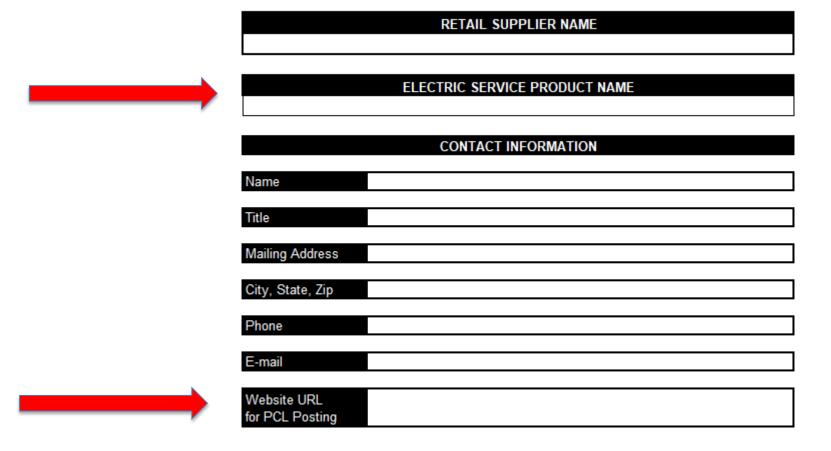
- Total Retail Sales
  - Verified with Other Sources
- Comparison of Total Purchases and Sales
- Preliminary Information for Power Content Label

|                          | Net Purchases<br>(MWh)                  | Percent of Total<br>Retail Sales (MWh) |
|--------------------------|---|--|
| Specific Purchases       |   |  |
| Renewable                | _                                       | #DIV/0!                                |
| Biomass & Biowaste       |   | #DIV/0!                                |
| Geothermal               |   | #DIV/0!                                |
| Eligible Hydroelectric   |   | #DIV/0!                                |
| Solar                    |   | #DIV/0!                                |
| Wind                     |   | #DIV/0!                                |
| Coal                     |   | #DIV/0!                                |
| Large Hydroelectric      |   | #DIV/0!                                |
| Natural Gas              |   | #DIV/0!                                |
| Nuclear                  | *************************************** | #DIV/0!                                |
| Other                    | *************************************** | #DIV/0!                                |
| Total Specific Purchases | 2                                       | #DIV/0!                                |
| Unspecified Power (MWh)  |   | #DIV/0!                                |
| Total                    | -                                       |  |
| Total Retail Sales (MWh) |   |  |



## 2018 PSD Annual Report Template

#### GENERAL INSTRUCTIONS





### 2018 PSD Annual Report - Schedule 1

#### ANNUAL REPORT TO THE CALIFORNIA ENERGY COMMISSION: Power Source Disclosure Program

For the Year Ending December 31, 2018
SCHEDULE 1: POWER PROCUREMENTS AND RETAIL SALES
Applicable to: Retail Suppliers

INSTRUCTIONS: Submit a separate annual report for each electric service product offered in 2018. List all purchases (Specific and Unspecified) made ONLY in the 2018 calendar year. Add additional rows if needed. If a purchase was for unbundled RECs include the term "REC Only" in parentheses after the facility name in the Facility Name column, and categorize the power as the fuel type of the generating facility from which the unbundled REC was derived. If power was purchased through a transaction that expressly transferred energy only and not the RECs associated with that energy, identify the power as "Unspecified Power" in the Fuel Type column. If purchased power was from a renewable electrical generation facility that is not certified for participation in California's RPS Program, identify the Fuel Type as "Other".

| ALL PROCUREMENTS (Specific and Unspecified) |             |           |                                    |        |                 |        |          |                          |                                       |                     |
|---|-------------|-----------|------------------------------------|--------|-----------------|--------|----------|--------------------------|---------------------------------------|---------------------|
| Facility Name                               | Unit<br>No. | Fuel Type | Location<br>(State or<br>Province) | RPS ID | ¥REGIS<br>GU ID | EIA ID | FERC QF  | Gross<br>MWh<br>Procured | MWh<br>Resold or<br>Self-<br>Consumed | Net MWh<br>Procured |
|   |             |           |                                    |        |                 |        |          |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |          |                          |                                       | 0                   |
|   | _           |           |                                    |        |                 |        |          |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |          |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |          |                          |                                       | 0                   |
|   | _           |           |                                    |        |                 |        |          |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |          |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |          |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |          |                          |                                       | 0                   |
| Retail Supplier Name: Total Net Purchases   |             |           |                                    |        |                 |        |          | Purchases                |                                       |                     |
| Electric Service Product Name:              |             |           |                                    |        |                 |        | Total Re | tail Sales               |                                       | ]                   |



# 2018 PSD Annual Report - Schedule 1

| ALL PROCUREMENTS (Specific and Unspecified) |             |           |                                    |        |                 |        |              |                          |                                       |                     |
|---|-------------|-----------|------------------------------------|--------|-----------------|--------|--------------|--------------------------|---------------------------------------|---------------------|
| Facility Name                               | Unit<br>No. | Fuel Type | Location<br>(State or<br>Province) | RPS ID | WREGIS<br>GU ID | EIA ID | FERC QF      | Gross<br>MWh<br>Procured | M∀h<br>Resold or<br>Self-<br>Consumed | Net MWh<br>Procured |
|   |             |           |                                    |        |                 |        |              |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |              |                          | <del> </del>                          | 0                   |
|   |             |           |                                    |        |                 |        |              |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |              |                          |                                       | 0                   |
|   |             |           | -                                  |        |                 | ļ      | <u> </u>     | <u> </u>                 |                                       | 0                   |
|   |             |           |                                    |        |                 |        | <del> </del> | <u> </u>                 |                                       | 0                   |
|   |             |           |                                    |        |                 |        | 1            |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |              |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |        |              |                          | ļ                                     | 0                   |
|   |             |           |                                    |        |                 |        |              |                          | <b> </b>                              | 0                   |
|   |             |           |                                    |        |                 |        |              |                          |                                       |                     |
| Retail Supplier Name:                       |             |           |                                    |        |                 |        | Total Net    | Purchases                | -                                     |                     |
|   |             |           |                                    |        |                 |        |              |                          |                                       | -                   |
| Electric Service Product Name:              |             |           |                                    |        |                 | ]      | Total Re     | tail Sales               |                                       |                     |



# 2018 PSD Annual Report - Schedule 1

| ALL PROCUREMENTS (Specific and Unspecified) |             |           |                                    |        |                 |          |           |                          |                                       |                     |
|---|-------------|-----------|------------------------------------|--------|-----------------|----------|-----------|--------------------------|---------------------------------------|---------------------|
| Facility Name                               | Unit<br>No. | Fuel Type | Location<br>(State or<br>Province) | RPS ID | WREGIS<br>GU ID | EIA ID   | FERC QF   | Gross<br>MWh<br>Procured | M∀h<br>Resold or<br>Self-<br>Consumed | Net MWh<br>Procured |
|   |             |           |                                    |        |                 |          |           |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |          |           |                          | <del> </del>                          | 0                   |
|   |             |           |                                    |        |                 |          |           |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |          |           |                          |                                       | 0                   |
|   | _           |           |                                    |        |                 |          | <b>.</b>  |                          |                                       | 0                   |
|   | $\vdash$    |           |                                    |        |                 | <b>-</b> | 1         |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |          |           |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |          |           |                          |                                       | 0                   |
|   |             |           |                                    |        |                 |          |           |                          | ļ                                     | 0                   |
|   |             |           |                                    |        |                 |          |           |                          | <b> </b>                              | 0                   |
|   |             |           |                                    |        |                 |          |           |                          |                                       |                     |
| Retail Supplier Name:                       |             |           |                                    |        |                 |          | Total Net | Purchases                |                                       |                     |
|   |             |           |                                    |        |                 | -        |           |                          |                                       | -                   |
| Electric Service Product Name:              |             |           |                                    |        |                 | ]        | Total Re  | tail Sales               |                                       |                     |



### 2018 PSD Annual Report – Schedule 2

|                          | Net Purchases<br>(MWh) | Percent of Total<br>Retail Sales (MWh) |
|--------------------------|------------------------|--|
| Specific Purchases       | _                      |  |
| Renewable                | <u>-</u>               | #DIV/0!                                |
| Biomass & Biowaste       |                        | #DIV/0!                                |
| Geothermal               |                        | #DIV/0!                                |
| Eligible Hydroelectric   |                        | #DIV/0!                                |
| Solar                    |                        | #DIV/0!                                |
| Wind                     |                        | #DIV/0!                                |
| Coal                     |                        | #DIV/0!                                |
| Large Hydroelectric      |                        | #DIV/0!                                |
| Natural Gas              |                        | #DIV/0!                                |
| Nuclear                  |                        | #DIV/0!                                |
| Other                    |                        | #DIV/0!                                |
| Total Specific Purchases | -                      | #DIV/0!                                |
|                          |                        |  |
| Unspecified Power (MWh)  |                        | #DIV/0!                                |
|                          |                        |  |
| Total                    | -                      |  |
|                          |                        | _                                      |
| Total Retail Sales (MWh) | -                      | ]                                      |



### 2018 PSD Annual Report - Attestation

#### ANNUAL REPORT TO THE CALIFORNIA ENERGY COMMISSION:

Power Source Disclosure Program For the Year Ending December 31, 2018

#### ATTESTATION FORM

Applicable to: All participants in the Power Source Disclosure Program

| . (print name)  |
|---|
| , (print name), title), declare under penalty of perjury, that the statements contained in this report including Schedules 1 and 2 are true and |
|   |
| correct and that I, as an authorized agent of (print name of company)   |
| , have authority to submit this report on the company's behalf. I further declare that the megawatt-hours claimed as specific                   |
|   |
| ourchases as shown in these Schedules were, to the best of my knowledge,  |
| sold once and only once to retail customers.  |
| Name:   |
| Representing (Retail Supplier):   |
| representing (retail supplier).   |
| Signature:  |
|   |
| Dated:  |
| Executed at:  |
|   |



### **Optional Worksheet for Multiple Product Filers**

#### Share Factor Worksheet for:

#### (Electric Service Product Name Here)

INSTRUCTIONS: This tool can be used when a utility offers a green product that is sourced by a mix of dedicated and non-dedicated generation sources (e.g., a 50% green electric service product). This Sample Schedule and the worksheet on the following tab enable a reporting entity to proportionally allocate non-dedicated resources, (i.e., all generation sources that are split between products rather than exclusively serving one) to multiple electric service products.

Sample values have been added to this sheet. In the example below, the generation from a hypothethical "Product 1" h as been calculated using the product share factors calculated on the Product Share Factor Worksheet. To find the amount of a resource's allocation to a specific electric service product, enter all non-dedicated resources used to serve multiple products, providing the total gross MWh procured in Column M. Non-dedicated means any generation that was not specifically procured to serve one product exclusively. Use the worksheet on the following tab to determine the Product Share Factor for the first product, and enter the factor into each line item in Column P. The values in Column Q are the MWh from e ach resource allocated to the product. Column R may be used to determine the portion of a resource's generation used to serve self-consumption (e.g., municipal street lighting). Fields in grey auto-populate.

#### To use this sample schedule and the worksheet on the following tab:

- 1. For each non-dedicated resource, input total gross MWh procured (across all products) in Column M.
- 2. Enter resales in Column N.
- 3. Enter the product share factor (calculated on the worksheet on the following tab ) in Column Q.
- 4. Enter the total self-consumed generation (e.g., municipal street lighting) in Cell R24. If this is zero or unknown, leave
- 5. To translate these results to Schedule 1 of the utility's annual Power Source report, copy the values in Column S of this sheet and paste them into Column O of Schedule 1 on the Annual Report for the relevant line items of nondedicated resources. Repeat this process for each electric service product that shares non-dedicated resources.
- Please include this calculation tool in the utility's Power Source filings for each electric service offering that utilizes it.

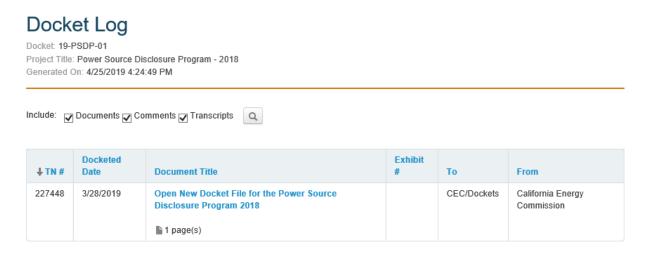
| ALL PROCUREMENTS (Specified and Unspecified) |      |           |                              |       |        |         |   |        |   |                  |  |          |   |
|--|------|-----------|------------------------------|-------|--------|---------|---|--------|---|------------------|--|----------|---|
|  | Unit |           | Locatio<br>B<br>(State<br>or |       |        | FERC QF | MVA Procured (across all electric service | MVL    | Procured After Resales (across all electric service | Product<br>Share | Share of<br>MWh<br>Procured<br>(before<br>self-<br>consumpti | Self-    | Product's<br>Share of<br>Net MWh<br>Procured<br>(after self-<br>consumpti |
| Facility Name                                | Mo.  | Fuel Type | e)                           | GU ID | EIA ID | ID all  | products                                  | Resold | products)   | Factor           | on)  | Consumed | on)   |
| Solar Plant                                  |      | ,,        |                              |       |        |         | 25,000                                    |        | 25,000  | 0.983            | 24,575   |          |   |
| Natural Gas Plant                            |      |           |                              |       |        |         | 40,000                                    |        | 40,000  | 0.983            | 39,320   | 580      | 38,740  |
| CAISO Spot Market                            |      |           |                              |       |        |         | 40,000                                    | 10,000 | 30,000  | 0.983            | 29,490   | 435      | 29,055  |
|  |      |           |                              |       |        |         |   |        |   |                  | -  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  | -  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  |  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  |  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  |  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  |  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  | -  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  |  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  | -  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  | -  | -        | -   |
|  |      |           |                              |       |        |         |   |        |   |                  | -  | -        | -   |

Total Self-Consumed Generation for this



### **Report Submittal**

- Submit PSD Annual Report to: PSDprogram@energy.ca.gov
- Energy Commission Staff will Review and Post Each Annual Report in Excel format to the 19-PSDP-01 docket
- Confidentiality Requests May Be Submitted Through E-Filing





### **PSD Schedule and Deadlines**

- Annual Report
  - Due on or before June 1<sup>st</sup> of each year.
    - For 2018 Reports, staff will accept Annual Reports on or before June 3, 2019, as June 1<sup>st</sup> occurs on a Saturday
  - Retail suppliers shall report information on purchases made during the previous calendar year<sup>1</sup>

June 3, 2019



### **2018 Power Content Label**

| 2017 POWER CONTENT LABEL  |                |                 |  |  |  |  |  |  |  |  |  |  |
|---|----------------|-----------------|--|--|--|--|--|--|--|--|--|--|
| (Insert C   | ompany Name)   |                 |  |  |  |  |  |  |  |  |  |  |
| ENERGY RESOURCES Power Mix 2017 CA Power Mix**  |                |                 |  |  |  |  |  |  |  |  |  |  |
| Eligible Renewable  | 0%             | 29%             |  |  |  |  |  |  |  |  |  |  |
| Biomass & biowaste  | 0%             | 2%              |  |  |  |  |  |  |  |  |  |  |
| Geothermal  | 0%             | 4%              |  |  |  |  |  |  |  |  |  |  |
| Eligible hydroelectric  | 0%             | 3%              |  |  |  |  |  |  |  |  |  |  |
| Solar   | 0%             | 10%             |  |  |  |  |  |  |  |  |  |  |
| Wind  | 0%             | 10%             |  |  |  |  |  |  |  |  |  |  |
| Coal  | 0%             | 4%              |  |  |  |  |  |  |  |  |  |  |
| Large Hydroelectric   | 0%             | 15%             |  |  |  |  |  |  |  |  |  |  |
| Natural Gas   | 0%             | 34%             |  |  |  |  |  |  |  |  |  |  |
| Nuclear   | 0%             | 9%              |  |  |  |  |  |  |  |  |  |  |
| Other   | 0%             | <1%             |  |  |  |  |  |  |  |  |  |  |
| Unspecified sources of power*   | 0%             | 9%              |  |  |  |  |  |  |  |  |  |  |
| TOTAL   | 100%           | 100%            |  |  |  |  |  |  |  |  |  |  |
| "Unspecified sources of power" means electricity from transactions that are not traceable to specific generation sources.     ** Percentages are estimated annually by the California Energy Commission based on the electricity sold to California consumers during the identified year. |                |                 |  |  |  |  |  |  |  |  |  |  |
| For specific information about this   | (Compan        | y Name)         |  |  |  |  |  |  |  |  |  |  |
| electricity product, contact:   | (Company Pho   | one Number)     |  |  |  |  |  |  |  |  |  |  |
| For general information about the Power Content Label, please visit:  | http://www.ene | rgy.ca.gov/pcl/ |  |  |  |  |  |  |  |  |  |  |
| For additional questions, please contact the California Energy 844-454-2906   |                |                 |  |  |  |  |  |  |  |  |  |  |

Commission at:



### 2018 Power Content Label Guidance

- Power Content Label Template Posted With the Final 2018 California Total System Power Values
- Notification of Availability Will Be Provided
- Retail Suppliers Must Use the Power Content Label
   Template Provided by the Energy Commission
  - No text may be added to the template
  - The template may not be edited or formatted
  - Multiple Product Templates Will Be Available



### 2018 Power Content Label Deadlines

- Power Content Label
  - Due to Customers and the Energy Commission "on or before the end of the first complete billing cycle for the third quarter of the year"
  - Must be sent by US Mail or Electronic Mail if Customer has Consented
  - Annual disclosures shall also be displayed on the website of the retail supplier

<sup>1</sup>PSD Program Regulations, Section 1393(d)(3)



### 2018 Audit Guidance

- Audit Requirements
  - Agreed-Upon Procedures
    - Separate Audit for Each Electric Service Product
- Audit Alternative Requirements
  - Available to Public Agency Retail Suppliers for One Electric Service Product
  - Requires Board of Directors Approval of the Annual Report
  - Audit Must Be Submitted for Each Additional Product
- Due October 1 Each Year



### Thank You!

For more information:

Website: www.energy.ca.gov/PCL

Email: PSDProgram@energy.ca.gov

