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December 4, 2007

**Advice 2891-G/3169-E**

Pacific Gas and Electric Company (U 39-M)

Public Utilities Commission of the State of California

**Subject: Request for Authorization to Offer the Mover Service Program on a Non-Tariffed Basis and to Establish a Non-Tariffed Product and Services Balancing Account**

**Purpose**

Pacific Gas and Electric Company (PG&E) hereby requests authorization from the California Public Utilities Commission (Commission or CPUC) to offer a new non-tariffed product and service (NTP&S) category entitled "Mover Service." The program will enable customers that start or transfer their utility service with PG&E to elect to access a mover-service vendor that may be of interest to a customer in the midst of a move. In order to conveniently offer this service, PG&E requests a limited waiver of Affiliate Transaction Rule IV.A. PG&E also proposes to establish two new Non-Tariffed Products and Services Balancing Accounts – Electric (NTBA-E) and Gas (NTBA-G) – on its respective electric and gas Preliminary Statements to allow PG&E to track the customer share of net revenues of this Mover Service program for determining the annual positive net revenue disbursement to ratepayers.

**Background**

This filing is made pursuant to Rule VII.E of the Affiliate Transaction Rules, which requires energy utilities to submit an advice letter describing any new category of NTP&S it proposes to offer. This letter is in compliance with all requirements of Rule VII, and also asks for a limited waiver of Affiliate Transaction Rule IV.A, in order to offer this service.

### **Description of New Non-Tariffed Service**

PG&E proposes to offer a new NTP&S category entitled "Mover Service." This program will offer residential customers the option to access a mover-service vendor at the end of their transaction with PG&E when they require starting or transferring utility service. The third-party services offered by the mover-service vendor may include, but are not limited to, telephone, internet, cable or satellite television, home security, trash removal, and a host of other products and services that customers value when they move to a new location. PG&E believes the Mover-Service program will enhance customer service by providing PG&E residential customers an added convenience, a "one-stop" call for moving services. The program will also generate additional revenues to share with ratepayers at no additional cost to ratepayers, and will comply with all applicable CPUC rules and requirements.

Currently, most PG&E customers apply for new or transferred gas and electric service by calling PG&E's 1-800 number and being connected to a Call Center, while a small percentage visit PG&E local offices or use the PG&E website. Utilizing the Call Centers, PG&E will be able to offer customers a "one-stop" for valuable move-related services by providing them with the opportunity to be transferred to a mover-service vendor. PG&E will have a contractual agreement with the vendor that will provide flexibility and control over the quality of the vendor's customer service. The agreement will give PG&E the ability to reduce or terminate this program should it fail to meet PG&E's anticipated quality of service and other standards.

In order to separate tariffed utility service from the Mover Service, PG&E's Customer Service Representatives (CSRs) will follow specific procedures that clearly define when the customer will be transferred to a mover-service vendor for the Mover Service. PG&E's CSR will use a standard script to ensure the Mover Service program offer is delivered to customers in a uniform manner. If the customer indicates they are interested in the program, the CSR will transfer the call to the mover-service vendor. At this time, PG&E's service will end. However, if the customer indicates they are not interested in the Mover Service program, the CSR will courteously terminate the call. The script that will be used by PG&E's CSR will be designed, and modified as necessary, to ensure the following messages are conveyed to customers:

- Correct and consistent information is conveyed about the vendor's Mover Service
- Mover Service products and services are identified as managed by the vendor and not part of PG&E's gas and electric service
- Any hard sell connotations are eliminated
- Any language or statements that may be perceived as inappropriate are

eliminated

- Mover Service products or services are not endorsed by PG&E
- Only basic customer information, such as name, address, move date, and a unique customer identifier will be transferred to the mover-service vendor
- All other utility customer information will remain confidential

In addition, PG&E may offer this service to customers who use PG&E's website or visit PG&E's front offices to start or transfer service.

PG&E's existing utility service will not be adversely affected by implementation of this program. The Mover Service offer will be suspended during Level 4 emergencies<sup>1</sup> when CSR staff will be dedicated to support customer calls relating to the Level 4 emergency event. Furthermore, PG&E will regularly monitor its Call Center Operations service levels and resources to ensure that the Mover Service program will not adversely affect the utility service.

In order to avoid "hard sell" behavior, PG&E CSRs will not receive any incentives for sales levels achieved in this program. The CSRs' performance will continue to be objectively measured by the volume of work they handle and the degree of customer satisfaction they realize, while meeting work load standards. These measures will be considered in recognizing employees for their performance.

In Decision (D.) 99-04-021, the CPUC ordered the ratepayer share of NTP&S revenues to be applied by PG&E as an adjustment to authorized revenue requirements in PG&E's Transition Revenue Account (TRA). The TRA account no longer exists. In order to appropriately track the costs and revenues of the program, PG&E proposes to establish new Non-Tariffed Products and Services Balancing Accounts – Electric (NTBA-E) and Gas (NTBA-G) – on its respective electric and gas Preliminary Statements to allow PG&E to account for new non-tariffed products and services, such as the Mover Service program. The NTBAs for both electric and gas will track the customer share of net revenues from the Mover Service program for annual disbursement of positive balances by NTP&S category via the 50/50 sharing mechanism as approved in Application 98-05-007 by D.99-04-021. In the event that PG&E files for, and the Commission approves, other future new non-tariffed products and services, PG&E will maintain accounting records to track associated revenues and costs for each new non-tariffed product and service approved by the Commission on a category by

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<sup>1</sup> A level 4 emergency is one which impacts PG&E's and/or customer's ability to function normally and requires the full mobilization of PG&E resources to respond. Other factors could include an emergency requiring extensive cross-business unit prioritization of resources or which causes extensive inquiries from customers, the media, or government agencies.

category basis.

The cost accounting for the Mover Service will be consistent with D.99-04-021, issued on April 1, 1999. As provided in that decision, revenues, net of costs and income taxes<sup>2</sup>, will be split 50/50 between customers and shareholders. The costs associated with this program will include costs such as, but not limited to, telephone upgrades, IT material and labor costs to implement the service, contract implementation, CSR training and increased CSR call time to offer the Mover Service program, charged at the provider cost center standard rate where applicable.

All expenses and revenues will be charged to a unique order number created for the Mover Service program. The revenues, net of costs and taxes, will be split 50/50 between customers and shareholders. The amount shared with customers will be transferred to the Distribution Recovery Adjustment Mechanism (DRAM) and the Core Fixed Cost Account (CFCA) for a rate reduction through the Annual Electric True-Up and Annual Gas True-Up advice letters.

#### **Request for Limited Waiver of Affiliate Transaction Rule IV.A**

PG&E seeks a limited waiver of Affiliate Transaction Rule IV.A to permit verbal customer consent to transfer interested customers to the mover-service vendor. This request should be approved to permit PG&E to offer referral services in a way that is convenient to customers, minimizes call handle times, and maximizes customer satisfaction with the Mover Service program. The limited waiver requested here will allow PG&E to automatically transfer the customer from its call center to the mover-service vendor's customer service center along with the basic customer information.

Rule IV.A of the Affiliate Transaction Rules requires written customer consent for the release of *any* customer information to *any* third-party (affiliate or not). PG&E does *not* seek a broad revision to this policy. Obtaining advanced written customer consent to transfer basic customer information, however, would be unreasonably burdensome and hinder timely service and enhanced customer convenience. Therefore, PG&E requests that the Commission allow PG&E to provide basic customer information to the vendor upon verbal customer consent. If the Commission approves, PG&E will use the following guidelines in transferring data to the mover-service vendor:

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<sup>2</sup> PG&E will use a tax-adjusted sharing methodology when calculating the 50-50 split between shareholders and ratepayers.

- 1) Customer load/usage and billing information will never be provided to the mover-service vendor;
- 2) Only the minimum information required to fulfill the customer's referral will be provided to the vendor, including: name, address, move date and a unique customer identifier;
- 3) Information will be provided only to the mover-service vendor; and
- 4) Customer information will never be provided to the mover-service vendor if the customer declines interest in the Mover Service.

This limited waiver of Rule IV.A allows customers to verbally approve release of limited customer information and appropriately balances protection of customer confidentiality with customer service and convenience.

### **Compliance with Rule VII of the Affiliate Transaction Rules**

Rule VII of the Affiliate Transaction Rules sets forth the requirements for a utility to offer non-tariffed products and services. Rule VII.C.4 delineates the specific conditions that must be met to offer the product or service on a non-tariffed basis; Rule VII.D lists the general conditions to offer any new non-tariffed products and service; and Rule VII.E.1 details the specific requirements for advice letter filings required to obtain Commission approval to offer new categories of non-tariffed products and services.

Rule VII.C.4 sets forth the following conditions that must be met for an energy utility to offer a non-tariffed product or service:

1. The non-tariffed product or service utilizes a portion of a utility asset or capacity;
2. Such asset or capacity has been acquired for the purpose of and is necessary and useful in providing tariffed utility services;
3. The involved portion of such asset or capacity may be used to offer the product or service on a non-tariffed basis without adversely affecting the cost, quality or reliability of tariffed utility products and services;
4. The products and services can be marketed with minimal or no incremental ratepayer capital, minimal or no new forms of liability or business risk being incurred by utility ratepayers and no undue diversion of utility management attention; and
5. The utility's offering of such non-tariffed product or service does not violate any law, regulation, or Commission policy regarding anti-competitive practices.

PG&E's Mover Service program is in compliance with the requirements of Rule VII.C.4 because PG&E will use existing utility assets and employees to offer the Mover Service to participating customers. The existing utility assets associated with the Mover Service include the assets that were acquired for the purpose of tariffed utility service in order to provide safe, reliable, and efficient service. These assets include: Call Center Operations buildings and facilities, Customer Service Representatives, and Call Center equipment.

Utility assets and labor used to offer the Mover Service program will be primarily call center personnel, overhead, and equipment. The Mover Service will not affect the cost, quality, or reliability of tariffed utility products and services. In order to achieve this, as the workload increases, PG&E will add additional CSRs to handle the increased volume of work, the costs of which will be borne by the Mover Service program. In the event of a major emergency such as an earthquake, a powerful storm, or major power outage that requires a high level of emergency response, PG&E will suspend offering the Mover Service program so that all PG&E resources will be deployed to deal with the emergency. PG&E will suspend offering the Mover Service program during a Level 4 emergency.

PG&E's shareholders will be responsible for all risk associated with the Mover Service. PG&E will record the costs and revenues for this program in a unique order and track the customer share of net revenues in the NTBAs. This will ensure proper accounting procedures are met. Any costs that exceed revenues will be borne by PG&E's shareholders.

PG&E will offer the Mover Service program using existing PG&E facilities and personnel. The program will not unduly divert utility management attention from tariffed utility services. PG&E intends the implementation of the Mover Service program to result in a higher level of customer satisfaction because it provides customer convenience and saves time.

PG&E's Mover Service does not violate any laws, regulations, or Commission policies regarding anti-competitive practices. The relevant market for the program is the move-services market. PG&E and the selected mover-service vendor will not endorse any of the individual products or services offered by third-parties, and customers will have a choice to accept or decline PG&E's offer to be transferred to the mover-services vendor. Furthermore, the customer will have no obligation to subscribe to or purchase from the third-party vendor any of the products or services the mover-service vendor introduces or offers. Customers will make the final decision on selecting any move services or products.

PG&E's goal in providing this program is to create a positive customer experience and enhance customer service. PG&E will not charge any fee for this Mover Service. This program should provide PG&E's customer with added convenience

during their moves, by allowing them to order many of their moving needs in one call. The market for the actual services offered by the mover-service vendor should not be adversely affected because PG&E will require the vendor to allow any third-party service provider to participate as long as they meet a minimum criteria set for all service providers. The mover-service vendor will not set prices. PG&E will have no control over pricing. Thus, any prices to be paid will be agreed to by the customer for selected third-party services (e.g., telephone, internet, etc.).

PG&E will select a mover-service vendor for this program based on the skill and ability to provide a diverse selection of products and services and a proven track record establishing that the vendor can deliver positive customer experience and increased customer satisfaction.

Rule VII.D sets forth the following general conditions that must be met before a utility can offer any new non-tariffed products and services. A utility may offer new non-tariffed products and services only if the Commission has adopted and the utility has established:

1. A mechanism or accounting standard for allocating costs to each new product or service to prevent cross-subsidization between services a utility would continue to provide on a tariffed basis and those it would provide on a non-tariffed basis.
2. A reasonable mechanism for treatment of benefits and revenues derived from offering such products and services, except that in the event the Commission has already approved a performance-based ratemaking mechanism for the utility and the utility seeks a different sharing mechanism, the utility should petition to modify the performance-based ratemaking decision if it wishes to alter the sharing mechanism, or clearly justify why this procedure is inappropriate, rather than doing so by application or other vehicle.
3. Periodic reporting requirements regarding pertinent information related to non-tariffed products and services; and
4. Periodic auditing of the costs allocated to and the revenues derived from non-tariffed products and services.

PG&E will comply with Rule VII.D stated above. PG&E will establish specific orders to track the costs and revenues associated with the Mover Service program, and will track and record the customer share of net revenues in the NTBAs, as described above.

The revenues generated from the Mover Service program will be subject to PG&E's net revenue sharing mechanism, adopted in D.99-04-021. This mechanism will allocate net revenues from the Mover Service program on a 50/50 basis between ratepayers and shareholders. The net revenue will be subject to a tax adjusted sharing mechanism.

PG&E proposes to use the same reporting mechanism for the Mover Service program that is currently used for existing non-tariffed products and services in compliance with Rule VII.H. PG&E submitted its most recent (eleventh) Periodic Report on Non-Tariffed Products and Services on March 15, 2007. The next report will be submitted on March 15, 2008, and annually thereafter. In Rule VII.H, the Commission requires that PG&E's Periodic Report provide a brief description of the non-tariffed product and service categories it offers, costs allocated to and revenues derived from each category, and information on the proportion of relevant utility assets used to offer each category of product and service. Thus, the information in that periodic report will satisfy the Commission's requirement in Rule VII.E.

Furthermore, to ensure compliance with the requirements of Rule VII, PG&E will use its annual independent audit of compliance as required by Affiliate Transaction Rule VI.C, to review its non-tariffed product and service offerings, including the Mover Service program.

Prior to offering a new category of non-tariffed products and services, the Commission requires the utility to file an advice letter showing it meets the requirements set forth in Rule VII.E.1 as follows:

- a. Demonstrate compliance with these rules;
- b. Address the amount of utility assets dedicated to the non-utility venture, in order to ensure that a given product or service does not threaten the provision of utility service, and show that the new product or service will not result in a degradation of cost, quality, or reliability of tariffed goods and services;
- c. Address the potential impact of the new product or service on competition in the relevant market, including but not limited to the degree in which the relevant market is already competitive in nature and the degree to which the new category of products or services is projected to affect that market.
- d. Be served on the service list of Rulemaking 97-04-OII/Investigation 97-04-012, as well as on any other party appropriately designated by the rules governing the Commission's advice letter process.

PG&E's Mover Service program complies with all other applicable Affiliate Transaction Rules. None of PG&E's affiliates will participate as service providers for the Mover Service program.

No PG&E assets will be fully dedicated to the Mover Service program. As discussed above, the use of available capacity of existing utility assets will not adversely impact the costs, quality, or reliability of tariffed goods and services. To achieve this, when the volume of call transfers increase, PG&E will increase the number of CSRs and associated resources to be able to handle the volume of increased calls. The Mover Service will be suspended during a Level 4 emergency, so PG&E's available CSRs and assets can be used to respond to the emergency event.

PG&E will bear the risk of this program in order to provide better customer service to its customers. Consumers will benefit by saving time and obtaining needed services more conveniently. PG&E's ratepayers will benefit by improved utilization of the assets dedicated to ratepayer services and lower rates through revenue sharing.

### **Protests**

Anyone wishing to protest this filing may do so by sending a letter by December 24, 2007, which is **20** days from the date of this filing. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. Protests should be mailed to:

CPUC Energy Division  
Attention: Tariff Unit, 4<sup>th</sup> Floor  
505 Van Ness Avenue  
San Francisco, California 94102

Facsimile: (415) 703-2200  
E-mail: [mas@cpuc.ca.gov](mailto:mas@cpuc.ca.gov) and [jnj@cpuc.ca.gov](mailto:jnj@cpuc.ca.gov)

Copies should also be mailed to the attention of the Director, Energy Division, Room 4005 and Honesto Gatchalian, Energy Division, at the address shown above.

The protest also should be sent via U.S. mail (and by facsimile and electronically, if possible) to PG&E at the address shown below on the same date it is mailed or delivered to the Commission.

Pacific Gas and Electric Company  
Attention: Brian Cherry

Vice President, Regulatory Relations  
77 Beale Street, Mail Code B10C  
P.O. Box 770000  
San Francisco, California 94177

Facsimile: (415) 973-7226  
E-Mail: PGETariffs@pge.com

**Effective Date:**

PG&E requests that this advice filing be approved by Commission resolution as soon as possible.

**Notice:**

In accordance with General Order 96-B, Section IV, a copy of this advice letter excluding the confidential appendices is being sent electronically and via U.S. mail to parties shown on the attached list and the service list for Rulemaking 97-04-011/Investigation 97-04-012. Address changes should be directed to Rose De La Torre (415) 973-4716. Advice letter filings can also be accessed electronically at:

<http://www.pge.com/tariffs>



Brian K. Cherry  
Vice President - Regulatory Relations

cc: Service List for Rulemaking 97-04-011/Investigation 97-04-012  
Gurbux Kahlon, Energy Division  
Don Lafrenz, Energy Division  
Richard Myers, Energy Division

# CALIFORNIA PUBLIC UTILITIES COMMISSION

## ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No. **Pacific Gas and Electric Company (ID U39 M)**

Utility type:

ELC       GAS  
 PLC       HEAT       WATER

Contact Person: David Poster

Phone #: (415) 973-1082

E-mail : DXPU@pge.com

EXPLANATION OF UTILITY TYPE

ELC = Electric      GAS = Gas  
PLC = Pipeline      HEAT = Heat      WATER = Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: **2891-G/3169-E**

Tier: **[3]**

Subject of AL: Request for Authorization to Offer the Mover Service Program on a Non-Tariffed Basis and to Establish a Non-Tariffed Product and Services Balancing Account

Keywords (choose from CPUC listing): Non-Tariffed Products and Services

AL filing type:  Monthly  Quarterly  Annual  One-Time  Other \_\_\_\_\_

If AL filed in compliance with a Commission order, indicate relevant Decision/Resolution #:

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: No

Summarize differences between the AL and the prior withdrawn or rejected AL<sup>1</sup>: \_\_\_\_\_

Is AL requesting confidential treatment? If so, what information is the utility seeking confidential treatment for: No

Confidential information will be made available to those who have executed a nondisclosure agreement:  Yes  No

Resolution Required?  Yes  No

Requested effective date: **As soon as possible.**

No. of tariff sheets: 6

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: Creates two new balancing accounts – see Attachment 1

Service affected and changes proposed<sup>1</sup>: N/A

Pending advice letters that revise the same tariff sheets:

**Protests, dispositions, and all other correspondence regarding this AL are due no later than 20 days after the date of this filing, unless otherwise authorized by the Commission, and shall be sent to:**

**CPUC, Energy Division**

**Tariff Files, Room 4005**

**DMS Branch**

**505 Van Ness Ave.,**

**San Francisco, CA 94102**

**[jnj@cpuc.ca.gov](mailto:jnj@cpuc.ca.gov) and [mas@cpuc.ca.gov](mailto:mas@cpuc.ca.gov)**

**Pacific Gas and Electric Company**

**Attn: Brian K. Cherry**

**Vice President, Regulatory Relations**

**77 Beale Street, Mail Code B10C**

**P.O. Box 770000**

**San Francisco, CA 94177**

**E-mail: [PGETariffs@pge.com](mailto:PGETariffs@pge.com)**

**ATTACHMENT 1  
Advice 2891-G**

<b>Cal P.U.C. Sheet No.</b>	<b>Title of Sheet</b>	<b>Cancelling Cal P.U.C. Sheet No.</b>
26710-G	Preliminary Statement Part BT--Non-tariffed Products and Services Balancing Account	New
26711-G	Table of Contents -- Rate Schedules	26571-G
26712-G	Table of Contents -- Title Page	26558-G

**ATTACHMENT 1  
Advice 3169-E**

<b>Cal P.U.C. Sheet No.</b>	<b>Title of Sheet</b>	<b>Cancelling Cal P.U.C. Sheet No.</b>
26730-E	Preliminary Statement Part ET--Non-Tariffed Products and Services Balancing Account	New
26731-E	Table of Contents -- Rate Schedules	26685-E
26732-E	Table of Contents -- Title Page	26516-E



PRELIMINARY STATEMENT  
(Continued)

BT. NON-TARIFFED PRODUCTS AND SERVICES BALANCING ACCOUNT – GAS (NTBA-G) (N)

1. **PURPOSE:** The purpose of the Non-Tariffed Products and Services Balancing Account – Gas (NTBA-G) is to record the customer share of revenues net of costs and income taxes associated with new Non-Tariffed Products and Services (NTP&S) pursuant to Affiliate Transaction Rule VII.

Costs and revenues will be tracked for appropriate disbursement of revenues, net of expense, to customers and shareholders via the 50/50 sharing mechanism as approved in Application (A.)98-05-007 by Decision (D.)99-04-021.

The NTBA-G mechanism does not apply to NTP&S in PG&E's existing NTP&S catalogue, which remains subject to Other Operating Revenue treatment, consistent with D.99-04-021.

2. **APPLICABILITY:** The NTBA-G applies to all customer classes, except for those specifically excluded by the Commission.
3. **RATES:** The NTBA-G does not currently have a rate component.
4. **ACCOUNTING PROCEDURE:** PG&E shall maintain the NTBA-G by making entries at the end of each month as follows:

- a. An entry equal to the result of the following calculation:

- i. 45% of the gross new NTP&S revenues.
- ii. Less 45% of PG&E's new NTP&S costs including, but not limited to, contract implementation, telephone upgrades, IT costs, training, and labor time.
- iii. The difference between i. and ii. multiplied by a factor of 37.21% (a function of the portion allocated to customers and the statutory tax rates, subject to update), in order to provide customers with 50% of the after-tax net revenues.

If the result of the calculation is positive (i.e. revenues exceed expenses), the entry will be a credit; if the result is negative, the entry will be a debit.

- b. An entry equal to the interest on the average of the balance at the beginning of the month and the balance after the above entry at a rate equal to one-twelfth the interest rate on three-month Commercial paper for the previous month, as reported in the Federal Reserve Statistical Release, H.15 or its successor.
- c. A debit entry at the end of each year to transfer the balance from the NTBA-G to the CFCA (and included in the Annual Gas True-up filing), unless otherwise specified by the Commission, in order to properly credit customers with revenues pursuant to D.99-04-021. If the balance at the end of the year for any product or service category is a debit, no transfer will be made for that product or service category, and the balance for that product or service category will be reset to zero at the beginning of the year.

PG&E will maintain accounting records to track associated revenues and costs for each non-tariffed product or service approved by the Commission on a category by category basis.

(N)



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PRELIMINARY STATEMENT  
(Continued)

ET. NON-TARIFFED PRODUCTS AND SERVICES BALANCING ACCOUNT – ELECTRIC (NTBA-E) (N)

1. **PURPOSE:** The purpose of the Non-Tariffed Products and Services Balancing Account – Electric (NTBA-E) is to record the customer share of revenues net of costs and income taxes associated with new Non-Tariffed Products and Services (NTP&S) pursuant to Affiliate Transaction Rule VII.

Costs and revenues will be tracked for appropriate disbursement of revenues, net of expense, to customers and shareholders via the 50/50 sharing mechanism as approved in Application (A.)98-05-007 by Decision (D.) 99-04-021.

The NTBA-E mechanism does not apply to NTP&S in PG&E's existing NTP&S catalogue, which remains subject to Other Operating Revenue treatment, consistent with D.99-04-021.

2. **APPLICABILITY:** The NTBA-E applies to all customer classes, except for those specifically excluded by the Commission.
3. **RATES:** The NTBA-E does not currently have a rate component.
4. **ACCOUNTING PROCEDURE:** PG&E shall maintain the NTBA-E by making entries at the end of each month as follows:

- a. An entry equal to the result of the following calculation:

- i. 55% of the gross new NTP&S revenues.
- ii. Less 55% of PG&E's new NTP&S costs including, but not limited to, contract implementation, telephone upgrades, IT costs, training, and labor time.
- iii. The difference between i. and ii. multiplied by a factor of 37.21% (a function of the portion allocated to customers and the statutory tax rates, subject to update), in order to provide customers with 50% of the after-tax net revenues.

If the result of the calculation is positive (i.e., revenues exceed expenses), the entry will be a credit; if the result is negative, the entry will be a debit.

- b. An entry equal to the interest on the average of the balance at the beginning of the month and the balance after the above entry at a rate equal to one-twelfth the interest rate on three-month Commercial paper for the previous month, as reported in the Federal Reserve Statistical Release, H.15 or its successor.
- c. A debit entry at the end of each year to transfer the balance from the NTBA-E to the DRAM (and included in the Annual Electric True-up filing), unless otherwise specified by the Commission, in order to properly credit customers with revenues pursuant to D.99-04-021. If the balance at the end of the year for any product or service category is a debit, no transfer will be made for that product or service category, and the balance for that product or service category will be reset to zero at the beginning of the year.

PG&E will maintain accounting records to track associated revenues and costs for each non-tariffed product or service approved by the Commission on a category by category basis.

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ABAG Power Pool	Douglass & Liddell	PG&E National Energy Group
Accent Energy	Downey, Brand, Seymour & Rohwer	Pinnacle CNG Company
Aglet Consumer Alliance	Duke Energy	PITCO
Agnews Developmental Center	Duke Energy North America	Plurimi, Inc.
Ahmed, Ali	Duncan, Virgil E.	PPL EnergyPlus, LLC
Alcantar & Kahl	Dutcher, John	Praxair, Inc.
Ancillary Services Coalition	Dynergy Inc.	Price, Roy
Anderson Donovan & Poole P.C.	Ellison Schneider	Product Development Dept
Applied Power Technologies	Energy Law Group LLP	R. M. Hairston & Company
APS Energy Services Co Inc	Energy Management Services, LLC	R. W. Beck & Associates
Arter & Hadden LLP	Exelon Energy Ohio, Inc	Recon Research
Avista Corp	Exeter Associates	Regional Cogeneration Service
Barkovich & Yap, Inc.	Foster Farms	RMC Lonestar
BART	Foster, Wheeler, Martinez	Sacramento Municipal Utility District
Bartle Wells Associates	Franciscan Mobilehome	SCD Energy Solutions
Blue Ridge Gas	Future Resources Associates, Inc	Seattle City Light
Bohannon Development Co	G. A. Krause & Assoc	Sempra
BP Energy Company	Gas Transmission Northwest Corporation	Sempra Energy
Braun & Associates	GLJ Energy Publications	Sequoia Union HS Dist
C & H Sugar Co.	Goodin, MacBride, Squeri, Schlotz &	SESCO
CA Bldg Industry Association	Hanna & Morton	Sierra Pacific Power Company
CA Cotton Ginners & Growers Assoc.	Heeg, Peggy A.	Silicon Valley Power
CA League of Food Processors	Hitachi Global Storage Technologies	Smurfit Stone Container Corp
CA Water Service Group	Hogan Manufacturing, Inc	Southern California Edison
California Energy Commission	House, Lon	SPURR
California Farm Bureau Federation	Imperial Irrigation District	St. Paul Assoc
California Gas Acquisition Svcs	Integrated Utility Consulting Group	Sutherland, Asbill & Brennan
California ISO	International Power Technology	Tabors Caramanis & Associates
Calpine	Interstate Gas Services, Inc.	Tecogen, Inc
Calpine Corp	IUCG/Sunshine Design LLC	TFS Energy
Calpine Gilroy Cogen	J. R. Wood, Inc	Transcanada
Cambridge Energy Research Assoc	JTM, Inc	Turlock Irrigation District
Cameron McKenna	Luce, Forward, Hamilton & Scripps	U S Borax, Inc
Cardinal Cogen	Manatt, Phelps & Phillips	United Cogen Inc.
Cellnet Data Systems	Marcus, David	URM Groups
Chevron Texaco	Matthew V. Brady & Associates	Utility Resource Network
Chevron USA Production Co.	Maynor, Donald H.	Wellhead Electric Company
City of Glendale	MBMC, Inc.	White & Case
City of Healdsburg	McKenzie & Assoc	WMA
City of Palo Alto	McKenzie & Associates	
City of Redding	Meek, Daniel W.	
CLECA Law Office	Mirant California, LLC	
Commerce Energy	Modesto Irrigation Dist	
Constellation New Energy	Morrison & Foerster	
CPUC	Morse Richard Weisenmiller & Assoc.	
Cross Border Inc	Navigant Consulting	
Crossborder Inc	New United Motor Mfg, Inc	
CSC Energy Services	Norris & Wong Associates	
Davis, Wright, Tremaine LLP	North Coast Solar Resources	
Defense Fuel Support Center	Northern California Power Agency	
Department of the Army	Office of Energy Assessments	
Department of Water & Power City	OnGrid Solar	
DGS Natural Gas Services	Palo Alto Muni Utilities	