

PUBLIC UTILITIES COMMISSION

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July 31, 2018

**Advice Letter 5257-E/5257-E-A**

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**SUBJECT: Revised Format of Energy Statement (Form 01-6630) for Net Energy  
Metered Customers**

Dear Mr. Jacobson:

Advice Letter 5257-E and supplemental 5257-E-A are effective as of April 25, 2018.

Sincerely,

A handwritten signature in dark ink, appearing to read "Edward Randolph".

Edward Randolph  
Director, Energy Division

March 26, 2018

**Advice 5257-E**

(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

**Subject: Revised Format of Energy Statement (Form 01-6630) for Net  
Energy Metered Customers**

Pacific Gas and Electric Company (PG&E) hereby submits for approval revisions to PG&E's customer energy statement (Energy Statement), as currently represented in Electric Sample Form 01-6630. The revisions in this advice submittal pertain to the formats received by customers taking service under a Net Energy Metering (NEM) tariff.<sup>1</sup> PG&E proposes to revise the NEM Energy Statement in response to regulatory directives and to improve customer understanding of NEM billing.

**1. Purpose**

PG&E submits this Tier 2 advice letter for approval of its revised Energy Statement per Electric Form No. 01-6630 in accordance with California Public Utilities Commission (CPUC or Commission) Ordering Paragraph (OP) 10 of Decision (D.) 07-07-047. The

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<sup>1</sup> This includes customers taking service under the NEM tariff codified in Section 2827 of the Public Utilities Code, and under the NEM Successor Tariff instituted per D.16-01-044 (Jan 28, 2016).

proposed changes further enhance PG&E's response to OP 8 in Resolution E-4792 that adopts PG&E's Net Energy Metering (NEM) Successor Tariffs as directed by D.16-01-044. PG&E is also proposing to make cosmetic changes that will enhance customer understanding and improve customer satisfaction with the NEM billing experience. The revisions proposed in this submittal are applicable to Energy Statements received by residential and small to medium non-residential customers.<sup>2</sup>

## **2. Background**

PG&E's gas and electric energy statements are based on standardized forms used to inform customers about the billed amount owed for services provided by PG&E, as well as by third-party energy providers (e.g. Community Choice Aggregators), when applicable. The information provided on PG&E's Energy Statements complies with Public Utilities Code (PUC Code) § 394.4(e), which requires that all bills have a standard format as determined by the Commission, along with all other pertinent legislative and Commission directives.

PG&E embarked on a substantial effort to redesign and simplify the information on customer energy statements for electric and natural gas service in 2006. In June of that year, PG&E filed Application A.06-06-026 to simplify the rate components and other information that were required to be displayed on the Energy Statement. Decision D.07-07-047 (July 26, 2007) approved PG&E's application with modification. Among other things, OP 9 of D.07-07-047 stipulated the items that must be included on all bills and OP 10 outlined the process by which PG&E must file an advice letter to make further changes to the Energy Statement.

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<sup>2</sup> Revisions are specific to the bill format and do not include updates to PG&E notices.

The NEM tariffs<sup>3</sup> — which serve customers that use solar or other technologies to generate electricity on-site — necessitate NEM-specific strategies for communicating billing charges on the Energy Statement. This submittal summarizes changes that have been made to PG&E's NEM Energy Statement since 2012,<sup>4</sup> as well as additional proposed changes that PG&E seeks to implement.

The proposed revised NEM Energy Statement formats (variations of Electric Sample Form No. 01-6630) address the following key areas for improvement, which are detailed in Section 8 of this submittal:

1. Increase awareness of the annual True-Up and how it is calculated
2. Use more customer-friendly language and define terms
3. Ensure the most relevant information is prioritized and located appropriately
4. Distinguish between PG&E and CCA NEM charges on CCA customer bills
5. Display positive net usage that determines Non-Bypassable Charges

### **3. NEM Customer Billing Overview**

The number of customers that have installed on-site renewable distributed generation (primarily solar PV) in PG&E's service area has grown considerably in the last several years. These customers — who number about 340,000 as of the end of 2017 — generally take service under a Net Energy Metering (NEM) tariff. Under a NEM tariff, customers receive credits for electricity exported to PG&E's grid that are used to offset electricity costs incurred when a customer imports electricity from the grid.

When participating in NEM, residential customers are billed for minimum delivery charges monthly, but are not required to pay for their total net electricity usage charges until the end of their 12 monthly billing cycles. PG&E terms this settlement of charges and credits

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<sup>3</sup> Including NEM and NEM2 (NEM Successor Tariff)

<sup>4</sup> PG&E last submitted forms for the Energy Statement in 2012, per Advice 3304-G/4052-E - *Revised Energy Statement (RCES) Formats in Compliance with Decision 12-03-015*.

at the end of this period a customer's "True-Up". In the case of customers who take service from a Community Choice Aggregator (CCA), PG&E's charges are handled the same way. However, CCA customers may be billed for the generation portion of their bill on a different schedule depending on their CCA's NEM program.

Each month, the NEM Energy Statement provides a summary of credits and charges netted over the course of that monthly billing cycle as well as information about the current year-to-date balance of charges that would potentially be due at True-Up. At the end of the 12-monthly billing cycles — the "True-Up period" or "relevant period"<sup>5</sup> — customers' cumulative net electricity charges and credits over the course of the entire relevant period are "trued-up" and any amount due or owed to the customer is billed or credited in the True-Up NEM Energy Statement.

The annual<sup>6</sup> True-Up period allowed under NEM enables customers to apply credits accrued when solar generation is higher than electricity usage (when the customer is a net exporter to the grid) to offset electricity charges when solar generation is lower than electricity usage (when the customer is a net importer of electricity). The seasonal variability of solar generation and usage means that customers may be net importers of electricity in some months and exporters in others.

#### **4. Helping NEM Customers Understand Billing**

Given the complexity of the NEM tariff, customers benefit from NEM-specific communications. Due to limited space for education on the Energy Statement, PG&E has used multiple communication channels to help NEM customers understand their net usage, charges, credits, and be aware of — and prepared for — their annual True-Up bills.

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<sup>5</sup> As defined in special conditions 2.g of PG&E's NEM Tariff and 2.h of PG&E's NEM2 tariff.

<sup>6</sup> While the True-Up period typically consists of 12 monthly billing cycles, or approximately a year, customers may be trued-up before 12 billing cycles due to changes in customers' service.

New NEM customers receive a Welcome Kit from PG&E that details how NEM works, provides information on what to expect from their monthly and annual billing, and includes Energy Statement examples. Then, in a customer's first year on the NEM tariff, he or she receives several communications from PG&E to help the customer understand the NEM Energy Statement.

PG&E also provides NEM/solar-specific web pages that walk customers through the NEM billing experience and provide detailed examples of how to read a NEM Energy Statement. When customers log in to their PG&E online account, they can view customized usage and electric charge information. In addition, expert representatives at PG&E's Solar Customer Service Center are available to help customers understand rates, NEM charges and credits, and bill calculations as well as other solar and NEM-related subjects.

## **5. Historical Changes to the NEM Energy Statement**

Since the last PG&E Energy Statement was filed in 2012, PG&E has implemented changes to its NEM Energy Statement to comply with regulatory directives and to improve customer understanding. The most significant of these changes occurred in 2014, when PG&E incorporated additional usage and billing information into the NEM Energy Statement. Previously, customers received a "minimum format" Energy Statement (Format #14 in A.06-06-026), and a separate Detail of Bill. In 2014, the information in the Detail of Bill was consolidated into the Energy Statement for residential and small-medium non-residential customers. The current NEM Energy Statement includes all elements required by OP 9 of D.07-07-047.<sup>7</sup>

Additionally, PG&E made minor adjustments to the NEM Energy Statement to reflect changes introduced by the NEM Successor Tariff Decision D.16-01-044 in 2016. This

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<sup>7</sup> To make room for a "NEM Account Summary" on page 1 of the NEM Customer Energy Statement, the "average daily usage" element was moved to a later page.

existing NEM Energy Statement will be called the “current” PG&E NEM Energy Statement for the purposes of this advice submittal.

Illustrative examples of the current PG&E NEM Energy Statement are shown in Attachments B and C. Attachment B shows an example of a NEM Energy Statement that NEM customers receive monthly until their annual True-Up. Attachment C shows an example of a NEM Energy Statement that NEM customers receive at the time of their annual True-Up. The differences between the monthly statement and the True-Up Statement consist primarily of variations in verbiage; the formats are the same.

Attachment A shows an illustrative example of a non-NEM Energy Statement for comparison to the NEM Energy Statement. The NEM Energy Statement has additional information on what are typically pages 3 and 4, which show details of monthly and cumulative NEM and delivery charges.

Table 1 describes features that are specific to NEM customers on the current NEM Energy Statement. In this table, specific features will be identified below with an alphanumeric identification (ID) marked with a “C” for “current” and an associated number for the feature identified that will match a label on the Energy Statement in attachments B and C. Please note, a summarized table of proposed changes will appear in the relevant attachments for easier reference when reviewing the illustrative Energy Statements.

The current NEM Energy Statement provides a number of features designed specifically for NEM customers. These include:

**Table 1. Historical Changes to NEM Energy Statement 2013-2017**

<b>Attachment(s) Page</b>	<b>Feature ID</b>	<b>Feature Description</b>	<b>Benefit</b>
B, C 1	<b>C1</b>	Your Net Energy Metering (NEM) Account Summary	Enable customers to track the total year-to-date charges they have accumulated. These are their current cumulative charges that will be/are due at "True-Up."
B, C 3	<b>C2</b>	Summary of NEM Charges	Provides customers a month-over-month and cumulative view of their NEM charges.
B, C 3	<b>C3</b>	Electric Charges Table	Helps customers track minimum delivery charges, which is what NEM customers pay on a monthly basis. Table also tracks Energy Charges that may be relevant for determining the True-Up amount.
B, C 3	<b>C4</b>	Explanation of Calculations	Helps customers understand what the specific charges are for and how True-Up will be calculated.
B, C 3	<b>C5</b>	Year-to-Date NEM Charges/Total NEM Charges Due Summary Box	Shows how charges are calculated at True-Up and helps customers track year-to-date NEM charges.
B, C 4	<b>C6</b>	NEM Charges before Taxes Graph	Provides a visual representation of NEM charges month over month.
B, C 4	<b>C7</b>	Cumulative NEM Balance by Month Graph	Provides a visual representation of cumulative charges to help customers track how they are trending toward True-Up.
C 5	<b>C8</b>	NEM True-Up Charges	Provides a summary of annual NEM charges.
B, C 6	<b>C9</b>	Details of NEM Charges	Provides details on charges for the monthly billing period. This information is equivalent to the Details of Electric



Attachment(s) Page	Feature ID	Feature Description	Benefit
			Charges on a non-NEM Energy Statement (typically on page 3).
B, C 6	<b>C10</b>	Average daily usage table	Required per CPUC D.07-07-047 OP 9. This information was moved from page 1 to the Detail of NEM Charges, to make room for the NEM Account Summary. This table is analogous to the Daily Usage Comparison information that appears on page 1 for a non-NEM Customer.

## 6. Determining Customer Needs and Preferences

In 2017, PG&E began an initiative to redesign NEM Energy Statements to better communicate how Non-Bypassable Charges<sup>8</sup> (NBCs) are calculated and how they factor into True-Up. Simultaneously, PG&E sought to make additional cosmetic changes to the NEM Energy Statement to address customers' challenges in understanding their NEM charges and True-Up. PG&E believes that increasing the clarity around True-Up and billing calculations will have a positive impact on customer satisfaction. This section

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<sup>8</sup> The NEM Successor Tariff D.16-01-044 (January 28, 2016) changed the NEM tariff to require customers to pay Non-Bypassable Charges on electricity consumed from the grid. This has required that PG&E provide additional detail in the NEM customer bill on the amount of electricity consumed from the grid and NBC charges associated with that usage. Ordering paragraph 8 in Resolution E-4792 (June 23, 2016), requires that the IOUs represent on customer bills the calculation method for determining Non-Bypassable Charges (NBCs) – based on the customers positive net hourly consumption. The methodology proposed by PG&E to address the NBC charges referenced in Res. E-4792 is described in PG&E Advice 4802-E-A (May 16, 2016), in which PG&E states "PG&E would also like to affirm its commitment to work toward... incorporating a line item on customers' bills showing their NBC charges".

summarizes how PG&E identified customer needs and appropriate design strategies for the NEM Energy Statement revision.

PG&E performed considerable research to better understand NEM customer needs around their billing statements. The research strategies included:

- Benchmarking billing best practices with other utilities
- Conducting focus groups with PG&E's solar call center representatives
- Performing in-depth interviews with existing PG&E NEM customers regarding the existing and proposed Energy Statement
- Conducting a quantitative study with customers to assess optimal bill redesign

#### **6.1. Benchmarking billing best practices with other utilities**

PG&E benchmarked best practices to bills used by California IOUs, SMUD, and other utilities. PG&E also benchmarked to a ComEd bill, the design of which was crowdsourced in 2014. Through this benchmarking, PG&E determined the types of images and approaches that best highlight essential bill information for customers. An important finding was that using graphic methods to convey key bill information is considered a best practice.

#### **6.2. Focus groups with PG&E's call center representatives**

PG&E held multiple meetings and focus groups with representatives from PG&E's Solar Customer Service Center. The call center representatives are PG&E employees who devote a majority of their time to helping NEM customers understand their bills. In the focus group, the representatives reviewed the current NEM Energy Statement as well as bills used for benchmarking. The representatives' experiences were leveraged to identify common customer questions, an optimal bill layout, and what visual representations of data would best serve customers.

Key findings of focus groups:

- Customers have trouble tracking where they are in the True-Up process and understanding what determines the amount due at their annual True-Up.
- Customers need better explanation of what is due monthly versus annually, including the monthly minimum delivery charges and year-to-date NEM credits and charges.
- Explaining how the True-Up amount is determined was made more challenging by the introduction of new factors under the NEM Successor Tariff (NEM 2.0), including Non-Bypassable Charges, as well as rate changes that could determine the amount owed at True-Up.

After meeting with call center representatives on new designs and layout, PG&E worked internally to understand the capabilities and constraints of the current billing system and tariff requirements. PG&E then used the learnings from benchmarking and the call center focus groups to create a revised NEM Energy Statement design that would increase customer understanding.

### **6.3. In-depth testing with existing customers**

PG&E performed two rounds of customer testing in the bill redesign process. The first round of customer testing solicited in-depth customer feedback on elements of the revised NEM Energy Statement. The second round of testing was done after feedback from the first round was incorporated, and quantitatively assessed the extent to which the redesign resulted in increased customer understanding and satisfaction.

In the first round of testing, PG&E contracted with a product testing firm to conduct research that would identify the features of the revised NEM Energy Statement that worked well and those that needed further improvement. The firm performed in-depth interviews with existing PG&E NEM customers to gain insight on the effectiveness of various features, assess verbiage and layout, and identify the features that were most important to helping customers understand NEM billing information.

The following were substantive findings:

- Customer-friendly language is preferred
- The term “Solar” is understood better than “Net Energy Metering” or “NEM”
- Definition of key terms is helpful
- More visually appealing elements facilitate better customer understanding and draw attention to key pieces of information
- Simple equations help customers understand the true-up calculation

Customers also provided specific comments regarding the layout of key information. PG&E then integrated the learnings into the revised bill design used for the quantitative customer testing.

For the second round of testing, PG&E engaged an outside vendor to conduct testing with existing PG&E NEM customers to compare the current versus the revised NEM Energy Statement. This testing was designed to quantitatively assess the impact of the revised bill on customers’ ease of finding and understanding key information, visual appeal, and how likely customers would be to call PG&E. A sample of 2,618 PG&E solar NEM customers evaluated bills through an online survey.<sup>9</sup>

The results of the research indicated that the revised NEM Energy Statement with visual features on page 1 showed statistically significant improvements across the board, including enhanced visual appeal, ability to find and understand key information such as estimated True-Up amount due (typically on page 1), and ease of understanding True-Up information (typically on page 3 of the Energy Statement).

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<sup>9</sup> Customers were randomly assigned to view one of six bills – the current bill (monthly and true-up), the revised monthly bill (either with or without graphic features on page 1), and the revised True-Up bill (either with or without graphic features on page 1).

Based on findings and recommendations from this research, PG&E updated the design and created a revised NEM Energy Statement that was then presented to external stakeholders for feedback.

## **7. Stakeholder Feedback**

PG&E solicited feedback from key stakeholders on the revised NEM Energy Statement, including those stakeholders identified in OP 11 of D.07-07-047. PG&E received feedback from Community Choice Aggregators (CCAs) on the revised NEM Energy Statement at a forum held at PG&E's Pacific Energy Center in San Francisco on August 29, 2017 titled "PG&E Bill Update Meeting: Vendors, CCAs and Utility". The revised bill was also shared with CCAs at their monthly CCA Billing meeting on October 16, 2017.

PG&E then invited key stakeholders to a workshop held on December 4, 2017 at the Pacific Energy Center. Invitees to the December 4, 2017 workshop included representatives from:

- The CCAs who serve customers in PG&E's service area
- Solar vendors and installers
- CPUC's Energy Division
- CPUC's Office of Ratepayer Advocates (ORA)
- The Utility Reform Network (TURN)
- The Center for Accessible Technologies (C for AT)<sup>10</sup>

Representatives from CCAs, solar vendors and installers, and ORA attended the workshop, either in person or remotely. At the workshop, PG&E presented the research process used to determine customer needs and preferences around NEM billing, how the scope of the project was determined, and results of customer testing of the revised NEM Energy Statement. Examples of the revised NEM Energy Statement were presented in

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<sup>10</sup> The Center for Accessible Technologies replaced the Disability Rights Advocates in reviewing the Energy Statement.

detail for both a full-service and CCA customer, and compared to the current NEM Energy Statement.

PG&E also followed up with CPUC ED staff, TURN and C for AT — who were unable to attend the workshop — and received written and in-person feedback from these stakeholders.

### **7.1. Stakeholder Insights**

Stakeholders provided many helpful suggestions for how PG&E could further improve the NEM Energy Statement. These suggestions included:

#### **Better tailor bill for NEM CCA Customers:**

- A. Delineate more clearly between PG&E NEM charges versus customers' applicable CCA charges.
- B. Better identify that the schedule of payment to the CCA under the CCA's NEM program may differ from the schedule for PG&E's NEM charges.
- C. Develop separate materials, potentially online, for CCA stakeholders to help them explain bill calculations and the potential types of True-Ups.

#### **Address how NEM charges may vary over the True-Up period:**

- D. Clarify that the True-Up charges displayed monthly are only year-to-date, and that the final amount may be considerably different due to the seasonality of solar generation and usage.

#### **Further refine explanations of calculations and definition of terms:**

- E. Clarify the NBC adjustment, as that calculation is confusing for customers.
- F. Provide more detailed on-line resources for more technically advanced customers to walk them through how the bill is calculated, and have a 'NEM Billing Glossary' to further explain complex terms such as Minimum Grid Supply Charges and Non-Bypassable Charges (NBCs).

**Drive consistency around TOU messaging:**

- G. Provide more education to customers about saving money by using electricity in off-peak hours; consider mirroring messaging that is being used on the Energy Upgrade California website.

**Provide payment flexibility:**

- H. Enable customers to pre-pay towards their True-Up.

**7.2. Consideration of Stakeholder Feedback**

PG&E very much appreciates the valuable feedback received from multiple stakeholders, and incorporated most stakeholder suggestions mentioned above. Some of the recommendations will be addressed through other mechanisms outside of this advice submittal:

- For the above Items “C”, “F”, and “G” — related to providing further education and detailed explanations of terms and calculations — PG&E added as much information as is reasonable given space constraints on the Energy Statement. PG&E is planning to develop additional on-line resources to further educate NEM customers. PG&E will review our existing educational resources and make changes and additions as appropriate based on stakeholder feedback.
- For item “H” — the suggestion to allow customers to pay their NEM charges ahead of their annual True-Up — PG&E understands the rationale for this option, that it could lessen the chance that customers receive a large bill at True-Up. However, due to seasonal variability and the customer-specific nature of both solar PV system generation and customer usage, it is difficult to provide reasonable guidance for how much each customer should pay toward their True-Up while ensuring that the customer doesn’t overpay. PG&E will carefully consider how this option would affect NEM customers and develop appropriate strategies to help customers manage their True-Up balance going forward.

The revised NEM Energy Statement is referred to hereafter in this submittal as the “proposed” NEM Energy Statement, and reflects incorporation of stakeholder feedback.

## **8. Proposed NEM Energy Statement**

PG&E requests approval of the NEM Energy Statement formats shown in Attachments D–F. These formats adhere to the requirements in D.07-07-047, and are designed to enhance customer understanding and improve customer satisfaction with the NEM billing experience. PG&E’s NEM Energy Statement redesign will be funded through PG&E’s 2017 General Rate Case for implementation through the end of year 2019.

### **8.1. Purposeful Layout Helps with Clarity: Focus listed by Page**

PG&E organized the proposed Energy Statement layout to present key areas of information on each page. Research indicates that customers spend the most time on pages 1 and 3 of the NEM Energy Statement. With this in mind, PG&E organized the information on each page<sup>11</sup> of the proposed NEM Energy Statement to increase customer understanding:

**Page 1:** This page is designed to help customers track the Total Amount Due for that monthly billing period and ensure that customers are aware of their year-to-date solar True-Up charges so they are prepared for True-Up.

**Page 2:** This page consists of Legal Definitions.

**Page 3:** This page is focused on helping customers understand the calculation that determines the True-Up amount and how it differs from what the customer pays monthly.

**Page 4:** This page is designed to help customers understand their energy usage and how this usage relates to Solar Net Usage Charges.

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<sup>11</sup> Please note that the length of the Energy Statement, and therefore page numbers, vary by customer. The page numbering used here represent a typical NEM Energy Statement.



**Page 5:** The focus of this page is on customer understanding of Minimum Charges.

**Page 6:** The focus of this page is on Solar Net Charges for the current monthly billing period as well as on Non-Bypassable Charges (“State Mandated Charges”).

**Page 7 and 8:** These pages display CCA charges and credits and appear for CCA customer bills only – no changes were made to these pages.

## **8.2. Proposed Improvements to the NEM Energy Statement**

The proposed revised NEM Energy Statement formats set out to address the following key areas for improvement:

1. Increase awareness of the annual True-Up and how it is calculated
2. Use more customer-friendly language and define terms
3. Ensure the most relevant information is prioritized and located appropriately
4. Distinguish between PG&E and CCA NEM charges on CCA customer bills
5. Display positive net usage that determines Non-Bypassable Charges

This section reviews changes proposed by PG&E to improve the NEM Energy Statement by key area of improvement and refers to Energy Statement format examples shown in attachments to this submittal. Attachments D, E and F show the *proposed* Energy Statement format for NEM customers. Attachment D shows an illustrative proposed *monthly* NEM Energy Statement format for full-service bundled customers. Attachment E represents a proposed *True-Up* NEM Energy Statement format for full-service bundled customers. Attachment F shows a proposed monthly NEM Energy Statement format for Community Choice Aggregation (CCA) customers.<sup>12</sup>

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<sup>12</sup> Please note that the font size and spaces between lines and tables shown in these attached mockups may differ slightly from the Energy Statement that customers receive.

The following tables identify key features by area of improvement that will be changed from the current NEM Energy Statements (represented in Attachments B and C), and the anticipated benefits of the changes.<sup>13</sup> Specific features will be identified below with a feature ID shown with a “P” for “proposed” and an associated number that will match a label on the Energy Statement format shown in attachments D and E.<sup>14</sup> Please note, a summarized table of proposed changes will appear in the relevant attachments for easier reference when reviewing the illustrative Energy Statements.

**Key area of improvement: Increase understanding of the annual True-Up**

To improve customers’ awareness of True-Up — including their ability to track progress toward True-Up, estimated True-Up date, and how True-Up is calculated — PG&E proposes the following design changes to the NEM Energy Statement:

**Table 2. Proposed changes to increase awareness and understanding of True-Up**

Attachment – Page	Feature ID(s)	Feature Name	Proposed Change	Benefit	Notes
D 1	P1	Solar True-Up Tracking box (monthly bill)	Add graphic feature for visual appeal and increase font size to draw attention to year-to-date Solar True-Up charges and True-Up date.	Increases awareness that True-Up will be due once annually and improves ability to track year-to-date charges and when True-Up will be due to avoid a surprise True-Up charge.	Cosmetic improvement.  Information ties across the bill: The “Estimated Year-to-Date Amount” shown on page 1 matches page 3 “Year-to-Date Solar Charges at True-Up”.

<sup>13</sup> These tables delineate substantive changes and do not highlight all text changes.

<sup>14</sup> Color shown is for illustrative purposes. PG&E is working on the ability to print in color.

<b>Attachment – Page</b>	<b>Feature ID(s)</b>	<b>Feature Name</b>	<b>Proposed Change</b>	<b>Benefit</b>	<b>Notes</b>
E 1	P2	Total Solar True-Up Charge Details box (True-Up Bill)	Add graphic feature for visual appeal and increase font size to draw attention to final Solar True-Up Charges.	Increases awareness that this is the True-Up statement and of the final True-Up amount due. Shows the calculation that determines the Total Solar True-Up Charges.	Cosmetic improvement.  Information ties across the bill: The calculation of “Total Solar True-Up Charge Details” shown on page 1 corresponds to the calculation in the page 3 “Solar True-Up” box.
D, E 3	P3 P4	True-up equation (P3) tied to table columns (P4)	Add column labels to the table so that columns that determine True-Up amount can be easily described in an equation.	Customer testing showed customers want an equation to understand True-Up. This allows customers to track how True-Up is calculated in a simple equation based on the table columns.	Cosmetic change to clarify where numbers in True-Up calculation come from.  The calculation is repeated in the FAQ question below it “How will True-Up be determined?” or “How is True-Up determined?”
D, E 3	P5	FAQs on How Your Annual True-Up Is/Will Be Calculated	Change what is called “Explanation of Calculations” on current bill to an FAQ format focused on How Annual True-Up is/will be	Provides clearer explanation of when True-Up occurs, how the True-Up amount is calculated, as well as what to track	Verbiage change only; uses more customer friendly language.

Attachment – Page	Feature ID(s)	Feature Name	Proposed Change	Benefit	Notes
			calculated; use more customer friendly language.	monthly and what is due monthly.	

**Key area of improvement: Ensure relevant information is prioritized**

To improve customers' ability to find and understand the most important information, key information was moved to the most relevant location, and tables were simplified or made dynamic, where possible. The most significant change in this regard was to limit the information presented on what is typically page 3 to those elements that were relevant to explaining the final True-Up or year-to-date True-Up charges.

**Table 3. Proposed changes to ensure most relevant information is prioritized**

Attachment – Page	Feature ID(s)	Feature Name	Proposed Change	Benefit	Notes
D, E 3	<b>P4</b>	Solar Summary Table	Monthly Minimum Delivery Charges moved to 'Solar Summary Table' (column B) because they are part of the equation that determines the True-Up amount.	Facilitates customer understanding of what determines their True-Up amount.	No substantive change. This element is moved from a separate table on the same page on the current NEM Bill "Electric Charges" to

Attachment – Page	Feature ID(s)	Feature Name	Proposed Change	Benefit	Notes
					instead be included in one single table.
D, E 3	P4	Solar Summary Table	Make table dynamic so that only columns with data relevant to the customer True-Up appear. This means a column for NBC charges (“State Mandated Charges”) or Minimum Grid Supply Charges may be added only if relevant to the customer’s True-Up calculation.	Simplifies the table and the explanations needed by only showing information relevant to the specific customer’s True-Up or year-to-date True-Up.	This is an improvement to the current NEM Energy Statement, because the static table format in the current statement may display extra information that is not factored into the True-Up calculation.
D, E 4	P6	Summary of Energy Use Table	TOU-specific peak, part-peak and off-peak usage information is moved to a table typically on page 4.	This placement helps customers focus only on key elements in the Solar Summary Table (typically on page 3) needed to understand the True-Up calculation. Page 4 then can focus on energy usage during peak/off-peak periods (for TOU customers) and how usage	No substantive change, moved only.

Attachment – Page	Feature ID(s)	Feature Name	Proposed Change	Benefit	Notes
				relates to Solar Net Usage charges.	
D, E 5	P7	Details of Minimum Grid Supply Charges Table	Energy Charges (renamed “Minimum Grid Supply Charges”) are displayed on what is usually page 5. These charges would also appear in the page 3 “Solar Summary Table” (feature P4) only if customer is predicted to pay these charges at True-Up.	Removes unnecessarily complex information from calculation of True-Up, typically on page 3. Brings awareness to Minimum Grid Supply Charges and facilitates understanding of when these charges determine the True-Up amount due.	Moves element from current bill, typically page 3 to proposed bill, typically page 5.

**Key area of improvement: Use more customer-friendly language and define terms**

Throughout the bill, PG&E attempted to simplify descriptive language where possible. We introduced language that refers to “solar” rather than “NEM” based on evidence that the term NEM is confusing to customers; we removed any unnecessarily technical descriptions and defined terms in the bill locations where the charges are relevant. PG&E also attempted to explain when certain types of charges become relevant to determining the True-Up amount due.

**Key area of improvement: Display Monthly Positive Usage and NBCs**

On what is typically page 6 of Attachments D and E, the feature labeled “P8” shows a new table that displays monthly positive net usage<sup>15</sup> — consistent with OP 8 in Resolution E-4792 — as well as month-over-month State Mandated Charges (NBCs). Language has been added to explain what State Mandated Charges are and the scenario under which these charges would determine the True-Up amount due.

State Mandated Charges (NBCs) are listed on page 6 in the current NEM 2.0 bill but details were added in the proposed bill to better explain the charges. A list of rate components that comprise the State Mandated Charges was also added.

**Key area of improvement: Better distinguish between PG&E and CCA charges**

PG&E has responded to CCA stakeholder feedback and made the following changes:

- Clarified when the bill refers to solar generation versus CCA generation
- Improved the distinction between PG&E NEM charges and CCA NEM charges
- Distinguished between the PG&E NEM True-Up schedule and the CCA NEM billing schedule

**Potential Improvement: Educate NEM customers on how to save with TOU rates**

Under the NEM Successor Tariff (NEM 2.0) requirements, all NEM customers must take service under Time-of-Use (TOU) rates. PG&E is currently assessing how to best ensure that the Energy Statement appropriately educates all residential customers about TOU rates and usage. The features labeled “P9” presented in Attachment D, titled “When You Use Energy,” and in Attachment E, titled, “Year-Over-Year Usage,” are placeholders for potential features PG&E may develop for TOU education across all customers, not just

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<sup>15</sup> “Positive net usage” refers to total net hourly imports from the grid over the monthly billing period.

specific to NEM customers. This feature may change as PG&E further explores the best option for this type of education on the Energy Statement.

### **Rate Impacts**

The revisions being proposed in this advice submittal are to improve the clarity and usefulness of the billing information on the customer Energy Statement. The submittal would not increase any current rate or charge, cause the withdrawal of service, or conflict with any rate schedule or rule.

## **9. Demographics and Website Accessibility**

Per OP 10 of D.07-07-047, the following section describes the demographic/linguistic characteristics of PG&E's service area as well as the guidelines PG&E uses to assure website accessibility by the disabled.

### **9.1. Demographics of PG&E's Service Area**

Table 4 includes the top five non-English languages in PG&E's service territory and shows the percentage of all in-language calls to PG&E's call centers accounted for by these five languages for the period 2012 through 2016. PG&E offers residential bills (with the exception of multi-family rate schedules and Direct Access/Community Choice Aggregation customers) in Spanish or Chinese.

**Table 4. Linguistic characteristics of PG&E customer calls**

<b>Language</b>	<b>% of In-Language Calls</b>
Spanish	63.9%
Cantonese	13.2%
Mandarin	9.3%
Vietnamese	5.8%
Tagalog	0.2%



PG&E provides bill inserts to respond to legislative requirements, regulatory requirements or for other purposes. Some of these bill inserts are fully translated, some are partially translated, and some include informational phone numbers for both English and non-English speaking customers. Generally, bill inserts that are required by the legislature provide telephone contact numbers in Spanish and Chinese. This includes, for example, Prop 65 notices and notices of rate proceedings. A list of typical and recurring bill inserts are listed in Table 5.

**Table 5. Typical and recurring bill inserts by language**

<b>Bill Insert</b>	<b>Language</b>
CARE Program Application	Full, Spanish
FERA Program Application	Full, Spanish
Medical Baseline	Contact information in Spanish, Chinese, TDD/TTY (speech, hearing impaired)
Third Party Notification	Full, Spanish, Chinese
Gas Pipeline Safety	Contact information in Spanish, Chinese, Vietnamese
Electromagnetic Fields	Contact information in Spanish
Agricultural Rate Options	Contact information in Spanish, Chinese, TDD/TTY (speech, hearing impaired)
Commercial Rate Options	Contact information in Spanish, Chinese, TDD/TTY (speech, hearing impaired)
Residential Rate Options	Contact information in Spanish, Chinese, TDD/TTY (speech, hearing impaired)
Power Content Label	Contact information in Spanish, Chinese, TDD/TTY (speech, hearing impaired)
Cooling Centers	Full Spanish. Contact information in Chinese, Vietnamese, TDD/TTY (speech, hearing impaired)
New Gas Customer (DOT Gas	English
Meter Reading Schedule English	English

## **9.2. Website Accessibility Guidelines**

At PG&E, our goal is to make our site accessible for everyone. We strive to make it easy for customers to get information and manage their services online. PG&E is committed to improving our website for individuals who use assistive technologies. PG&E aims to comply with the W3 Web Accessibility Initiative (WAI). Our website is designed to conform to Level AA Web Content Accessibility Guidelines (WCAG) 2.0. These guidelines are the most widely adopted set of standards globally. The standards offer the highest level of accessibility across all platforms, including browsers and other assistive technologies. Additionally, PG&E has an appointed disability access coordinator for all www.pge.com content as described in the 2011 General Rate Case (GRC) settlement. If an individual is seeking information for personal use and identifies an inaccessible web page, PG&E will work directly with the individual to provide a reasonable alternative to web access.

## **10. Protests**

Anyone wishing to protest this submittal may do so by letter sent via U.S. mail, facsimile or E-mail, no later than April 16, 2018, which is 21 days<sup>16</sup> after the date of this submittal. Protests must be submitted to:

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

Facsimile: (415) 703-2200  
E-mail: EDTariffUnit@cpuc.ca.gov

Copies of protests also should be mailed to the attention of the Director, Energy Division, Room 4004, at the address shown above.

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<sup>16</sup> The 20-day protest period concludes on a weekend, therefore, PG&E is moving this date to the following business day.

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

Erik Jacobson  
Director, Regulatory Relations  
c/o Megan Lawson  
Pacific Gas and Electric Company  
77 Beale Street, Mail Code B13U  
P.O. Box 770000  
San Francisco, California 94177

Facsimile: (415) 973-3582  
E-mail: PGETariffs@pge.com

Any person (including individuals, groups, or organizations) may protest or respond to an advice letter (General Order 96-B, Section 7.4). The protest shall contain the following information: specification of the advice letter protested; grounds for the protest; supporting factual information or legal argument; name, telephone number, postal address, and (where appropriate) e-mail address of the protestant; and statement that the protest was sent to the utility no later than the day on which the protest was submitted to the reviewing Industry Division (General Order 96-B, Section 3.11).

## **11. Effective Date**

PG&E requests that this Tier 2 advice submittal become effective on regular notice, April 25, 2018 which is 30 calendar days after the date of submittal. Upon approval, PG&E will initiate the IT system changes needed to implement the NEM Energy Statement redesign proposed in this advice submittal. PG&E estimates that the reprogramming of the billing systems will take approximately 12-18 months from approval. This timeframe may change based on existing IT commitments and resources or additional requirements set forth by the Commission.

**12. Notice**

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically and via U.S. mail to parties shown on the attached list and the parties on the service list for A.06-06-026. Address changes to the General Order 96-B service list should be directed to PG&E at email address PGETariffs@pge.com. For changes to any other service list, please contact the Commission's Process Office at (415) 703-2021 or at Process\_Office@cpuc.ca.gov. Send all electronic approvals to PGETariffs@pge.com. Advice letter submittals can also be accessed electronically at: <http://www.pge.com/tariffs/>.

\_\_\_\_\_/S/

Erik Jacobson

Director, Regulatory Relations

cc: Service List A.06-06-026

**Attachments:**

- A. Current Format – Non - NEM Energy Statement – Bundled Service
- B. Current Format – NEM Energy Statement – Bundled Service – Monthly
- C. Current Format – NEM Energy Statement – Bundled Service – At True-Up
- D. Proposed Format NEM Energy Statement – Bundled Service – Monthly
- E. Proposed Format NEM Energy Statement – Bundled Service – At True-Up
- F. Proposed Format NEM Energy Statement – CCA Service – Monthly Statement

# CALIFORNIA PUBLIC UTILITIES COMMISSION

## ADVICE LETTER SUBMITTAL 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 E)**

Utility type:

☒ ELC

☐ GAS

☐ PLC

☐ HEAT

☐ WATER

Contact Person: Annie Ho

Phone #: (415) 973-8794

E-mail: AMHP@pge.com and PGETariffs@pge.com

### EXPLANATION OF UTILITY TYPE

ELC = Electric

GAS = Gas

PLC = Pipeline

HEAT = Heat

WATER = Water

(Date Submitted/ Received Stamp by CPUC)

Advice Letter (AL) #: **5257-E**

**Tier: 2**

Subject of AL: **Revised Energy Statement (Form 01-6630) for Net Energy Metered Customers**

Keywords (choose from CPUC listing): Compliance, Billings, Forms

AL submittal type: ☐ Monthly ☐ Quarterly ☐ Annual ☒ One-Time ☐ Other \_\_\_\_\_

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.07-07-047 & D.16-01-044

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: \_\_\_\_\_

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: N/A

Name(s) and contact information of the person(s) who will provide the nondisclosure agreement and access to the confidential information: \_\_\_\_\_

Resolution Required? ☐ Yes ☒ No

Requested effective date: **April 25, 2018**

No. of tariff sheets: N/A

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: N/A

Service affected and changes proposed: N/A

Pending advice letters that revise the same tariff sheets: N/A

Protests, dispositions, and all other correspondence regarding this AL are due no later than 21 days<sup>1</sup> after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:

**California Public Utilities Commission**

**Energy Division**

**EDTariffUnit**

**505 Van Ness Ave., 4<sup>th</sup> Flr.**

**San Francisco, CA 94102**

**E-mail: EDTariffUnit@cpuc.ca.gov**

**Pacific Gas and Electric Company**

**Attn: Erik Jacobson**

**Director, Regulatory Relations**

**c/o Megan Lawson**

**77 Beale Street, Mail Code B13U**

**P.O. Box 770000**

**San Francisco, CA 94177**

**E-mail: PGETariffs@pge.com**

<sup>1</sup> The 20-day protest period concludes on a weekend, therefore, PG&E is moving this date to the following business day.

## **Attachment A**

***Illustrative Current Format***

**Non-NEM Energy Statement**

Numbers, graphs and messages used in the attached draft energy statements are illustrative and for use in review only.

Attachment A - Current Non-NEM Energy Statement Format – Bundled  
Page 1 of 5



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 02/07/2018  
Due Date: 02/28/2018

### Service For:

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

### Questions about your bill?

Monday-Friday 7 a.m.-9 p.m.  
Saturday 8 a.m.-6 p.m.  
Phone: 1-800-743-5000  
[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

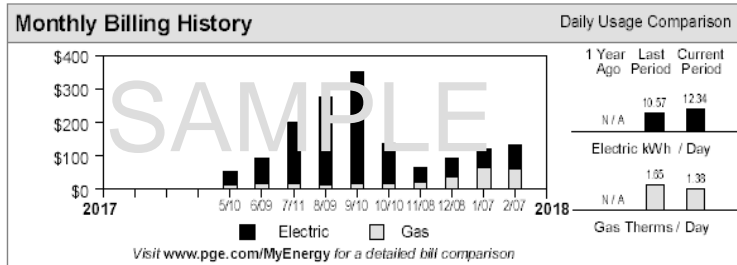
### Local Office Address

705 P ST  
FRESNO, CA 93721

### Your Account Summary

Amount Due on Previous Statement	\$XXX.XX
Payment(s) Received Since Last Statement	-XXX.XX
Previous Unpaid Balance	XXX.XX
Current Electric Charges	
Current Gas Charges	\$XXX.XX

**Total Amount Due by 02/28/2018 \$XXX.XX**



### Important Messages

[Text will vary by customer type and billing period.]

Please return this portion with your payment. No staples or paper clips. Do not fold. Thank you.

XX



Account Number:  
**123456789-0**

Due Date:  
**2/28/2018**

Total Amount Due:  
**\$XXX.XX**

Amount Enclosed:  
\$

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

PG&E  
BOX XXXXXX  
SACRAMENTO, CA 00000



Attachment A - Current Format - Non-NEM Energy Statement– Bundled  
*Page 2 of 5*



**ENERGY STATEMENT**

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 02/07/2018  
**Due Date: 02/28/2018**

**Legal Definitions – NO CHANGE**

Attachment A - Current Format - Non-NEM Energy Statement – Bundled  
Page 3 of 5



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 02/07/2018  
Due Date: 02/28/2018

### Details of Electric Charges

1/06/2018 - 02/05/2018 (31 billing days)

Service for: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: ETOUA RB Residential Time-of-Use Service

1/06/2018 - 02/05/2018

Baseline Allowance	XXX.XX kWh	(31 days x XX.X kWh/day)	
Energy Charges			
Peak	XX.XXXXXX kWh @ \$X.XXXXX		\$XX.XX
Off Peak	XX.XXXXXX kWh @ \$X.XXXXX		-XX.XX
Baseline Credit	XX.XXXXXX kWh @ -\$X.XXXXX		XX.XX
Energy Commission Tax			XX.XX

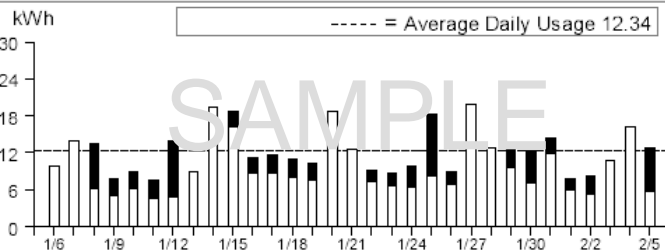
**Total Electric Charges** **\$XXX.XX**

### Service Information

Meter #	XXXXXXXXXX
Consumption	XXX.XXXXXX kWh
Net Generation	XXX.XXXXXX kWh
Total Usage	XXX.XXXXXX kWh
Baseline Territory	R

Heat Source	Not Electric
Serial	N
Rotating Outage Block	1F

### Electric Usage This Period: 382.490300 kWh, 31 billing days



	Usage	Energy Charges
■ Peak <sup>1</sup>	21.11%	\$22.35
□ Off Peak <sup>2</sup>	78.89%	\$79.21

<sup>1</sup>Peak: 3:00pm-8:00pm, M-F (except Holidays);  
<sup>2</sup>Off Peak: All Other Hours



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No:	12345789-0
Statement Date:	02/07/2018
<b>Due Date:</b>	<b>02/28/2018</b>

Details of Gas Charges  
NO CHANGE

Attachment A – Current Format – Non-NEM Energy Statement – Bundled – Monthly  
*Page 5 of 5*



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No:	12345789-0
Statement Date:	02/07/2018
<b>Due Date:</b>	<b>02/28/2018</b>

### Important Messages (continued from page 1)

[Text will vary by customer type and monthly billing period]

## **Attachment B**

### ***Summary Table of Historical Changes 2013-2017***

***and***

### ***Illustrative Current Format***

### ***NEM Energy Statement, Bundled Service, Monthly Statement***

Numbers, graphs and messages used in the attached draft energy statements are illustrative and for use in review only.

Attachment B – Summary Table of Historical NEM Energy Statement Changes 2013-2017

Page	Feature ID	Feature Name	Benefit
1	<b>C1</b>	Your Net Energy Metering (NEM) Account Summary	Enable customers to track the total year-to-date charges they have accumulated. These are their current cumulative charges that will be due at “True-Up.”
3	<b>C2</b>	Summary of NEM Charges	Provides customers a month-over-month and cumulative view of their NEM charges.
3	<b>C3</b>	Electric Charges Table	Helps customers track minimum delivery charges, which is what NEM customers pay on a monthly basis. Table also tracks Energy Charges that may be relevant for determining the True-Up amount.
3	<b>C4</b>	Explanation of Calculations	Helps customers understand what the specific charges are for and how True-Up will be calculated.
3	<b>C5</b>	Year-to-Date NEM Charges Summary Box	Shows how charges are calculated at True-Up and helps customers track year-to-date NEM charges.
4	<b>C6</b>	NEM Charges before Taxes Graph	Provides a visual representation of NEM charges month over month.
4	<b>C7</b>	Cumulative NEM Balance by Month Graph	Provides a visual representation of cumulative charges to help customers track how they are trending toward True-Up.

Page	Feature ID	Feature Name	Benefit
6	<b>C9</b>	Details of NEM Charges	Provides details on charges for the monthly billing period. This information is equivalent to the Details of Electric Charges on a non-NEM Energy Statement (typically on page 3).
6	<b>C10</b>	Average daily usage table	Required per CPUC D.07-07-047 OP 9. This information was moved from page 1 to the Detail of NEM Charges, to make room for the NEM Account Summary. This table is analogous to the Daily Usage Comparison information that appears on page 1 for a non-NEM Customer.

Attachment B – Current Format – NEM Energy Statement - Bundled - Monthly  
Page 1 of 6



## ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

### Service For:

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

### Your Account Summary

Amount Due on Previous Statement	\$XXX.XX
Payment(s) Received Since Last Statement	-XXX.XX
Previous Unpaid Balance	\$XXX.XX
Current Electric Monthly Charges	\$XXX.XX

**Total Amount Due by 01/23/2017 \$XXX.XX**

### Questions about your bill?

Solar Hotline: 1-877-743-4112 M-F 8-5  
General: 1-800-743-5000  
24 hours per day, 7 days per week  
www.pge.com/MyEnergy

### Local Office Address

14040 CHURCH ST  
GUERNEVILLE, CA 95446

### Your Enrolled Programs

Net Energy Metering (NEM2)

### Your Net Energy Metering (NEM) Account Summary

Year-to-date (YTD) NEM charges are based on your YTD usage. Your NEM balance will be reconciled on your annual True-Up statement (09/2017). No credits will be carried over to your next True-Up period. Please see the "Summary of Your NEM YTD Charges" for more details.

Total NEM Charges Before Taxes	\$XXX.XX
Total Electric Minimum Delivery Charges	XX.XX
Estimated Taxes	XX.XX
<b>YTD Estimated NEM Charges At True-Up</b>	<b>\$XXX.XX</b>

C1

### Important Messages

[Text will vary by customer type and billing period.]

Please return this portion with your payment. No staples or paper clips. Do not fold. Thank you.

XX



Account Number:  
**123456789-0**

Due Date:  
**01/23/2017**

Total Amount Due:  
**\$XXX.XX**

Amount Enclosed:

\$

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

PG&E  
BOX XXXXXX  
SACRAMENTO, CA 00000





## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No:	12345789-0
Statement Date:	12/31/2016
<b>Due Date:</b>	<b>01/23/2017</b>

Legal Definitions – NO CHANGE

Attachment B - Current Format – NEM Energy Statement – Bundled – Monthly  
Page 3 of 6



**ENERGY STATEMENT**  
www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

**Summary of Your NEM Year-to-Date (YTD) Charges**

Service for: 1234 MAIN STREET  
Service Agreement ID: XXXXXXXXXX  
Rate Schedule: ETOUA XH Residential Time-of-Use Service

C2

**Summary of NEM Charges**

Bill Period End Date	Net Peak Usage (kWh)	Net Off Peak Usage (kWh)	Net Usage (kWh)	Estimated NEM Charges Before Taxes	Estimated Taxes	Estimated Total NEM Charges
10/31/2016	XXX	XXX	XXX	\$XX.XX	\$XX.XX	\$XX.XX
11/30/2016	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
12/31/2016	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
<b>TOTAL</b>	XXXX	XXXX	XXXX	\$XXX.XX	\$XXX.XX	\$XXX.XX

**Electric Charges**

Bill Period End Date	Minimum Delivery Charges	Energy Charges*
10/31/2016	\$XX.XX	\$XX.XX
11/30/2016	XX.XX	XX.XX
12/31/2016	XX.XX	XX.XX
<b>TOTAL</b>	\$XXX.XX	\$XXX.XX

\*Please go to [pge.com/electric-rates](http://pge.com/electric-rates) to find the generation component of your Energy Charges.

**Explanation of Calculations**

Your YTD Total NEM Charges represent the balance of your net usage since the start of your True-Up period. Charges are calculated each month but are not billed until the end of the True-Up period.

Your Summary of NEM Charges will be reset to zero at True-Up.

The Minimum Delivery Charge is billed monthly and credited at True-Up if the total NEM Charges Before Taxes or total State Mandated Non-Bypassable Charges are greater than your cumulative Minimum Delivery Charges. Refer to detail of NEM Charges page for details about the State Mandated Non-Bypassable Charges.

Energy Charges are commodity costs related to energy usage and will be paid (if a positive amount) at True-Up when your NEM Charges Before Taxes are less than the sum of your total Minimum Delivery Charges and Energy Charges.

This is your YTD balance. Your total NEM balance will be reconciled on your True-Up statement (09/2017)

C3

C4

C5

Total NEM Charges Before Taxes	\$XXX.XX
Total Electric Minimum Delivery Charges	-XXX.XX
Estimated Taxes	XX.XX
<b>YTD Estimated NEM Charges at True-Up</b>	<b>\$XXX.XX</b>

Please contact the Solar Customer Service Center at 1-877-743-4112 for questions about your NEM charges.

Visit [www.pge.com/nembilling](http://www.pge.com/nembilling) for a detailed explanation of NEM billing

Page 3 of 6

Attachment B - Current Format – NEM Energy Statement – Bundled – Monthly  
Page 4 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

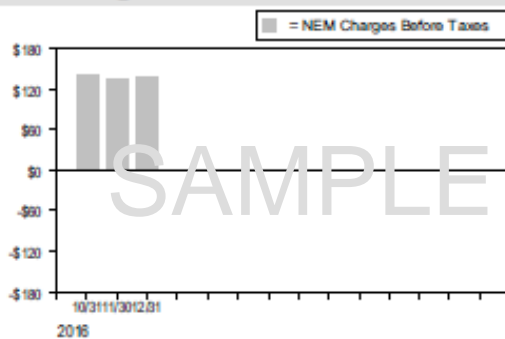
### Summary of Energy Usage

Service for: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: ETOUA XH Residential Time-of-Use Service

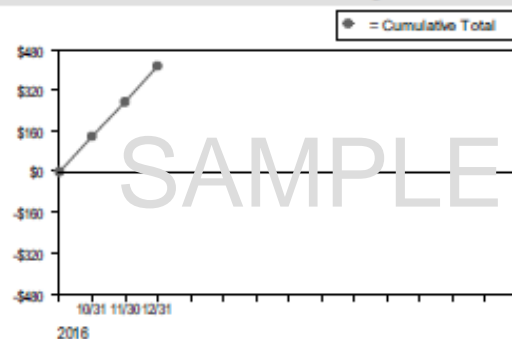
#### NEM Charges Before Taxes



##### Monthly NEM Charges

Monthly NEM Charges represent the cost of the electricity you use each month. You don't pay your monthly NEM balance each month. Instead, your Monthly NEM Charges are added up to calculate your Cumulative NEM balance, which you pay at True-Up.

#### Cumulative NEM Balance by Month



##### Cumulative NEM Balance

Cumulative NEM balance is a running total of your electricity costs and can increase or decrease depending on each month's use and generation. You only pay your Cumulative NEM balance at True-Up.

C6

C7

Attachment B - Current Format – NEM Energy Statement – Bundled – Monthly  
Page 5 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

### Details of Electric Monthly Charges

12/01/2016-12/31/2016 (30 billing days)

Service for: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: ETOUA XH Residential Time-of-Use Service

Enrolled Programs: Net Energy Metering (NEM2)

#### 12/01/2016-12/31/2016

Minimum Delivery Charge	XX days @ \$XX.XXXXX	\$XX.XX
-------------------------	----------------------	---------

San Jose Utility Users Tax (5.000%)		XX.XX
-------------------------------------	--	-------

San Jose Franchise Surcharge		XX.XX
------------------------------	--	-------

**Electric Monthly Charges** **\$XX.XX**

<sup>1</sup>The Minimum Delivery Charge is set by the CPUC. Your electric Minimum Delivery Charge for this period is \$XX.XX. This amount can include applicable discounts and may be deducted at True-Up if your total NEM Charges Before Taxes are greater than your total Minimum Delivery Charges.

### Service Information

Meter #	XXXXXXXXXX
Consumption	XXX.XXXXX kWh
Net Generation	XXX.XXXXX kWh
Total Usage	XXX.XXXXX kWh
Baseline Territory	X
Heat Source	Not Electric
Serial	P
Rotating Outage Block	50

Attach. B - Current Format – NEM Energy Statement – Bundled – Monthly  
Page 6 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

### Details of NEM Charges

12/01/2016-12/31/2016 (30 billing days)

Service for: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: ETOUA XH Residential Time-of-Use Service

Enrolled Programs: Net Energy Metering (NEM2)

#### 12/01/2016-12/31/2016

Baseline Allowance	XXX.XX kWh	(XX days x XX.X kWh/day)	
Net Usage			
Peak	XX.XXXXX kWh	@ \$X.XXXXX	\$XX.XX
Off Peak	XX.XXXXX kWh	@ \$X.XXXXX	XX.XX
NBC Net Usage Adjustment			XX.XX
State Mandated Non-Bypassable Charge <sup>1</sup>			XX.XX
Energy Commission Tax			XX.XX
San Jose Utility Users Tax (5.000%)			XX.XX
San Jose Franchise Surcharge			XX.XX

### Monthly NEM Charges

**\$XXX.XX**

### Details of State Mandated Charges

<sup>2</sup>The State Mandated Non-Bypassable Charge (NBC) cannot be reduced by any need generation credits. If applicable, additional discounts are included in the NBC.

Your NEM Balance will be reconciled on your True-Up statement (mm/yyyy).

### Average Daily Usage (kWh / day)

Last Year	Last Period	Current Period
XX.XX	XX.XX	XX.XX

### Service Information

Meter #	XXXXXXXXXX
Consumption	XXX.XXXXX kWh
Exports	XXX.XXXXX kWh
Total Net Usage	XXX.XXXXX kWh
Baseline Territory	X
Heat Source	Not Electric
Serial	P
Rotating Outage Block	50

### Additional Messages

The State Mandated Non-Bypassable Charge (NBC) is calculated based on your energy usage and is relevant to determine the True-Up amount. This charge includes the following fees: Public Purpose Programs, Nuclear Decommissioning, DWR Bond Charge and Competition Transition Charge. The NBC Net Usage Adjustment is to ensure that you don't pay for NBCs twice.

C9

C10

## **Attachment C**

### ***Summary Table of Historical Changes 2013-2017***

***and***

### ***Illustrative Current Format***

### ***NEM Energy Statement, Bundled Service, Statement at True-Up***

Numbers, graphs and messages used in the attached draft energy statements are illustrative and for use in review only.

Attachment C – Summary Table of Historical NEM Energy Statement Changes 2013-2017

Page	Feature ID	Feature Name	Benefit
1	<b>C1</b>	Your Net Energy Metering (NEM) Account Summary	Enable customers to track the total year-to-date charges they have accumulated. These are their current cumulative charges that are due at “True-Up.”
3	<b>C2</b>	Summary of NEM Charges	Provides customers a month-over-month and cumulative view of their NEM charges.
3	<b>C3</b>	Electric Charges Table	Helps customers track minimum delivery charges, which is what NEM customers pay on a monthly basis. Table also tracks Energy Charges that may be relevant for determining the True-Up amount.
3	<b>C4</b>	Explanation of Calculations	Helps customers understand what the specific charges are for and how True-Up is calculated.
3	<b>C5</b>	Total NEM Charges Due Summary Box	Shows how charges are calculated at True-Up and helps customers track year-to-date NEM charges.
4	<b>C6</b>	NEM Charges before Taxes Graph	Provides a visual representation of NEM charges month over month.
4	<b>C7</b>	Cumulative NEM Balance by Month Graph	Provides a visual representation of cumulative charges to help customers track how they are trending toward True-Up.
5	<b>C8</b>	NEM True-Up Charges	Provides a summary of annual NEM charges

Page	Feature ID	Feature Name	Benefit
6	<b>C9</b>	Details of NEM Charges	Provides details on charges for the monthly billing period. This information is equivalent to the Details of Electric Charges on a non-NEM Energy Statement (typically on page 3).
6	<b>C10</b>	Average daily usage table	Required per CPUC D.07-07-047 OP 9. This information was moved from page 1 to the Detail of NEM Charges, to make room for the NEM Account Summary. This table is analogous to the Daily Usage Comparison information that appears on page 1 for a non-NEM Customer.



Attachment C - Current Format – NEM Energy Statement – Bundled – At True-Up  
Page 1 of 6



## ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

### Service For:

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

### Questions about your bill?

Solar Hotline: 1-877-743-4112 M-F 8-5  
General: 1-800-743-5000  
24 hours per day, 7 days per week  
www.pge.com/MyEnergy

### Local Office Address

111 ALMADEN BLVD  
SAN JOSE, CA 95113

### Your Enrolled Programs

Net Energy Metering (NEM2)

### Your Account Summary

Amount Due on Previous Statement	\$XXX.XX
Payment(s) Received Since Last Statement	-XXX.XX
Previous Unpaid Balance	\$XXX.XX
Current Electric Monthly Charges	\$XXX.XX
Total NEM Charges	XXX.XX
Current Gas Charges	\$XXX.XX

**Total Amount Due by 06/01/2017 \$XXX.XX**

### Your Net Energy Metering (NEM) Account Summary

**This is your True-Up statement.** Please see the "Summary of Your NEM True-Up Period Charges" for more details.

Total NEM Charges Before Taxes	\$XXX.XX
Total Electric Minimum Delivery Charges	-XXX.XX
Taxes	XX.XX

**Total NEM Charges Due \$XXX.XX**

C1

### Important Messages

[Text will vary by customer type and billing period.]

Please return this portion with your payment. No staples or paper clips. Do not fold. Thank you.

XX



Account Number:  
**123456789-0**

Due Date:  
**06/01/2017**

Total Amount Due:  
**\$XXX.XX**

Amount Enclosed:

\$

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

PG&E  
BOX XXXXXXX  
SACRAMENTO, CA 00000



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No:	12345789-0
Statement Date:	05/11/2017
<b>Due Date:</b>	<b>06/01/2017</b>

Legal Definitions – NO CHANGE

# Attachment C - Current Format – NEM Energy Statement – Bundled – At True-Up

## Page 3 of 6



### ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

#### Summary of Your NEM True-Up Period Charges

Service for: 1234 MAIN STREET  
Service Agreement ID: XXXXXXXXXX  
Rate Schedule: E6 XB Residential Time-of-Use Service

C2

#### Summary of NEM Charges

Bill Period End Date	Net Peak Usage (kWh)	Net Part Peak Usage (kWh)	Net Off Peak Usage (kWh)	Net Usage (kWh)	Estimated NEM Charges Before Taxes	Estimated Taxes	Estimated Total NEM Charges
6/8/2016	XXX	XXX	XXX	XXX	\$XX.XX	\$XX.XX	\$XX.XX
7/10/2016	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
8/9/2016	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
9/8/2016	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
10/9/2016	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
11/7/2016	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
12/7/2016	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
1/8/2017	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
2/7/2017	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
3/9/2017	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
4/9/2017	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
5/9/2017	XXX	XXX	XXX	XXX	XX.XX	XX.XX	XX.XX
<b>TOTAL</b>	XXXX	XXXX	XXXX	XXXX	\$XXX.XX	\$XXX.XX	\$XXX.XX

Differences in net usage may occur due to rounding

#### Electric Charges

Bill Period End Date	Minimum Delivery Charges	Energy Charges*
6/8/2016	\$XX.XX	\$XX.XX
7/10/2016	XX.XX	XX.XX
8/9/2016	XX.XX	XX.XX
9/8/2016	XX.XX	XX.XX
10/9/2016	XX.XX	XX.XX
11/7/2016	XX.XX	XX.XX
12/7/2016	XX.XX	XX.XX
1/8/2017	XX.XX	XX.XX
2/7/2017	XX.XX	XX.XX
3/9/2017	XX.XX	XX.XX
4/9/2017	XX.XX	XX.XX
5/9/2017	XX.XX	XX.XX
<b>TOTAL</b>	\$XXX.XX	\$XXX.XX

\*Please go to [pge.com/electricrates](http://pge.com/electricrates) to find the generation component of your Energy Charges.

C3

C4

#### Explanation of Calculations

**This is your True-Up statement.** You are being billed for your total NEM Charges Before Taxes minus your total electricity Minimum Delivery Charges in addition to any applicable charges and taxes.

Since this is your **True-Up Statement**, all electric usage charges and credits are reset to zero starting with your next billing cycle.

The Minimum Delivery Charge is billed monthly and credited at True-Up if the total NEM Charges Before Taxes or total State Mandated Non-Bypassable Charges.

Energy Charges are basic commodity costs related to energy usage. These charges will only be billed at True-Up if they are a positive amount and when the total NEM Charges Before Taxes are less than the sum of your total Minimum Delivery Charges and Energy Charges.

Based on your **Net Usage (kWh)**, the True-Up calculations are:

Total NEM Charges Before Taxes	\$XXX.XX
Total Electric Minimum Delivery Charges	XXX.XX
Taxes	XX.XX
<b>Total NEM Charges Due</b>	<b>\$XXX.XX</b>

C5

Attachment C - Current Format – NEM Energy Statement – Bundled – At True-Up  
Page 4 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

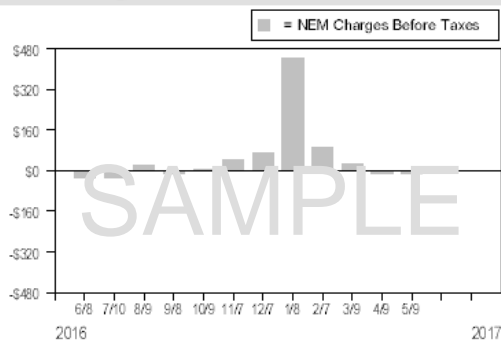
### Summary of Your NEM True-Up Period Charges (continued)

Service for: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: E6 XB Residential Time-of-Use Service

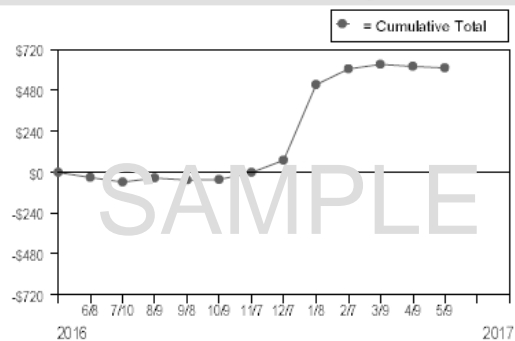
#### NEM Charges Before Taxes



##### Monthly NEM Charges

Monthly NEM Charges represent the cost of the electricity you use each month. You don't pay your monthly NEM balance each month. Instead, your Monthly NEM Charges are added up to calculate your Cumulative NEM balance, which you pay at True-Up.

#### Cumulative NEM Balance by Month



##### Cumulative NEM Balance

Cumulative NEM balance is a running total of your electricity costs and can increase or decrease depending on each month's use and generation. You only pay your Cumulative NEM balance at True-Up.

C6

C7

Attachment C - Current Format – NEM Energy Statement – Bundled – At True-Up  
Page 5 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

### Details of Electric Monthly Charges

04/10/2017-05/09/2017 (30 billing days)

Service for: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: E6 XB Residential Time-of-Use Service

Enrolled Programs: Net Energy Metering (NEM2)

#### 04/10/2017-04/30/2017

Minimum Delivery Charge XX days @ \$XX.XXXX \$XX.XX

San Jose Utility Users Tax (5.000%) XX.XX

San Jose Franchise Surcharge XX.XX

#### 05/01/2017-05/09/2017

Minimum Delivery Charge XX days @ \$XX.XXXX \$XX.XX

San Jose Utility Users Tax (5.000%) XX.XX

San Jose Franchise Surcharge XX.XX

**Electric Monthly Charges \$XX.XX**

### Service Information

Meter # XXXXXXXXXX

Consumption XXX.XXXXXX kWh

Generatio XXX.XXXXXX kWh

Usage XXX.XXXXXX kWh

Territory X

Heat Not Electric

Serial P

Rotating Outage Block 50

### NEM True-Up Charges

#### 05/10/2017-05/09/2017

Total NEM Charges Before Taxes \$XX.XX

Total Electric Minimum Delivery Charges XX.XX

Energy Commission Tax XX.XX

San Jose Utility Users' Tax (5.000%) XX.XX

San Jose Franchise Surcharge XX.XX

**Total NEM Charges \$XX.XX**

<sup>1</sup>The Minimum Delivery Charge is set by the CPUC. Your electric Minimum Delivery Charge for this period is \$10.18. This amount can include applicable discounts and may be deducted at True-Up if your total NEM Charges Before Taxes are greater than your total Minimum Delivery Charges.

C8

Attachment C - Current Format – NEM Energy Statement – Bundled – At True-Up  
Page 6 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

### Details of NEM Charges

04/10/2017-05/09/2017 (30 billing days)

Service for: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: E6 XB Residential Time-of-Use Service

Enrolled Programs: Net Energy Metering (NEM2)

#### 04/10/2017-04/30/2017

Tier 1 Allowance	XXX.XX kWh	(XX days x XX.X kWh/day)	
Tier 1 Net Usage			
Part Peak	XX.XXXXX kWh	@ \$X.XXXXX	\$XX.XX
Off Peak	XX.XXXXX kWh	@ \$X.XXXXX	XX.XX
State Mandated Charge Adjustment			XX.XX
State Mandated Charges			XX.XX
Energy Commission Tax			XX.XX
San Jose Utility Users Tax (5.000%)			XX.XX
San Jose Franchise Surcharge			XX.XX

#### 05/01/2017-05/09/2017

Tier 1 Allowance	XXX.XX kWh	(XX days x XX.X kWh/day)	
Tier 1 Net			
Peak	XX.XXXXX kWh	@ \$X.XXXXX	\$XX.XX
Part Peak	XX.XXXXX kWh	@ \$X.XXXXX	XX.XX
Off Peak	XX.XXXXX kWh	@ \$X.XXXXX	XX.XX
State Mandated Charge Adjustment			XX.XX
State Mandated Charges			XX.XX
San Jose Utility Users Tax (5.000%)			XX.XX
San Jose Franchise Surcharge			XX.XX

### Monthly NEM Charges

\$XX.XX

### Service Information

Meter #	XXXXXXXXXX
Consumption	XXX.XXXXX kWh
Net Generation	XXX.XXXXX kWh
Total Net Usage	XXX.XXXXX kWh
Baseline Territory	X
Heat Source	Not Electric
Serial	P
Rotating Outage Block	50

### Additional Messages

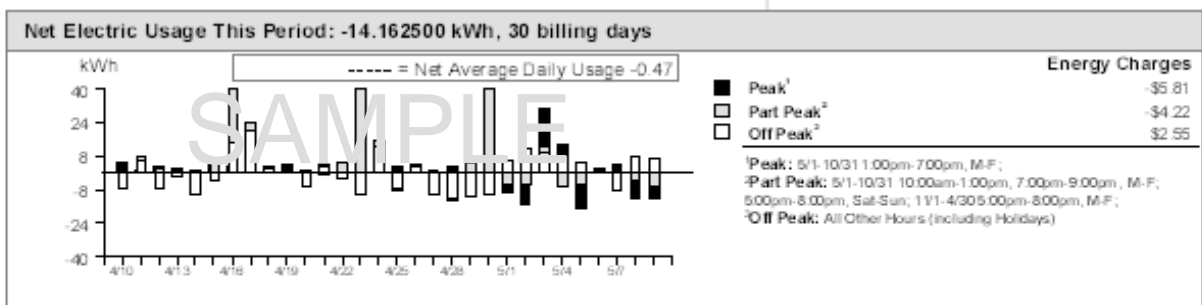
**PLEASE NOTE:** You are enrolled in a Tiered rate plan where the price of energy increases based on the amount of energy used. Effective **March 1**, your rate plan will be simplified and the number of tiers will be reduced from 3 to 2. For more information please visit: [pge.com/tierchange](http://pge.com/tierchange).

### Average Daily Usage (kWh / day)

Last Year	Last Period	Current Period
XX.XX	XX.XX	XX.XX

C9

C10



## **Attachment D**

### ***Summary Table of Proposed Changes***

***and***

### ***Illustrative Proposed Format***

### ***NEM Energy Statement, Bundled Service, Monthly Statement***

Numbers, graphs and messages used in the attached draft energy statements are illustrative and for use in review only.

Attachment D – Summary Table of Proposed Changes, Monthly Statement

Page	Feature ID(s)	Feature Name	Proposed Change	Benefit
1	P1	Solar True-Up Tracking box	Add graphic feature for visual appeal and increase font size to draw attention to year-to-date Solar True-Up charges and True-Up date.	Increase awareness of annual True-Up, track year-to-date charges and when True-Up will be due.
3	P3 P4	True-up equation (P3) tied to table columns (P4)	Add column labels to the table so that columns that determine True-Up amount can be easily described in an equation.	This allows customers to track how True-Up is calculated in a simple equation based on the table columns.
3	P4	Solar Summary Table	Monthly Minimum Delivery Charges moved to 'Solar Summary Table' (column B) because they are part of the equation that determines the True-Up amount.	Facilitates customer understanding of what determines their True-Up amount.
3	P4	Solar Summary Table	Make table dynamic so that only columns with data relevant to the customer True-Up appear.	Simplifies the table and the explanations needed by only showing information relevant to the specific customer's year-to-date True-Up.
3	P5	FAQs on How Your Annual True-Up Will Be Calculated	Change what is called "Explanation of Calculations" on current bill to an FAQ format focused on How Annual True-Up will be calculated; use more customer friendly language.	Provides clearer explanation of when True-Up occurs, how the True-Up amount is calculated, as well as what to track monthly and what is due monthly.
4	P6	Summary of Energy Use Table	TOU-specific peak, part-peak and off-peak usage information is moved to a table typically on page 4.	This helps customers focus only on key elements needed to understand the True-Up calculation (on typically page 3). Page 4 then can focus on energy



Page	Feature ID(s)	Feature Name	Proposed Change	Benefit
				usage during peak/off-peak periods (for TOU customers) and how usage relates to Solar Net Usage charges.
5	P7	Details of Minimum Grid Supply Charges Table	Energy Charges (“Minimum Grid Supply Charges”) are displayed on page 5. These charges would also appear in the page 3 “Solar Summary Table” (feature P4) only if customer is predicted to pay these charges at True-Up.	Removes unnecessarily complex information from calculation of True-Up, typically on page 3. Brings awareness on page 5 to minimum charges while facilitating understanding of when these charges determine the True-Up amount due.
6	P8	Details of State Mandated Charges	Include a new table that displays monthly positive net usage and month-over-month State Mandated Charges (NBCs).	Helps customers understand what State Mandated Charges are and the scenario under which these charges would determine the True-Up amount due.
1	P9	When You Use Energy box	This feature is a place holder for a potential feature PG&E may develop for TOU education.	Educate residential customers about TOU rates and usage.

Attach. D – Proposed Format – NEM Energy Statement – Bundled Service – Monthly  
Page 1 of 6



## ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

### Service For:

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

### Your Account Summary

Amount Due on Previous Statement	\$XX.XX
Payment(s) Received Since Last Statement	- X.XX
Previous Unpaid Balance	\$XX.XX
Minimum Delivery Charges	\$XX.XX
Current Gas Charges	X.XX

### Questions about your bill?

Solar Hotline: 1-877-743-4112 M-F 8-5  
General: 1-800-743-5000  
24 hours per day, 7 days per week  
www.pge.com/MyEnergy

### Local Office Address

14040 CHURCH ST  
GUERNEVILLE, CA 95446

### Your Enrolled Programs

Net Energy Metering (NEM2)

**Total Amount Due by 01/23/2017**

**\$XX.XX**

#### SOLAR TRUE-UP TRACKING



Your True-Up energy charges will be due 9/2017.

The Solar True-Up charges are due once per year at the end of your 12-month cycle.

ESTIMATED  
YEAR TO DATE

**\$XXX.XX**

You are currently in month X of 12.

#### WHEN YOU USE ENERGY

Shift usage and save



Reduce peak hour usage on weekdays from 4–9pm.

Month over Month  
On-Peak Usage

XX kWh

Last Month

XXX kWh

This Month

P1

P9

### Important Messages

[Text will vary by customer type and billing period.]

Please return this portion with your payment. No staples or paper clips. Do not fold. Thank you.

XX



Account Number:  
**123456789-0**

Due Date:  
**01/23/2017**

Total Amount Due:  
**\$XX.XX**

Amount Enclosed:  
\$

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

PG&E  
BOX XXXXXX  
SACRAMENTO, CA 00000



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No	12345789-0
Statement Date	12/31/2016
<b>Due Date:</b>	<b>01/23/2017</b>

Legal Definitions – NO CHANGE

Attach. D - Proposed Format – NEM Energy Statement – Bundled Service – Monthly  
Page 3 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

### Summary of Year-To-Date Solar Charges

Service for: 1234 MAIN STREET  
Service Agreement ID: XXXXXXXXXX  
Rate Schedule: ETOUA

#### Solar Summary: Tracking towards your annual solar True-Up

Solar Net Usage Charges	\$XXX.XX
Minimum Delivery Charges	- XX.XX
Taxes	XX.XX

Year-To-Date Solar Charges At True-Up **\$XXX.XX**

If you Trued-up now, your solar charges would be \$XXX.XX  
(= column A - B + T)

Bill Period End Date	Net Usage (Usage-SolarGen) kWh	(A)	(B)	(T)	Year-To-Date True-Up Charges
		Solar Net Usage Charges	Minimum Delivery Charges (pre tax)	Taxes	
10/31/2016	XXX	\$XXX.XX	\$XX.XX	\$X.XX	
11/30/2016	XXX	XXX.XX	X.XX	X.XX	
12/31/2016	XXX	XXX.XX	XX.XX	X.XX	
<b>TOTAL</b>	XXXX	\$XXX.XX	\$XX.XX	\$X.XX	<b>\$XXX.XX</b>

Charges are not final until your annual True-Up occurs.

(A) Solar Net Usage Charges = Electricity usage charges minus solar credits.

(B) Minimum Delivery Charge = A monthly standard charge to all customers for the delivery of energy to the premises.

### How Your Annual True-Up Will Be Calculated

**When is my True-Up?** As a solar customer you pay for the energy you use once per year at your annual True-Up (09/2017).

**What should I track on a monthly basis?** Solar Net Usage Charges are captured monthly in column A. If the column A Total is a positive number, you may be using more energy than you are generating and may have a balance due at True-Up.

**What do I pay monthly?** The Minimum Delivery Charge, captured in column B, is included in the monthly Amount Due. If your Total Solar Net Usage Charges (A) at True-Up are more than the Total Minimum Delivery Charges (B), the Total Minimum Delivery Charges will be deducted from the balance due.

**How will True-Up be determined?** The True-Up will depend on whether the total of column A or B is greater. If your Total Solar Net Usage Charges (column A) is greater than the monthly amount you were billed (column B), the amount due would be A-B + T. If column B is greater, the monthly amount you were billed is more than your Solar Net Usage Charges and nothing additional is due for True-Up.

**Is there anything else I need to know for True-Up?** Your year-to-date True-Up charges may go up or down month over month due to seasonal electricity usage and solar generation. In some cases, the True-Up amount is affected by State Mandated Charges or Minimum Grid Supply Charges, detailed in bill sections "Details of State Mandated Charges" and "Details of Minimum Grid Supply Charges." Solar Net Usage Charges and credits are reset to zero after True-Up. For more information go to [pge.com/solar](http://pge.com/solar) bill.

Attach. D - Proposed Format – NEM Energy Statement – Bundled Service – Monthly  
Page 4 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

### Summary of Energy Usage

Service For: 1234 MAIN STREET

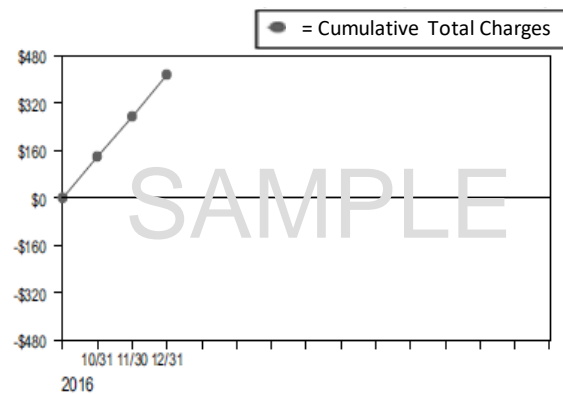
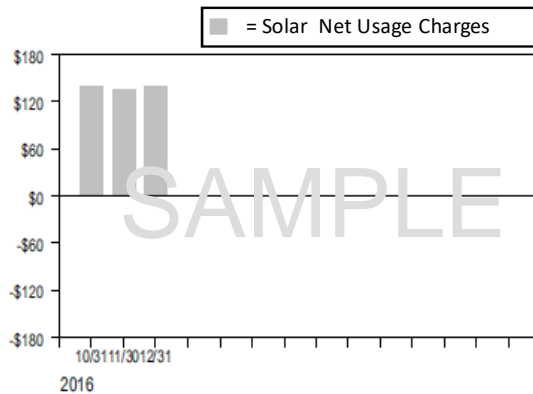
Service Agreement ID: XXXXXXXXXX

Rate Schedule: ETOUA XH Residential Time-of-Use Service

Bill Period End Date	Net Peak Usage (kWh)	Net Off Peak Usage (kWh)	Net Usage (Usage-SolarGen) kWh	Solar Net Usage Charges
10/31/2016	XXX	XXX	XXX	\$XXX.XX
11/30/2016	XX	XXX	XXX	XXX.XX
12/31/2016	XXX	XXX	XXX	XXX.XX
<b>TOTAL</b>	XXX	XXXX	XXXX	\$XXX.XX

P6

### Solar Net Usage Charges By Month



Solar Net Usage Charges are captured monthly and represent the balance of electricity usage charges and solar credits.

This graph represents a running total of your Solar Net Usage Charges and can increase or decrease depending on each month's electricity use and solar generation. The balance is due once per year at your annual True-Up.

Log in at [pge.com/myusage](http://pge.com/myusage) to see month over month and year over year net usage.



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

### Details of Minimum Delivery Charges

12/01/2016 - 12/31/2016 (31 billing days)

Service For: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: ETOUA XH Residential Time-of-Use Service

Enrolled Programs: Net Energy Metering (NEM2)

12/01/2016 - 12/31/2016

Minimum Delivery Charge 31 days @ \$X.XXXXXX \$XX.XX

San Jose Utility Users Tax (5.000%) X.XX

San Jose Franchise Surcharge X.XX

**Minimum Delivery Charges \$XX.XX**

The Minimum Delivery Charge is charged to all customers (those with and without solar) for the delivery of energy to the premises and is approved by the California Public Utilities Commission. This charge is included in the monthly total amount due.

### Service Information

Meter # XXXXXXXXXX

Consumption XX.XXXXXX kWh

Exports X.XXXXXX kWh

Total Net Usage XX.XXXXXX kWh

Baseline Territory X

Heat Source Electric

Serial P

Rotating Outage Block 50

### Details of Minimum Grid Supply Charges

Bill Period End Date	Minimum Grid Supply Charges*
10/31/2016	\$XX.XX
11/30/2016	XX.XX
12/31/2016	XX.XX
<b>TOTAL</b>	<b>\$XXX.XX</b>

\*To find the "Generation" component of your Energy Charges that determines the Minimum Grid Supply Charges, please go to [pge.com/electricrates](http://pge.com/electricrates).

All customers pay a minimum amount for delivery and generation of electricity to serve their premises. The Minimum Grid Supply Charges, for this generation portion, are approved by the California Public Utilities Commission.

If relevant to your True-Up, Minimum Grid Supply Charges will appear in the table "Summary of Year-To-Date Solar Charges."

Minimum Grid Supply Charges are not included in the monthly amount due and would only apply in your True-Up when the following are true:

- 1) The Total Minimum Grid Supply Charges is a positive number,  
AND
- 2) The sum of your Total Minimum Delivery Charges plus Total Minimum Grid Supply Charges are greater than both (a) Total Solar Net Usage Charges and (b) your State-Mandated Charges

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Attach. D - Proposed Format – NEM Energy Statement – Bundled Service – Monthly  
Page 6 of 6



## ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 12/31/2016  
Due Date: 01/23/2017

### Details of Solar Net Usage Charges

12/01/2016 - 12/31/2016 (31 billing days)

Service For: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: ETOUA XH Residential Time-of-Use Service

Enrolled Programs: Net Energy Metering (NEM2)

#### 12/01/2016 - 12/31/2016

Baseline Allowance XXX.XX kWh (31 days x XX.X kWh/day)

#### Net Usage

Peak XXX.XXXXX kWh @ \$XX.XX

Off Peak XXX.XXXXX kWh @ XX.XX

Baseline Credit XXX.XXXXX kWh @ XX.XX

State Mandated Charge Adjustment XX.XX

State Mandated Charges XX.XX

Energy Commission Tax X.XX

San Jose Utility Users' Tax (5.000%) X.XX

San Jose Franchise Surcharge X.XX

**Estimated Total Solar Charges<sup>1</sup> \$XXX.XX**

<sup>1</sup>Your Total Solar Charges are captured monthly and charged on your annual True-Up statement (09/2017).

### Details of State Mandated Charges

Your State Mandated Charges are relevant to determine your annual True-Up amount. These charges pay for State policies such as the public purpose programs created to benefit customers, including low-income ratepayer assistance and energy efficiency. These are also referred to as "Non-Bypassable Charges."

Bill Period End Date	Positive Net Usage (kWh)	State Mandated Charges*
10/31/2016	XXX	\$XX.XX
11/30/2016	XX	X.XX
12/31/2016	XX	X.XX
<b>TOTAL</b>	XXX	\$XX.XX

\*If applicable, additional discounts are included in the State Mandated Charges.

State Mandated Charges are calculated based on positive hourly net usage and determine your amount due at True-Up only when the following is true: Your Total State Mandated Charges are greater than your Solar Net Usage Charges and greater than your Total Minimum Delivery Charges.

### Service Information

Meter # XXXXXXXXX

Consumption XX.XXXXX kWh

Exports X.XXXXX kWh

Total Net Usage kWh

Baseline Territory X

Heat Source Electric

Serial P

Rotating Outage Block 50

Your State Mandated Charges are comprised of the following programs and associated rates (\$/kWh) prior to discounts:

12/01/2016-12/31/2016	
Public Purpose Programs	XXXXX
Nuclear Decommissioning	XXXXX
DWR Bond Charge	XXXXX
Competition Transition Charge	XXXXX

### Additional Messages

The State Mandated Charge Adjustment is to ensure that you don't pay for State Mandated Charges twice. These charges cannot be reduced by any net generation credits.

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## **Attachment E**

### ***Summary Table of Proposed Changes***

***and***

### ***Illustrative Proposed Format***

### ***NEM Energy Statement, Bundled Service, Statement at True-Up***

Numbers, graphs and messages used in the attached draft energy statements are illustrative and for use in review only.



Attachment E – Summary Table of Proposed Changes, True-Up Statement

Page	Feature ID(s)	Feature Name	Proposed Change	Benefit
1	P2	Total Solar True-Up Charge Details box	Add graphic feature for visual appeal and increase font size to draw attention to final Solar True-Up Charges.	Increases awareness that this is the True-Up statement and of the final True-Up amount due. Shows the calculation that determines the Total Solar True-Up Charges.
3	P3 P4	True-up equation (P3) tied to table columns (P4)	Add column labels to the table so that columns that determine True-Up amount can be easily described in an equation.	This allows customers to track how True-Up is calculated in a simple equation based on the table columns.
3	P4	Solar Summary Table	Monthly Minimum Delivery Charges moved to 'Solar Summary Table' (column B) because they are part of the equation that determines the True-Up amount.	Facilitates customer understanding of what determines their True-Up amount.
3	P4	Solar Summary Table	Make table dynamic so that only columns with data relevant to the customer True-Up appear.	Simplifies the table and the explanations needed by only showing information relevant to the specific customer's True-Up.
3	P5	FAQs on How Your Annual True-Up Is Calculated	Change what is called "Explanation of Calculations" on current bill to an FAQ format focused on How Annual True-Up is calculated; use more customer friendly language.	Provides clearer explanation of when True-Up occurs, how the True-Up amount is calculated, as well as what to track monthly and what is due monthly.
4	P6	Summary of Energy Use Table	TOU-specific peak, part-peak and off-peak usage information is moved to a table typically on page 4.	This helps customers focus only on key elements needed to understand the True-Up calculation (on typically page 3). Page 4 then can focus on

Page	Feature ID(s)	Feature Name	Proposed Change	Benefit
				energy usage during peak/off-peak periods (for TOU customers) and how usage relates to Solar Net Usage charges.
5	P7	Details of Minimum Grid Supply Charges Table	Energy Charges (“Minimum Grid Supply Charges”) are displayed on page 5. These charges would also appear in the page 3 “Solar Summary Table” (feature P4) only if customer is predicted to pay these charges at True-Up.	Removes unnecessarily complex information from calculation of True-Up, typically on page 3. Brings awareness on page 5 to minimum charges while facilitating understanding of when these charges determine the True-Up amount due.
6	P8	Details of State Mandated Charges	Include a new table that displays monthly positive net usage and month-over-month State Mandated Charges (NBCs).	Helps customers understand what State Mandated Charges are and the scenario under which these charges would determine the True-Up amount due.
1	P9	Year-Over-Year Usage box	This feature is a place holder for a potential feature PG&E may develop for TOU education.	Educate residential customers about TOU rates and usage.



## ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

### Service For:

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

### Questions about your bill?

Solar Hotline: 1-877-743-4112 M-F 8-5  
General: 1-800-743-5000  
24 hours per day, 7 days per week  
www.pge.com/MyEnergy

### Local Office Address

111 ALMADEN BLVD  
SAN JOSE, CA 95113

### Your Enrolled Programs

Net Energy Metering (NEM2)

### Your Account Summary

Amount Due on Previous Statement	\$XXX.XX
Payment(s) Received Since Last Statement	-XXX.XX
Previous Unpaid Balance	\$XXX.XX
Minimum Delivery Charges	\$XXX.XX
Total Solar True-Up Charges	XXX.XX
Current Gas Charges	XXX.XX

**Total Amount Due by 06/01/2017 \$XXX.XX**

#### TOTAL SOLAR TRUE-UP CHARGE DETAILS

\$ XXX.XX SOLAR NET USAGE CHARGES  
- \$ XXX.XX 12-MONTH TOTAL OF  
PREVIOUSLY BILLED MINIMUM DELIVERY CHARGES  
+ \$ XX.XX TAXES  
= \$XXX.XX TOTAL SOLAR  
TRUE-UP CHARGES

This is your True-Up Statement

#### YEAR-OVER-YEAR USAGE



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### Important Messages

[Text will vary by customer type and billing period.]

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Please return this portion with your payment. No staples or paper clips. Do not fold. Thank you.

XX



Account Number: 123456789-0 Due Date: 06/01/2017 Total Amount Due: \$XXX.XX

Amount Enclosed:  
\$

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

PG&E  
BOX XXXXXXX  
SACRAMENTO, CA 00000



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No:	12345789-0
Statement Date:	05/11/2017
<b>Due Date:</b>	<b>06/01/2017</b>

Legal Definitions – NO CHANGE

Attach. E - Proposed Format – NEM Energy Statement – Bundled Service – At True-Up  
Page 3 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

### Summary of Solar True-Up Charges

Service for: 1234 MAIN STREET  
Service Agreement ID: XXXXXXXXXX  
Rate Schedule: E6 XB Residential Time-of-Use Service

#### Solar True-Up

Total Solar Net Usage Charges	\$XXX.XX
Total Minimum Delivery Charges	-XXX.XX
Taxes	XX.XX
<b>Total Solar True-Up Charges</b>	<b>\$XXX.XX</b>

Your Solar True-Up  
Charges are  
\$XXX.XX  
(= column A - B + T).

	(A)	(B)	(T)	
Bill Period End Date	Net Usage (Usage - SolarGen) kWh	Solar Net Usage Charges	Minimum Delivery Charges (Pre Tax)	Taxes
6/8/2016	XXX	\$XX.XX	\$XX.XX	\$XX.XX
7/10/2016	XXX	XX.XX	XX.XX	XX.XX
8/9/2016	XXX	XX.XX	XX.XX	XX.XX
9/8/2016	XXX	XX.XX	XX.XX	XX.XX
10/9/2016	XXX	XX.XX	XX.XX	XX.XX
11/7/2016	XXX	XX.XX	XX.XX	XX.XX
12/7/2016	XXX	XX.XX	XX.XX	XX.XX
1/8/2017	XXX	XX.XX	XX.XX	XX.XX
2/7/2017	XXX	XX.XX	XX.XX	XX.XX
3/9/2017	XXX	XX.XX	XX.XX	XX.XX
4/9/2017	XXX	XX.XX	XX.XX	XX.XX
5/9/2017	XXX	XX.XX	XX.XX	XX.XX
<b>TOTAL</b>	<b>XXXX</b>	<b>\$XXX.XX</b>	<b>\$XXX.XX</b>	<b>\$XX.XX</b>

(A) Solar Net Usage Charges = Electricity usage charges minus solar credits.

(B) Minimum Delivery Charge = A monthly standard charge to all customers for the delivery of energy to the premises.

### How Your Annual True-Up Is Calculated

**When is my True-Up?** As a solar customer you pay for the energy you use once per year at your annual True-Up.  
**This is your annual True-Up Statement.**

**How is True-Up Determined?** Your True-Up is determined by summing all of your monthly billed Minimum Delivery Charges (Column B) and comparing to the total of your Solar Net Usage Charges (Column A). Since Column A is greater, the balance due is the Total Solar Net Usage Charges, reduced by the Total Minimum Delivery Charges you have already paid, plus any applicable taxes due (A - B + T).

**Is there anything else I need to know for True-Up?** Solar Net Usage Charges and credits are reset to zero after True-Up. For more information go to [pge.com/solarbilling](http://pge.com/solarbilling).

Attach. E - Proposed Format – NEM Energy Statement – Bundled Service – At True-Up  
Page 4 of 6



# ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

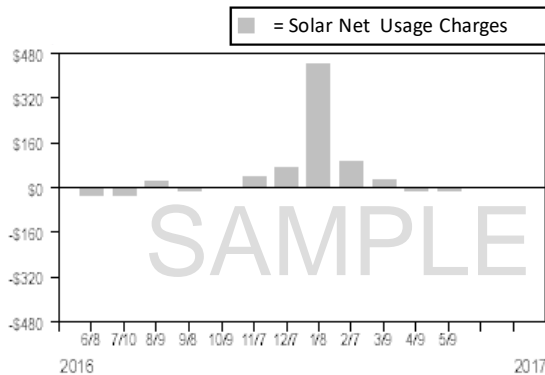
## Summary of Energy Usage

Service for: 1234 MAIN STREET  
Service Agreement ID: XXXXXXXXXX  
Rate Schedule: E6 XB Residential Time-of-Use Service

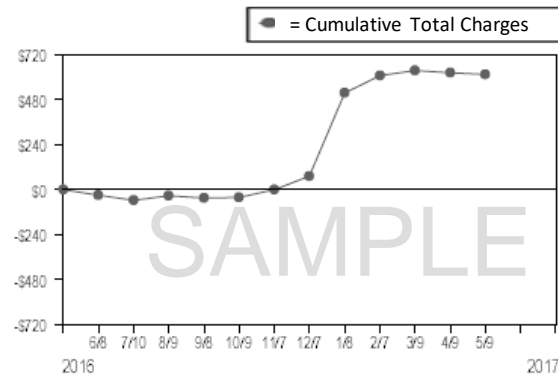
Bill Period End Date	Net Part Peak Usage (kWh)	Net Off Peak Usage (kWh)	Net Usage (Usage - SolarGen) kWh	Solar Net Usage Charges
6/8/2016	XXX	XXX	XXX	\$XX.XX
7/10/2016	XXX	XXX	XXX	XX.XX
8/9/2016	XXX	XXX	XXX	XX.XX
9/8/2016	XXX	XXX	XXX	XX.XX
10/9/2016	XXX	XXX	XXX	XX.XX
11/7/2016	XXX	XXX	XXX	XX.XX
12/7/2016	XXX	XXX	XXX	XX.XX
1/8/2017	XXX	XXX	XXX	XX.XX
2/7/2017	XXX	XXX	XXX	XX.XX
3/9/2017	XXX	XXX	XXX	XX.XX
4/9/2017	XXX	XXX	XXX	XX.XX
5/9/2017	XXX	XXX	XXX	XX.XX
<b>TOTAL</b>	XXXX	XXXX	XXXX	\$XXX.XX

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## Solar Net Usage Charges By Month



Solar Net Usage Charges are captured monthly and represent the balance of electricity usage charges and solar credits.



This graph represents a running total of your Solar Net Usage Charges and can increase or decrease depending on each month's electricity use and solar generation. The balance is due once per year at your annual True-Up.

Log in at [pge.com/myusage](http://pge.com/myusage) to see month over month and year over year net usage.

Attach. E - Proposed Format – NEM Energy Statement – Bundled Service – At True-Up  
Page 5 of 6



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

### Details of Minimum Delivery Charges

04/10/2017-05/09/2017 (30 billing days)

Service for: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXX

Rate Schedule: E6 XB Residential Time-of-Use Service

Enrolled Programs: Net Energy Metering (NEM2)

#### 04/10/2017-04/30/2017

Minimum Delivery Charge	XX days @ \$X.XXXXX	\$X.XX
San Jose Utility Users Tax (5.000%)		XX.XX
San Jose Franchise Surcharge		XX.XX

#### 05/01/2017-05/09/2017

Minimum Delivery Charge	XX days @ \$X.XXXXX	\$X.XX
San Jose Utility Users Tax (5.000%)		XX.XX
San Jose Franchise Surcharge		XX.XX

**Minimum Delivery Charges \$X.XXX**

### Total Solar True-Up Charges

#### 05/10/2016-05/09/2017

Total Solar Net Usage Charges	\$XXX.XX
Total Minimum Delivery Charges	XX.XX
Energy Commission Tax	XX.XX
San Jose Utility Users Tax (5.000%)	XX.XX
San Jose Franchise Surcharge	XX.XX

**Total Solar True-Up Charges \$X.XXX**

### Service Information

Meter #	XXXXXXXXXX
Consumption	XXX.XXXXX kWh
Exports	XXX.XXXXX kWh
Total Net Usage	XXX.XXXXX kWh
Baseline Territory	X
Heat Source	Not Electric
Serial	P
Rotating Outage Block	50

### Details of Minimum Grid Supply Charges

Bill Period End Date	Minimum Grid Supply Charges*
6/8/2016	\$XX.XX
7/10/2016	XX.XX
8/9/2016	XX.XX
9/8/2016	XX.XX
10/9/2016	XX.XX
11/7/2016	XX.XX
12/7/2016	XX.XX
1/8/2017	XX.XX
2/7/2017	XX.XX
3/9/2017	XX.XX
4/9/2017	XX.XX
5/9/2017	XX.XX
<b>TOTAL</b>	<b>\$XXX.XX</b>

All customers pay a minimum amount for delivery and generation of electricity to serve their premises. The Minimum Grid Supply Charges, for this generation portion, are approved by the California Public Utilities Commission.

Minimum Grid Supply Charges are not included in the monthly amount due and would only apply in your True-Up when the following are true:

- 1) The Total Minimum Grid Supply Charges is a positive number, AND
- 2) The sum of your Total Minimum Delivery Charges plus Total Minimum Grid Supply Charges are greater than both (a) Total Solar Net Usage Charges and (b) your State-Mandated Charges

Based on this, Minimum Grid Supply Charges do not apply in your True-Up amount due.

\*To find the "Generation" component of your Energy Charges that determines the Minimum Grid Supply Charges, please go to [pge.com/electricrates](http://pge.com/electricrates).

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# Attach. E - Proposed Format – NEM Energy Statement – Bundled Service – At True-Up Page 6 of 6



## **ENERGY STATEMENT** www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 05/11/2017  
Due Date: 06/01/2017

### Details of Solar Net Usage Charges

04/10/2017-05/09/2017 (30 billing days)  
Service for: 1234 MAIN STREET  
Service Agreement ID: XXXXXXXXXX  
Rate Schedule: E6 XB Residential Time-of-Use Service  
Enrolled Programs: Net Energy Metering (NEM2)

#### 04/10/2017-04/30/2017

Tier 1 Allowance	XXX.XX kWh	(XX days x XX.X kWh/day)	
Tier 1 Net Usage			
Part Peak	XX.XXXXXX kWh	@ \$X.XXXXX	\$XX.XX
Off Peak	XX.XXXXXX kWh	@ \$X.XXXXX	XX.XX
State Mandated Charge Adjustment			XX.XX
State Mandated Charges			XX.XX
Energy Commission Tax			XX.XX
San Jose Utility Users Tax (5.000%)			XX.XX
San Jose Franchise Surcharge			XX.XX

#### 05/01/2017-05/09/2017

Tier 1 Allowance	XXX.XX kWh	(XX days x XX.X kWh/day)	
Tier 1 Net			
Peak	XX.XXXXXX kWh	@ \$X.XXXXX	\$XX.XX
Part Peak	XX.XXXXXX kWh	@ \$X.XXXXX	XX.XX
Off Peak	XX.XXXXXX kWh	@ \$X.XXXXX	XX.XX
State Mandated Charge Adjustment			XX.XX
State Mandated Charges			XX.XX
San Jose Utility Users Tax (5.000%)			XX.XX
San Jose Franchise Surcharge			XX.XX

**This Month Solar Charges** **\$XXX.XX**

### Details of State Mandated Charges

Your State Mandated Charges are relevant to determine your annual True-Up amount. These charges pay for State policies such as the public purpose programs created to benefit customers, including low-income ratepayer assistance and energy efficiency. These are also referred to as "Non-Bypassable Charges."

Bill Period End Date	Positive Net Usage (kWh)	State Mandated Charges*
6/8/2016	XXX	\$XX
7/10/2016	XXX	XX
8/9/2016	XXX	XX
9/8/2016	XXX	XX
10/9/2016	XXX	XX
11/7/2016	XXX	XX
12/7/2016	XXX	XX
1/8/2017	XXX	XX
2/7/2017	XXX	XX
3/9/2017	XXX	XX
4/9/2017	XXX	XX
5/9/2017	XXX	XX
<b>TOTAL</b>	<b>XXX</b>	<b>\$XX</b>

\*If applicable, additional discounts are included in the State Mandated Charges.

State Mandated Charges are calculated based on positive hourly net usage and determine your amount due at True-Up only when the following is true: Your Total State Mandated Charges are greater than your Solar Net Usage Charges and greater than your Total Minimum Delivery Charges.

### Service Information

Meter #	XXXXXXXXXXXX
Consumption	XXX.XXXXX kWh
Exports	XXX.XXXXX kWh
Total Net Usage	XXX.XXXXX kWh
Baseline Territory	X
Heat Source	Not Electric
Serial	P
Rotating Outage Block	50

Your State Mandated Charges are comprised of the following programs and associated rates (\$/kWh) prior to discounts:

04/10/2017-05/09/2017	
Public Purpose Programs	XXXX
Nuclear Decommissioning	XXXX
DWR Bond Charge	XXXX
Competition Transition Charge	XXXX

### Additional Messages

The State Mandated Charge Adjustment is to ensure that you don't pay for State Mandated Charges twice. These charges cannot be reduced by any net generation credits.

**PLEASE NOTE:** You are enrolled in a Tiered rate plan where the price of energy increases based on the amount of energy used. Effective **March 1**, your rate plan will be simplified and the number of tiers will be reduced from 3 to 2. For more information please visit: [pge.com/tierchange](http://pge.com/tierchange).

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## **Attachment F**

### ***Illustrative Proposed Format***

#### ***NEM Energy Statement, CCA Service, Statement at True-Up***

Numbers, graphs and messages used in the attached draft energy statements are illustrative and for use in review only.



## ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 06/07/2017  
Due Date: 06/28/2017

### Service For:

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

### Questions about your bill?

Solar Hotline: 1-877-743-4112 M-F 8-5  
General: 1-800-743-5000  
24 hours per day, 7 days per week  
www.pge.com/MyEnergy

### Local Office Address

111 STONY CIR  
SANTA ROSA, CA 95401

### Your Enrolled Programs

Net Energy Metering (NEM2)

### Your Account Summary

Amount Due on Previous Statement	\$XX.XX
Payment(s) Received Since Last Statement	- XX.XX
Previous Unpaid Balance	\$X.XX
PG&E Minimum Delivery Charges	\$XX.XX
Sonoma Clean Power Electric Generation Charges	X.XX
Current Gas Charges	XX.XX

**Total Amount Due by 06/28/2017** **\$XX.XX**

### SOLAR TRUE-UP TRACKING



Your True-Up energy charges  
will be due 12/2017

The Solar True-Up charges are  
due once per year at the end of  
your 12-month cycle.

ESTIMATED  
YEAR TO DATE

**\$X.XX**

You are currently  
in month X of 12.

### WHEN YOU USE ENERGY

Shift usage and save  
 Reduce peak  
hour usage on  
weekdays  
from 4–9pm.

Month over Month  
On-Peak Usage

XX kWh	Last Month
XXX kWh	This Month

### Important Messages

[Text will vary by customer type and billing period.]

Please return this portion with your payment. No staples or paper clips. Do not fold. Thank you.

XX



Account Number:	Due Date:	Total Amount Due:
123456789-0	06/28/2017	\$XX.XX

Amount Enclosed:
\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

CUSTOMER NAME  
1234 MAIN STREET  
ADDRESS LINE 2  
ANYTOWN, CA 00000

PG&E  
BOX XXXXXX  
SACRAMENTO, CA 00000



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 06/07/2017  
**Due Date: 06/28/2017**

**Legal Definitions – NO CHANGE**

Attach. F - Proposed Format – NEM Energy Statement – CCA Customer – Monthly  
Page 3 of 8



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 06/07/2017  
Due Date: 06/28/2017

### Summary of Year-To-Date Solar Charges

Service For: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXXXX

Rate Schedule: ETOUB Residential Time-of-Use Service

Solar Summary: Tracking towards your annual PG&E solar True-Up		
	Not Charged	Charged
Solar Net Usage Charges	\$XX.XX	
Minimum Delivery Charges	XX.XX	
<b>Year-To-Date Solar Charges At True-Up</b>		<b>\$X.XX</b>

If you Trued-Up now, your solar charges would be \$X.XX.  
(Because column B is greater than A, nothing additional would be due.)

	(A)	(B)	(T)	
Bill Period End Date	Net Usage (Usage - SolarGen) kWH	Solar Net Usage Charges	Minimum Delivery Charges (pre tax)	Taxes
1/30/2017	XXX	\$XX.XX	\$X.XX	\$X.XX
3/1/2017	XXX	XX.XX	X.XX	X.XX
3/30/2017	XX	XX.XX	X.XX	X.XX
5/1/2017	XXX	XX.XX	XX.XX	X.XX
5/31/2017	XXX	XX.XX	X.XX	X.XX
<b>TOTAL</b>	XX	\$XX.XX	\$XX.XX	\$X.XX

Charges are not final until your True-Up occurs.

**(A) Solar Net Usage Charges** = Electricity usage charges minus solar credits.

**(B) Minimum Delivery Charge** = A standard charge to all customers for the delivery of energy to the premises.

### How Your Annual True-Up Will Be Calculated

**When is my True-Up?** As a solar customer you pay for your PG&E solar net usage charges once per year at your annual True-Up (MM/YYYY). Your CCA charges will be paid on a schedule determined by your CCA. See your CCA charges summary on this statement.

**What should I track on a monthly basis?** Solar Net Usage Charges are captured monthly in column A. If the column A Total is a positive number, you may be using more energy than you are generating and may have a balance due at True-Up.

**What do I pay monthly?** The Minimum Delivery Charge, captured in column B, is included in the monthly Amount Due. If your Total Solar Net Usage Charges (A) at True-Up are more than the Total Minimum Delivery Charges (B), the Total Minimum Delivery Charges will be deducted from the balance due. Please note, you may have generation charges billed monthly from your CCA on this statement.

**How will True-Up be determined?** The True-Up will depend on whether the total of column A or B is greater. If your Total Solar Net Usage Charges (column A) is greater than the monthly amount you were billed (column B), the amount due would be A-B + T. If column B is greater, the monthly amount you were billed is more than your solar net usage charges and nothing additional is due for True-Up.

**Is there anything else I need to know for True-Up?** Your year-to-date True-Up charges may go up or down month over month due to seasonal electricity usage and solar generation. In some cases, the True-Up amount is affected by State Mandated Charges, detailed in section "Details of State Mandated Charges". Solar Net Usage Charges and credits are reset to zero after True-Up. For more information go to [pge.com/solarbill](http://pge.com/solarbill).

Attach. F - Proposed Format – NEM Energy Statement – CCA Customer – Monthly  
Page 4 of 8



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 06/07/2017  
Due Date: 06/28/2017

### Summary of Energy Usage

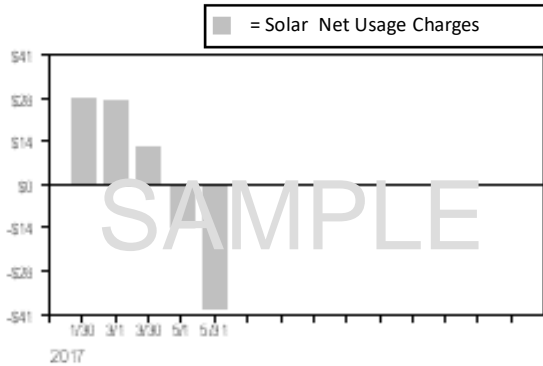
05/02/2017 - 05/31/2017 (30 billing days)

Service Agreement ID: XXXXXXXXXX

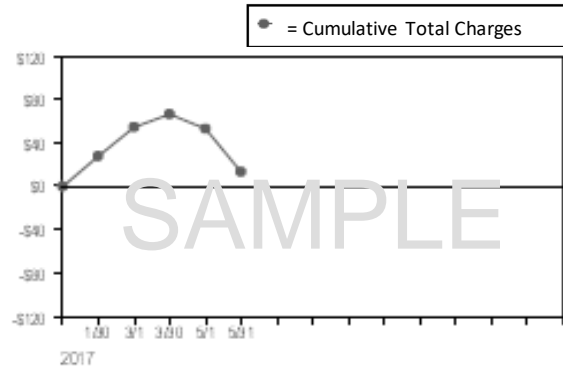
Rate Schedule: ETOUB Residential Time-of-Use Service

Bill Period End Date	Net Peak Usage (kWh)	Net Off Peak Usage (kWh)	Net Usage (Usage -SolarGen) kWh	Solar Net Usage Charges
01/30/2017	XX	XXX	XXX	\$XX.XX
03/01/2017	XX	XXX	XXX	XX.XX
03/30/2017	XX	X	XX	XX.XX
05/01/2017	XX	XXX	XXX	XX.XX
05/31/2017	XX	XXX	XXX	XX.XX
<b>TOTAL</b>	XXX	XXX	XX	\$XX.XX

### PG&E Solar Net Usage Charges By Month



Solar Net Usage Charges for the delivery of energy are captured monthly and represent the balance of electricity usage charges and solar credits.



This graph represents a running total of your Estimated Solar Net Usage Charges and can increase or decrease depending on each month's electricity use and solar generation. The balance is due once per year at your annual True-Up.

Log in at [pge.com/myusage](http://pge.com/myusage) to see month over month and year over year net usage.

Attach. F - Proposed Format – NEM Energy Statement – CCA Customer – Monthly  
Page 5 of 8



## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No: 12345789-0  
Statement Date: 06/07/2017  
Due Date: 06/28/2017

### Details of PG&E Minimum Delivery Charges

05/02/2017 - 05/31/2017 (30 billing days)

Service For: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: ETOUB Residential Time-of-Use Service

Enrolled Programs: Net Energy Metering (NEM2)

05/02/2017 - 05/31/2017

Minimum Delivery Charge	30 days @ \$X.XXXXX	\$X.XX
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Santa Rosa Utility Users' Tax (X.XXX%)		X.XX
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<b>Minimum Delivery Charges</b>		<b>\$XX.XX</b>
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The Minimum Delivery Charge is charged to all customers (those with and without solar) for the delivery of energy to the premises and is approved by the California Public Utilities Commission. This charge is included in the monthly total amount due.

### Service Information

Meter #	XXXXXXXXXX
Consumption	XXX.XXXXXX kWh
Exports	XXX.XXXXXX kWh
Total Net Usage	XXX.XXXXXX kWh
Heat Source	Not Electric
Serial	H
Rotating Outage Block	50

Attach. F - Proposed Format – NEM Energy Statement – CCA Customer – Monthly  
Page 6 of 8



## ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 06/07/2017  
Due Date: 06/28/2017

### Details of PG&E Solar Net Charges

05/02/2017 - 05/31/2017 (30 billing days)

Service For: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX

Rate Schedule: ETOUB Residential Time-of-Use Service

Enrolled Programs: Net Energy Metering (NEM2)

### 05/02/2017 - 05/31/2017 (30 billing days)

Net Usage			
Peak	XX.XXXXXX kWh	@ \$X.XXXXX	\$X.XX
Off Peak	XXX.XXXXXX kWh	@ \$X.XXXXX	XX.XX
State Mandated Charge Adjustment			X.XX
State Mandated Charges			X.XX
Generation Credit			XX.XX
Power Charge Indifference Adjustment			X.XX
Franchise Fee Surcharge			X.XX
Santa Rosa Utility Users' Tax (X.XXX%)			X.XX

**Estimated Total Solar Charges<sup>1</sup> \$XX.XX**

<sup>1</sup>Your Total Solar Charges are captured monthly and charged on your annual True-Up statement (XX/XXXX).

### Details of State Mandated Charges

Your State Mandated Charges are relevant to determine your annual True-Up amount. These charges pay for State policies such as the public purpose programs created to benefit customers, including low-income ratepayer assistance and energy efficiency. These are also referred to as "Non-Bypassable Charges."

Bill Period End Date	Positive Net Usage (kWh)	State Mandated Charges <sup>*</sup>
01/30/2017	X,XXX	\$X.XX
03/01/2017	X,XXX	X.XX
03/30/2017	X,XXX	X.XX
05/01/2017	X,XXX	X.XX
05/31/2017	X,XXX	X.XX
<b>TOTAL</b>	<b>X,XXX</b>	<b>\$X.XX</b>

<sup>\*</sup>If applicable, additional discounts are included in the State Mandated Charges.

State Mandated Charges are calculated based on positive hourly net usage and determine your amount due at True-Up only when the following is true: Your Total State Mandated Charges are greater than your Solar Net Usage Charges and greater than your Total Minimum Delivery Charges.

### Service Information

Meter #	XXXXXXXXXX
Consumption	XXX.XXXXXX kWh
Exports	XXX.XXXXXX kWh
Total Net Usage	XXX.XXXXXX kWh
Heat Source	Not Electric
Serial	H
Rotating Outage Block	50

Your State Mandated Charge is comprised of the following programs and associated rates (\$/kWh) prior to discounts:

05/02/2017 - 05/31/2017 (30 billing days)	
Public Purpose Programs	XXXXXX
Nuclear Decommissioning	XXXXXX
DWR Bond Charge	XXXXXX
Competition Transition Charge	XXXXXX

### Additional Messages

The State Mandated Charge Adjustment is to ensure that you don't pay for State Mandated Charges twice. These charges cannot be reduced by any net generation credits.

Attach. F - Proposed Format – NEM Energy Statement – CCA Customer – Monthly  
Page 7 of 8



## ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 12345789-0  
Statement Date: 06/07/2017  
Due Date: 06/28/2017

### Details of Sonoma Clean Power Electric Generation Charges

05/02/2017 - 05/31/2017 (30 billing days)

Service For: 1234 MAIN STREET

Service Agreement ID: XXXXXXXXXX ESP Customer Number: XXXXXXXXXX

05/02/2017 - 05/31/2017

#### Rate Schedule: NEM E-TO

GENERATION - OFF PEAK - WINTER	XXX.XXXXXX kWh	@ \$X.XXXXX	\$XX.XX
GENERATION - ON PEAK - WINTER	XX.XXXXXX kWh	@ \$X.XXXXX	X.XX
NET GENERATOR BONUS	XX.XXXXXX kWh	@ \$X.XXXXX	X.XX
	NET CHARGES	XX.XX	

Local Utility Users Tax

Energy Surcharge

CREDITED TO NETGREEN BALANCE

X.XX

X.XX

XX.XX

YOUR CUMULATIVE SCP NETGREEN CREDIT BALANCE IS NOW \$XX.XX.

### Total Sonoma Clean Power Electric Generation Charges

\$X.XX

### Service Information

Total Usage XXX.XXXXXX kWh

For questions regarding charges on this page, please contact:

SONOMA CLEAN POWER

PO BOX 1030

SANTA ROSA CA 95402

1-855-202-2139

www.sonomacleanpower.org

### Additional Messages

Sonoma Clean Power (SCP) is Sonoma County's official electric generation provider, supplying electricity that is 37% renewable\* through our default service, CleanStart.

We partner with PG&E who continues to provide billing and power delivery services to our shared customers. SCP offers customers a Net Energy Metering (NEM) program called NetGreen and an optional 100% local renewable premium service called EverGreen.

We invite you to contact us to learn more.

\*Based on the official 2015 California Energy Commission Annual Power Content Label Calculation.





## ENERGY STATEMENT

[www.pge.com/MyEnergy](http://www.pge.com/MyEnergy)

Account No:	12345789-0
Statement Date:	06/07/2017
<b>Due Date:</b>	<b>06/28/2017</b>

**Details of Gas Charges  
NO CHANGE**

**PG&E Gas and Electric  
Advice Filing List  
General Order 96-B, Section IV**

AT&T	Downey & Brand	Pioneer Community Energy
Albion Power Company	Ellison Schneider & Harris LLP	Praxair
Alcantar & Kahl LLP	Energy Management Service	Regulatory & Cogeneration Service, Inc.
Anderson & Poole	Evaluation + Strategy for Social Innovation	SCD Energy Solutions
Atlas ReFuel	GenOn Energy, Inc.	SCE
BART	Goodin, MacBride, Squeri, Schlotz & Ritchie	SDG&E and SoCalGas
Barkovich & Yap, Inc.	Green Charge Networks	SPURR
Braun Blaising Smith Wynne P.C.	Green Power Institute	San Francisco Water Power and Sewer
CalCom Solar	Hanna & Morton	Seattle City Light
California Cotton Ginners & Growers Assn	ICF	Sempra Utilities
California Energy Commission	International Power Technology	Southern California Edison Company
California Public Utilities Commission	Intestate Gas Services, Inc.	Southern California Gas Company
California State Association of Counties	Kelly Group	Spark Energy
Calpine	Ken Bohn Consulting	Sun Light & Power
Casner, Steve	Keyes & Fox LLP	Sunshine Design
Cenergy Power	Leviton Manufacturing Co., Inc.	Tecogen, Inc.
Center for Biological Diversity	Linde	TerraVerde Renewable Partners
City of Palo Alto	Los Angeles County Integrated Waste Management Task Force	Tiger Natural Gas, Inc.
City of San Jose	Los Angeles Dept of Water & Power	TransCanada
Clean Power Research	MRW & Associates	Troutman Sanders LLP
Coast Economic Consulting	Manatt Phelps Phillips	Utility Cost Management
Commercial Energy	Marin Energy Authority	Utility Power Solutions
County of Tehama - Department of Public Works	McKenzie & Associates	Utility Specialists
Crossborder Energy	Modesto Irrigation District	Verizon
Crown Road Energy, LLC	Morgan Stanley	Water and Energy Consulting
Davis Wright Tremaine LLP	NLine Energy, Inc.	Wellhead Electric Company
Day Carter Murphy	NRG Solar	Western Manufactured Housing Communities Association (WMA)
Dept of General Services	Office of Ratepayer Advocates	Yep Energy
Don Pickett & Associates, Inc.	OnGrid Solar	
Douglass & Liddell	Pacific Gas and Electric Company	