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Regulatory Relations

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Fax: 415-973-3582

June 14, 2019

**Advice 5560-E**  
(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

**Subject: Revisions to Electric Rule 22.1, Direct Access Service Switching Exemption Rules, and Rate Schedule CCA-CRS, Community Choice Aggregation Cost Responsibility Surcharge (Interim), in Compliance with D.19-05-043**

Pacific Gas and Electric Company (PG&E) hereby submits revisions to its electric tariffs. The applicable tariff sheets are listed in the enclosed Attachment 1.

### **Purpose**

The purpose of this advice letter is to propose revisions to Electric Rule 22.1, *Direct Access Service Switching Exemption Rules*, and Rate Schedule CCA-CRS, *Community Choice Aggregation Cost Responsibility Surcharge (Interim)*, in compliance with Ordering Paragraphs (OP) 3, 4, 5 and 6 of Decision (D.) 19-05-043.

### **Background**

On March 21, 2019, the California Public Utilities Commission (CPUC or Commission) issued an Order Instituting Rulemaking (R.) 19-03-009, pursuant to Senate Bill (SB) 237,<sup>1</sup> which concerns Direct Access (DA) transactions. In R.19-03-009, Commission Staff proposed to (1) allocate the DA increase of 4,000 gigawatt-hours (gWh) based on the proportion of each respective Investor-Owned Utility's (IOU's) eligible DA load to the statewide total DA load, (2) allow eligible customers who enroll in DA expansion to start service on January 1, 2020, and (3) require that IOUs enroll eligible customers using the DA waitlist that is effective as of January 1, 2019.<sup>2</sup>

On April 9, 2019, the Commission hosted a workshop to discuss the Commission Staff's proposal, including the calculations supporting Commission Staff's methodology

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<sup>1</sup> Stats. 2018, Ch. 600, amending Public Utilities (Pub. Util) Code section 365.1. All further statutory references are to the Pub. Util. §§ unless otherwise specified.

<sup>2</sup> See Order Instituting Rulemaking to Implement SB 237 Related to Direct Access, R.19-03-009 at 9-10 (March 29, 2019).

for apportioning the DA cap increase to the service territories of PG&E, Southern California Edison Company, and San Diego Gas and Electric Company.

On June 3, 2019, the Commission issued Decision (D.) 19-05-043 adopting (1) the Commission Staff's proposal to allocate the DA increase based on the proportion of each respective IOU's eligible DA load to the statewide total DA load, (2) a start date of January 1, 2021 for eligible customers to start service under the DA expansion, (3) a requirement that, out of the 4,000 gWh increase, customers on the 2019 DA waitlist shall be allowed to enroll in 2,000 gWh and customers on the 2020 DA waitlist shall be allowed to enroll in the remaining 2,000 gWh, (4) an enrollment schedule to enroll 2019 and 2020 waitlist customers in the DA expansion, and (5) a requirement that the IOUs provide reports containing historic hourly peak demand and usage data on 2019 and 2020 waitlist customers electing to switch to DA to affected Community Choice Aggregators.

This submittal will not affect any other rates or charges, cause the withdrawal of service, or conflict with any other rate schedule or rule.

### **Tariff Revisions**

PG&E proposes the following revisions in compliance with OP 3, 4, 5 and 6 of D.19-05-043.

1. Electric Rule 22.1, *Direct Access Service Switching Exemption Rules*, has been revised to:
  - a. Remove outdated language regarding customer enrollments under the prior Limited Direct Access Reopening authorized by D.10-03-022 and modified by D. 10-05-039.
  - b. Section C, *Phase In Period*, has been deleted.
  - c. Section D, *Post Phase In Period*, has been renumbered and renamed Section C, *Direct Access Enrollment Process*, and updated to describe the enrollment process after the Limited Expansion Window Period, and the on-going assessment to determine if there is room under the Overall DA Cap. In addition, the timing in Section C.10 has been clarified to state that the monthly determination on whether there is room available under the Overall DA Cap will be made as of the end of the prior month, not on the last business day of the month.
  - d. Added a new Section D, *Direct Access Load Limits*, to describe the increase to the Annual Load Limits on DA load in 2020 and 2021, and to the Overall DA Cap.
  - e. Added a new Section E, *Limited Expansion Window Period*, to describe the enrollment process and schedule to allocate load to customers under the 2020 and 2021 Annual Load Limits. Customers who are offered and accept load space would be allowed to begin enrolling on DA on or after January 1, 2021.

Redline changes to the electric Rule 22.1 are shown in Attachment 2.

2. Electric Rate Schedule CCA-CRS, Community Choice Aggregation Cost Responsibility Surcharge (Interim) has been revised as follows.
  - a. PG&E interprets the discussion in D.19-05-043<sup>3</sup> and Findings of Fact 16<sup>4</sup> as being applicable to Community Choice Aggregation Service customers and has revised Schedule CCA-CRS to add a new Special Condition 5 to clarify that the vintage of a Community Choice Aggregation Service customer does not change when that customer directly enrolls in direct access service. Special Condition 5 reads as follows:

*The vintage of the PCIA applicable to a customer who has continuously been on DA or CCA service and has not returned to PG&E for generation services, except under Transitional Bundled Service (TBS), as prescribed in Rule 22.1, is not affected by changes in electric commodity service provider.*
  - b. Rate Schedule CCA-CRS has been retitled to remove the “interim” designation from the title.

### **Protests**

Anyone wishing to protest this may do so by letter sent via U.S. mail, facsimile or E-mail, no later than July 5, 2019, which is 21 days<sup>5</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>3</sup> Decision 19-05-043, Decision Regarding Increased Limits For Direct Access Transactions, Issued June 3, 2019, pp. 22 - 24

<sup>4</sup> Decision 19-05-043, Decision Regarding Increased Limits For Direct Access Transactions, Issued June 3, 2019, pp. 34

<sup>5</sup> The 20-day protest period concludes on a holiday. PG&E is hereby 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).

### **Effective Date**

Pursuant to General Order (GO) 96-B, Energy Industry Rule 5.1 and OP 3 of D.19-05-043 this Advice Letter is submitted with a Tier 1 designation. PG&E requests that this Tier 1 advice submittal become effective upon date of submittal, which is June 14, 2019.

### **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 R.19-03-009. 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 filings can also be accessed electronically at: <http://www.pge.com/tariffs/>.

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Erik Jacobson  
Director, Regulatory Relations

Attachments

cc: Service List R.19-03-009



# ADVICE LETTER SUMMARY

## ENERGY UTILITY



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

Company name/CPUC Utility No.: Pacific Gas and Electric Company (ID U39E)

Utility type:

- ELC       GAS       WATER  
 PLC       HEAT

Contact Person: Yvonne Yang

Phone #: (415)973-2094

E-mail: PGETariffs@pge.com

E-mail Disposition Notice to: Yvonne.Yang@pge.com

EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 5560-E

Tier Designation: 1

Subject of AL: Revisions to Electric Rule 22.1, Direct Access Service Switching Exemption Rules, and Rate Schedule CCA-CRS, Community Choice Aggregation Cost Responsibility Surcharge (Interim), in Compliance with D.19-05-043

Keywords (choose from CPUC listing): Direct Access

AL Type:  Monthly  Quarterly  Annual  One-Time  Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.19-05-043

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:

Confidential treatment requested?  Yes  No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required?  Yes  No

Requested effective date: 6/14/19

No. of tariff sheets: 19

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: See attachment 1

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

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

<sup>1</sup>Discuss in AL if more space is needed.

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

CPUC, Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102  
Email: [EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

Name: Erik Jacobson, c/o Megan Lawson  
Title: Director, Regulatory Relations  
Utility Name: Pacific Gas and Electric Company  
Address: 77 Beale Street, Mail Code B13U  
City: San Francisco, CA 94177  
State: California Zip: 94177  
Telephone (xxx) xxx-xxxx: (415)973-2093  
Facsimile (xxx) xxx-xxxx: (415)973-3582  
Email: [PGETariffs@pge.com](mailto:PGETariffs@pge.com)

Name:  
Title:  
Utility Name:  
Address:  
City:  
State: District of Columbia Zip:  
Telephone (xxx) xxx-xxxx:  
Facsimile (xxx) xxx-xxxx:  
Email:

Cal P.U.C. Sheet No.	Title of Sheet	Cancelling Cal P.U.C. Sheet No.
44463-E	ELECTRIC SCHEDULE CCA-CRS COMMUNITY CHOICE AGGREGATION COST RESPONSIBILITY SURCHARGE Sheet 2	29285-E
44464-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 1	32720-E
44465-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 3	32405-E
44466-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 4	32406-E**
44467-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 5	32998-E
44468-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 6	29178-E
44469-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 7	37738-E
44470-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 8	37739-E
44471-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 9	32410-E
44472-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 10	
44473-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 11	
44474-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 12	
44475-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 13	

Cal P.U.C. Sheet No.	Title of Sheet	
44476-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 14	
44477-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 15	
44478-E	ELECTRIC RULE NO. 22.1 DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES Sheet 16	
44479-E	ELECTRIC TABLE OF CONTENTS Sheet 1	44456-E
44480-E	ELECTRIC TABLE OF CONTENTS Sheet 8	41779-E
44481-E	ELECTRIC TABLE OF CONTENTS Sheet 20	43948-E



**ELECTRIC SCHEDULE CCA-CRS**

Sheet 2

**COMMUNITY CHOICE AGGREGATION COST RESPONSIBILITY SURCHARGE**

(T)

**SPECIAL CONDITIONS:**

1. California Alternative Rates for Energy (CARE) and medical baseline customers that take CCA service are exempt from paying the DWR Bond Charge. Medical baseline customers are also exempt from the PCIA portion of the CCA CRS.
2. Customers that have taken Direct Access (DA) or CCA service continually since February 1, 2001, are exempt from the DWR Bond Charge and PCIA portions of the CCA CRS.
3. Pursuant to Resolution E-3843, effective December 4, 2003, a customer who was on DA service prior to February 1, 2001, and returned to bundled service after September 20, 2001, shall be exempt from the DWR Bond Charge and the PCIA components of DA CRS if CCA service is elected. These customers are not exempt from the ongoing CTC and regulatory asset, and will be billed for these charges under their otherwise-applicable rate schedule.
4. Should the total indifference amount be less than zero, the negative indifference amount will be used to offset future positive indifference amounts after September 1, 2006. The resulting CRS will not be negative, will not result in any net payment to customers who leave utility service, and will not be applied against other non-bypassable charges. Modifications to these charges will not affect other non-bypassable charges.
5. The vintage of the PCIA applicable to a customer who has continuously been on DA or CCA service and has not returned to PG&E for generation services, except under Transitional Bundled Service (TBS), as prescribed in Rule 22.1, is not affected by changes in electric commodity service provider.

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(N)



**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 1

The following terms and conditions apply to both PG&E customers and electric service providers (ESPs) who participate in Direct Access (DA) as defined in Rule 22.

The following rules implement the Switching Exemption Decision (D.) 03-05-034, which adopted guidelines regarding the rights and obligations of DA customers who return to Bundled Service and subsequently switch back to DA service, Decision Regarding Increased Limits For Direct Access Transactions D.10-03-022 and D.19-05-043, which adopted guidelines regarding the rights and obligations of non-residential bundled service customers to switch to DA service, D.11-12-018, which reduced the minimum commitment on Bundled Portfolio Service from three (3) years to eighteen (18) months and D.12-12-026, which adopted a lottery process in lieu of a first-come/first-served process. D.03-05-034, D.10-03-022, D.11-12-018, D.12-12-026 and D.19-05-043 established provisions for eligible DA customers regarding: (1) Transitional Bundled Service; (2) Bundled Portfolio Service; (3) Direct Access Load Limits, (4) Limited Expansion Window Period Enrollments and (5) Enrollments Beyond the Limited Expansion Window Period. Pursuant to D.05-12-041, customers receiving Direct Access Service, Transitional Bundled Service or Bundled Portfolio Service may be automatically enrolled in a Community Choice Aggregation Program as described in Rule 23. (T) (T) (N) (N)

Effective March 11, 2010, the right to transfer to Direct Access service is closed to residential customers. (D) | (D)

Customers switching to or from bundled service or Community Choice Aggregation Service (CCA Service) (with the exception of Transitional Bundled Service described in Section A of this Rule) shall notify PG&E six (6) months in advance of their intent to switch to DA service. (T) (T) (T)

**A. Transitional Bundled Service**

1. Transitional Bundled Service (TBS) is effective February 19, 2004, and allows DA customers to return to Bundled Service on a transitional basis while switching from one ESP to another, or for similar or related reasons where TBS is needed in this Rule or Rule 22, Section Q.
2. The TBS provision is limited to a sixty (60) day period. The sixty (60) day period begins on the day the DA service is disconnected, which is the day PG&E starts supplying power to the service account (Day 1). By no later than the end of the sixty (60) day period (Day 60 of PG&E supplying power), PG&E must be in receipt of a Direct Access Service Request (DASR) from the customer's new ESP to switch the service account to DA service. In addition to meeting the DASR provisions set forth in Rule 22, Section E, DASRs to switch the service account back to DA service must comply with the following special conditions:

(Continued)

Advice	5560-E	Issued by	Submitted	June 14, 2019
Decision	19-05-043	<b>Robert S. Kenney</b>	Effective	June 14, 2019
		Vice President, Regulatory Affairs	Resolution	



**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 3

A. Transitional Bundled Service (Cont'd.)

- 5. DA customers electing the TBS option may continue to use the same meter provided it is compatible with the PG&E's meter reading system. Incompatible meters will be replaced by PG&E with a meter that meets the customer's applicable tariff requirements, unless PG&E has the capability to do a special read for a fee or the customer and PG&E can agree on an alternative arrangement. Special metering requirements while receiving TBS will be subject to costs as set forth in rate Schedules E-ESP and E-EUS.
- 6. Customers returning to DA service at the conclusion of their TBS term will retain their continuous DA status associated with rate Schedule DA-CRS, if applicable.

B. Bundled Portfolio Service

- 1. This service option is effective February 19, 2004, and is applicable to all customers who return to Bundled Service for a minimum of eighteen (18) months. This eighteen (18) month minimum Bundled Service commitment will be referred to herein as PG&E's Bundled Portfolio Service (BPS). The following conditions will apply: (T)
  - a. Customers electing this service make a eighteen (18) month commitment and will not be allowed to return to DA service until their eighteen (18) month minimum period has been completed. The eighteen (18) month minimum period will begin on the date the customer is switched to BPS after the conclusion of the six (6) month advance notice period as set forth in Section B.1.b of this tariff. No premature departures from the eighteen (18) month commitment will be allowed. (D)
  - b. Customers must provide a six (6) month advance notice to PG&E prior to becoming eligible for BPS so PG&E can adjust its procurement activity to accommodate the additional load. Such notification will be made by the customer submitting the Notice to Return to PG&E Bundled Service form (Form No. 79-1011) in writing or electronically. PG&E will provide the customer with written confirmation and the necessary switching process information within ten (10) days of receipt of the customer's notification. Once received by PG&E, customers will have a three (3) business day rescission period after which advance notifications cannot be canceled. PG&E will process requests to receive BPS in the following manner:

(Continued)

Advice	5560-E	Issued by	Submitted	June 14, 2019
Decision	19-05-043	<b>Robert S. Kenney</b>	Effective	June 14, 2019
		Vice President, Regulatory Affairs	Resolution	



**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 4

B. Bundled Portfolio Service (Cont'd.)

1. (Cont'd.)

- 1) Service account transfers to BPS will be switched on the customer's next scheduled meter read date after the completion of the six (6) month advance notice period. For service accounts with meters that are incompatible with PG&E's meter reading system, PG&E will replace the incompatible meter with a meter that is acceptable to PG&E. Such metering service will be done in accordance with rate Schedule E-EUS.
- 2) PG&E will initiate a DASR to transfer the service account to BPS and will provide notification to the customer and ESP in accordance with Rule 22, Section E.7.

c. During the six (6) month advance notice period, but before they become eligible for BPS, customers may either continue on DA Service, switch to CCA service, if applicable, or return to Bundled Service and receive TBS pricing as set forth in Section A.4 of this tariff. PG&E will process any DASR returning the customer to Bundled Service during the six (6) month advance notice period in accordance with Rule 22, Section E, and will provide Bundled Service to the customer at the TBS rate for the remainder, if any, of the six (6) month advance notice period. PG&E will initiate the necessary transfer of the service account to BPS at the conclusion of the six (6) month advance notice period with notification to the customer. The metering requirements of Section B.1.b(1) above, will apply during the six (6) month advance notice period. Customers returning to Bundled Service during the six (6) month advance notice period (i.e., before the commencement of BPS), cannot return to DA service.

(T)  
(T)

d. Customers returning to DA service at the conclusion of their BPS term will retain their continuous DA status associated with rate Schedule DA-CRS, if applicable.

(Continued)

Advice 5560-E  
Decision 19-05-043

Issued by  
**Robert S. Kenney**  
Vice President, Regulatory Affairs

Submitted	June 14, 2019
Effective	June 14, 2019
Resolution	



**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 5

B. Bundled Portfolio Service (Cont'd.)

2. At the end of a customer's eighteen (18) month BPS commitment, the customer may have the option to transfer to DA service under the provisions of Section B.2 of this rule or remain on Bundled Service. (T)

(D)  
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(D)

a. Subject to the DA load limitations set forth in Section C, customers may elect to switch to DA service at any time subsequent to the conclusion of the eighteen (18) month BPS commitment period with the required six (6) month advance notice. Customers must provide PG&E a six (6) month advance notice prior to becoming eligible for DA service so PG&E can adjust its procurement activity to accommodate the change in load. Such notification will be made by the customer submitting a Six Month Notice To Transfer To Direct Access Service form (Form No. 79-1117) as specified on PG&E's website. Only one six-month notice can be submitted per submission method (e.g. email); otherwise, the entire submission will be rejected and each six-month notice will need to be resubmitted on a separate six month notice. If any service accounts on a six-month notice do not belong to the customer indicated on the six-month notice, such service accounts will be rejected and will need to be resubmitted on a separate six- month notice. Each six-month notice received by PG&E will be time and date stamped by PG&E to determine precedence. Once received by PG&E, customers will have a three (3) business day rescission period after which advance notifications cannot be canceled. PG&E will provide to the customer a written confirmation and necessary switching process information within thirty (30) business days of the customer's notification, including the final date for PG&E to be in receipt of a DASR to return to DA Service. The customer is responsible for providing its ESP with this information. (T)

(Continued)



**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 6

B. Bundled Portfolio Service (Cont'd.)

2. (Cont'd.)

a. (Cont'd.)

1) The customer's ESP shall submit a DASR to ensure that the necessary switch to DA service under the DA switching rules occurs on the service account's next scheduled meter read date after the completion of the six (6) month advance notice period. Meter changes must be completed in accordance with Section A.2.c. of this tariff.

2) If PG&E is not in receipt of a DASR by the final date specified in the utility's confirmation of receipt of the customer's six-month notice, the customer's account will be transferred to TBS. The customer will be subject to the terms of Section A above. If PG&E has not received a DASR by the end of the 60-day TBS, then the customer's six-month notice to return to DA shall be cancelled, and that cancellation shall serve as the customer's six-month notice to return to bundled service provided under the existing rules. The customer continues to be subject to Section A until the end of the six months. The customer shall also be treated as any other customer returning to bundled from DA service. That is, the eighteen (18) month BPS commitment period requirement shall apply. (T)

b. Customers electing to remain on Bundled Service are not required to take any action.

3. Effective March 11, 2010, the right to transfer to Direct Access service is closed to residential customers. If a residential DA customer returns to Bundled Portfolio Service, the customer shall not be permitted to switch back to DA service. (D)

(Continued)





**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 8

C. Direct Access Enrollment Process (Cont'd.)

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(L)

2. Upon PG&E's receipt of each Six-Month Notice, PG&E will send an automatic receipt via email, addressed to the party from whom the notice was received, acknowledging that the Notice was received. The purpose of this email shall be just to confirm that the submission was received. It shall neither confer any priority, nor impact the lottery process.
3. Any duplicate Six-Month Notices covering the same service accounts will be discarded. If more than one Six-Month Notice is received for a service account, only one will be confirmed; all others will be ineligible. For any Six-Month Notice that PG&E determines to be ineligible, it will send via e-mail a notice to the party from whom the Six-Month Notice was received that it has been determined to be ineligible. If the party believes that PG&E's determination of ineligibility is in error, the party will have five (5) business days to dispute PG&E's determination, upon which PG&E will review its determination and advise the submitter of the information required to resolve the dispute.
4. PG&E to review/audit/confirm Six-Month Notices within thirty (30) business days following close of the Submission Period.
5. During the review and audit process, a Six-Month Notice that is found to have a deficiency (e.g., incorrect service account number) may be accepted on the condition that it is corrected by the customer within five (5) business days after PG&E notifies the customer of such deficiency. Six-Month Notices will be void in the event a deficiency in a Six-Month Notice is not corrected by the customer within five (5) business days, but only as to the service account(s) for which there was an uncorrected deficiency.
6. Six-Month Notices will be accepted subject to all deficiencies being resolved and availability of space under the established Overall DA Cap. By the thirtieth (30<sup>th</sup>) business day of the review period, PG&E will run the "randomizer" tool (Microsoft Access or some other tool agreed-upon by all parties) to assign a random number to each customer submission.
7. The Six-Month Notices will be ordered in sequence by their randomly assigned number and accepted subject to the established Overall DA Cap. Remaining Six-Month Notices will be placed on a wait list (Wait List) in the order assigned by the randomizer, and will be maintained on that Wait List for the subsequent calendar year.

(L)

(Continued)

Advice	5560-E	Issued by	Submitted	June 14, 2019
Decision	19-05-043	<b>Robert S. Kenney</b>	Effective	June 14, 2019
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**ELECTRIC RULE NO. 22.1**

Sheet 9

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

C. Direct Access Enrollment Process (Cont'd.)

- 8. Within ten (10) business days, following the thirty (30) business day review period, customers will receive email notification that their Six-Month Notice has been accepted or placed on the Wait List along with their initial sequence number, based upon the random "lottery" number.
- 9. All Six-Month Notices on the Wait List on the last business day of each calendar year will be cancelled and superseded by the following year's Wait List.
- 10. On a monthly basis, PG&E will determine if there is room under the Overall DA Cap for the prior month and notify the first customer on the Wait List that there is available space under the Overall DA Cap:
  - a. If the available space under the Overall DA Cap is sufficient to accommodate all of the customer's Wait-Listed service accounts, PG&E will notify the customer of the DASR Due Date for each accepted service account at least forty-five (45) days in advance of the customer's earliest possible switch date. During this process, a Six-Month Notice that is found to have a deficiency (e.g., incorrect service account number) may be accepted on the condition that it is corrected by the customer within five (5) business days after PG&E notifies the customer of such deficiency. Six-Month Notices will be void in the event a deficiency in a Six-Month Notice is not corrected by the customer within five (5) business days, but only as to the service account(s) for which there was an uncorrected deficiency. Customers will have fifteen (15) business days either to accept or decline the space offered, without penalty. Should the customer decline the space offered, the customer is removed from that year's Wait List and remains on utility bundled service. PG&E will then notify the next customer on the Wait List.
  - b. If the available space under the Overall DA Cap is not sufficient to accommodate all of the customer's service accounts on the Wait List, PG&E will notify the customer at least forty-five (45) days in advance of the customer's earliest possible switch date of the eligible service account(s) and will work with the customer to determine the service accounts to be switched. The remaining service accounts, if any, on the customer's list will remain on the Wait List. Customers will have fifteen (15) business days either to accept or decline the space offered, without penalty. Should the customer decline to accept the space offered, the customer is removed from that year's Wait List and remains on utility bundled service.
  - c. Should a customer accept the offer and fail to submit a DASR by the DASR Due Date, the customer's service account(s) will be switched to Transitional Bundled Service and be subject to the then current Switching Exemption Rules.

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**ELECTRIC RULE NO. 22.1**

Sheet 11

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

E. Limited Expansion Window Period

(N)

The following describes the Direct Access enrollment process during the Limited Expansion Window Period.

For customers who are offered and accept load space under the Limited Expansion Window Period enrollment process, if a customer fails to submit a Direct Access Service Request by the DASR Due Date, the provisions regarding the sixty (60) day Transitional Bundled Service period, six month Transitional Commodity pricing period, and an eighteen (18) month commitment period on bundled portfolio service as prescribed on the Six Month Notice will not apply.

1. Enrollments Under the 2020 Annual Limit

a. Pursuant to D.19-05-043, only customers who had participated in the 2018 Submission Period, as described in Section C, above, and were placed on the Wait List that is effective for 2019 (2019 Wait List) will be offered an opportunity to enroll on DA under the 2020 Annual Limit.

b. By August 12, 2019, PG&E will determine if there is room under the 2020 Annual Load Limit and notify the customers on the 2019 Wait List based on the availability under the 2020 Annual Load Limit:

(1) PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. Customers will have until 5:00 PM on September 3, 2019 to either to accept or decline the space offered. Should the customer decline the space offered or fail to respond timely, the customer is removed from the 2019 Wait List and will remain on utility Bundled Service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer(s) on the 2019 Wait List and direct these customers to submit their decisions regarding DA service to PG&E on or before September 3, 2019, at 5:00 p.m.

(2) If the available space under the 2020 Annual Load Limit is not sufficient to accommodate all of the customer's service accounts on the 2019 Wait List, PG&E will notify the customer of the DASR Due Date of February 3, 2020 and that the earliest possible switch date will be on or after January 1, 2021, and work with the customer to determine the service accounts to be switched. The remaining service accounts, if any, on the customer's list will remain on the 2019 Wait List. Customers will have until 5:00 PM on September 3, 2019 to accept or decline the space offered. Should the customer decline to accept the space offered, the customer is removed from 2019 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable.

(N)

(Continued)

Advice 5560-E  
Decision 19-05-043

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**Robert S. Kenney**  
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**ELECTRIC RULE NO. 22.1**

Sheet 12

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

E. Limited Expansion Window Period

(N)

1. Enrollments Under the 2020 Annual Limit (Cont'd.)

b. (Cont'd.)

- (3) Should a customer accept the space offered and later decide not to pursue DA, it must notify PG&E of its decision to decline the space offered.
  - (i) If the customer notifies PG&E prior to December 31, 2019 at 11:59 p.m., then PG&E will reallocate the load space to the next customer on the 2019 Wait List. PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. If the available space is not sufficient to accommodate all of the customer's service accounts on the 2019 Wait List, PG&E will work with the customer to determine which service accounts to be switched. Customers will have fifteen (15) business days to either accept or decline the space offered. Should the customer decline to accept the space offered, the customer is removed from 2019 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer on the 2019 Wait List.
  - (ii) If the customer notifies PG&E after December 31, 2019 at 11:59 p.m., then PG&E will reallocate the load space to the next customer on the 2020 Wait List. PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. If the available space is not sufficient to accommodate all of the customer's service accounts on the 2020 Wait List, PG&E will work with the customer to determine which service accounts to be switched. Customers will have fifteen (15) business days to either accept or decline the space offered. Should the customer decline to accept the space offered, the customer is removed from 2020 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer on the 2020 Wait List.
- (4) Should a customer accept the offer and fail to submit a DASR by the DASR Due Date of February 3, 2020, the customer's service account(s) will remain on utility Bundled Service or Community Choice Aggregation Service, if applicable.
- (5) No space will be offered to customers on the 2019 Wait List or 2020 Wait List after February 3, 2020, or when all of the available space under the 2020 Annual Load Limit has been allocated, whichever occurs first. Any load space under the 2020 Annual Limit that is unallocated, declined or unclaimed timely by the 2019 Wait List or 2020 Wait List customers will be reallocated to customer enrollments under the Overall DA Cap in the following year, as described in Section C, above.

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Advice	5560-E	Issued by	Submitted	June 14, 2019
Decision	19-05-043	<b>Robert S. Kenney</b>	Effective	June 14, 2019
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**ELECTRIC RULE NO. 22.1**

Sheet 13

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

E. Limited Expansion Window Period (Cont'd.)

(N)

2. Enrollments Under the 2020 Annual Limit

a. DA customers or their authorized agent may submit Six-Month Notices via e mail or an online IOU form during a prescribed five (5) business day window (Submission Period) for space under the established Overall DA Cap that may become available during calendar year 2021. The Submission Period will begin on Monday, June 10, 2019, at 9:00 a.m. PDT and end on Friday, June 14, 2019, at 5:00 p.m. PDT. Six-Month Notices received prior to 9:00 a.m. PDT Monday or after 5:00 p.m. PDT Friday will be rejected. Submissions must be made by or on behalf of an individual customer and shall include the following information:

- (1) Customer Name, Six-Month Notice, Submitter Name, and number of service Accounts being submitted.
- (2) A completed Six-Month Notice may cover multiple service accounts but they must all be for the same customer, under that customer's Federal Taxpayer Identification (FTI) or other PG&E customer identifiers. A Six-Month Notice found to include multiple FTI numbers or other incomplete information may be considered to have a deficiency. Upon e-mail notification from PG&E of such deficiency, customers or their authorized agent shall have five (5) business days to correct the deficient Six-Month Notice.
- (3) Any duplicate Six-Month Notices covering the same service accounts will be discarded. If more than one Six-Month Notice is received for a service account, only one will be confirmed; all others will be ineligible. For any Six-Month Notice that PG&E determines to be ineligible, it will send via e-mail a notice to the party from whom the Six-Month Notice was received that it has been determined to be ineligible. If the party believes that PG&E's determination of ineligibility is in error, the party will have five (5) business days to dispute the PG&E's determination, upon which PG&E will review its determination and advise the submitter of the information required to resolve the dispute.

b. A prioritized list of the submitted service accounts (in the event the available space under the established Overall DA Cap cannot accommodate the entire list).

c. Upon PG&E's receipt of each Six-Month Notice, PG&E will send an automatic receipt via e-mail, addressed to the party, from whom the notice was received, acknowledging that the Notice was received. The purpose of this e mail shall be just to confirm that the submission was received. It shall neither confer any priority, nor impact the lottery process.

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(Continued)

<i>Advice</i>	5560-E	<i>Issued by</i>	<i>Submitted</i>	June 14, 2019
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**ELECTRIC RULE NO. 22.1**

Sheet 14

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

E. Limited Expansion Window Period

(N)

2. Enrollments Under the 2020 Annual Limit (Cont'd.)

- d. PG&E to review/audit/confirm Six-Month Notices within thirty (30) business days following the close of the Submission Period.
  - e. During the review and audit process, a Six-Month Notice that is found to have a deficiency (e.g., incorrect service account number) may be accepted on the condition that it is corrected by the customer within five (5) business days after PG&E notifies the customer of such deficiency. Six-Month Notices will be void in the event a deficiency in a Six-Month Notice is not corrected by the customer within five (5) business days, but only as to the service account(s) for which there was an uncorrected deficiency.
  - f. Six-Month Notices will be accepted subject to all deficiencies being resolved and availability of space under the established 2021 Annual Limit. By the thirtieth (30th) business day of the review period, PG&E will run the "randomizer" tool (Microsoft Access or some other tool agreed-upon by all parties) to assign a random number to each customer submission.
  - g. The Six-Month Notices will be ordered in sequence by their randomly assigned number and accepted subject to the established Overall DA Load Limit. Remaining Six Month Notices will be placed on a wait list (Wait List) in the order assigned by the randomizer, and will be maintained on that Wait List for the subsequent calendar year.
  - h. By August 12, 2019, customers will receive e-mail notification that their Six-Month Notice has been accepted or placed on the Wait List along with their initial sequence number, based upon the random "lottery" number.
- (1) If the available space under the 2021 Annual Limit is sufficient to accommodate all of the customer's Wait-Listed service accounts, PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. During this process, a Six-Month Notice that is found to have a deficiency (e.g., incorrect service account number) may be accepted on the condition that it is corrected by the customer within five (5) business days after PG&E notifies the customer of such deficiency. Six-Month Notices will be void in the event a deficiency in a Six-Month Notice is not corrected by the customer within five (5) business days, but only as to the service account(s) for which there was an uncorrected deficiency. Customers will have until September 3, 2019 to either to accept or decline the space offered, without penalty. Should the customer decline the space offered or fails to respond timely, the customer is removed from the 2020 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer on the 2020 Wait List and direct these customers to submit their decisions regarding DA service to the PG&E on or before September 6, 2019, at 5:00 p.m. within fifteen (15) business days.

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Advice	5560-E	Issued by	Submitted	June 14, 2019
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**ELECTRIC RULE NO. 22.1**

Sheet 15

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

E. Limited Expansion Window Period

(N)

2. Enrollments Under the 2020 Annual Limit (Cont'd.)

h. (Cont'd.)

- (2) If the available space under the 2021 Annual Limit is not sufficient to accommodate all of the customer's service accounts on the Wait List, PG&E will notify the customer of the DASR Due Date of February 3, 2020 and that the earliest possible switch date will be on or after January 1, 2021, and will work with the customer to determine the service accounts to be switched. The remaining service accounts, if any, on the customer's list will remain on the Wait List. Customers will have until September 3, 2019 to accept or decline the space offered, without penalty. Should the customer decline to accept the space offered or fails to respond timely, the customer is removed from that year's Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable.
- (3) Should a customer accept the space offered and later decide not to pursue DA, it must notify PG&E of its decision to decline the space offered. If the customer notifies PG&E prior to February 3, 2020, PG&E will reallocate the load space to the next customer on the 2020 Wait List. PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. If the available space is not sufficient to accommodate all of the customer's service accounts on the 2020 Wait List, PG&E will work with the customer to determine which service accounts to be switched. Customers will have fifteen (15) business days to either accept or decline the space offered. Should the customer decline to accept the space offered, the customer is removed from 2020 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer on the 2020 Wait List.
- (4) Should a customer accept the offer and fail to submit a DASR by the DASR Due Date of February 3, 2020, the customer's service account(s) will remain on utility Bundled Service or Community Choice Aggregation Service, if applicable.
- (5) No space will be offered to customers on the 2020 Wait List after February 3, 2020, or when all of the available space under the Overall DA Cap has been allocated, whichever occurs first. Any load space under the 2020 Annual Limit that is unallocated, declined or unclaimed timely by the 2020 Wait List customers will be reallocated to customer enrollments under the Overall DA Cap in the following year, as described in Section C, above.

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June 14, 2019  
June 14, 2019







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Advice 5560-E  
June 14, 2019

**Attachment 2**  
**Redlined Tariffs**





**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 1

The following terms and conditions apply to both PG&E customers and electric service providers (ESPs) who participate in Direct Access (DA) as defined in Rule 22.

The following rules implement the Switching Exemption Decision (D.) 03-05-034, which adopted guidelines regarding the rights and obligations of DA customers who return to Bundled Service and subsequently switch back to DA service, Decision Regarding Increased Limits For Direct Access Transactions D.10-03-022 and D.19-05-043, which adopted guidelines regarding the rights and obligations of non-residential bundled service customers to switch to DA service, D.11-12-018, which reduced the minimum commitment on Bundled Portfolio Service from three (3) years to eighteen (18) months and D.12-12-026, which adopted a lottery process in lieu of a first-come/first-served process. D.03-05-034, D.10-03-022, D.11-12-018, and D.12-12-026 and D.19-05-043 established provisions for eligible DA customers regarding: (1) Transitional Bundled Service; (2) Bundled Portfolio Service; (3) Direct Access Load Limits, Phase-In (4) Limited Expansion Window Period Enrollments and (45) Enrollments Beyond the Limited Expansion Window Post-Phase-In Period. Pursuant to D.05-12-041, customers receiving Direct Access Service, Transitional Bundled Service or Bundled Portfolio Service may be automatically enrolled in a Community Choice Aggregation Program as described in Rule 23.

Effective March 11, 2010, the right to transfer to Direct Access service is closed to residential customers. ~~However, a residential customer previously classified as DA-eligible that submitted a six-month notice to transfer to DA service prior to March 11, 2010, retains a one-time right to transfer to DA service pursuant to D.10-03-022 and the conditions set forth in Section B, below.~~

Customers switching to or from bundled service or Community Choice Aggregation Service (CCA Service) (with the exception of Transitional Bundled Service described in Section A of this Rule) shall notify PG&E six (6) months in advance of their intent to switch to DA service.

**A. Transitional Bundled Service**

1. Transitional Bundled Service (TBS) is effective February 19, 2004, and allows DA customers to return to Bundled Service on a transitional basis while switching from one ESP to another, or for similar or related reasons where TBS is needed in this Rule or Rule 22, Section Q. (N)
2. The TBS provision is limited to a sixty (60) day period. The sixty (60) day period begins on the day the DA service is disconnected, which is the day PG&E starts supplying power to the service account (Day 1). By no later than the end of the sixty (60) day period (Day 60 of PG&E supplying power), PG&E must be in receipt of a Direct Access Service Request (DASR) from the customer's new ESP to switch the service account to DA service. In addition to meeting the DASR provisions set forth in Rule 22, Section E, DASRs to switch the service account back to DA service must comply with the following special conditions:

(Continued)

<i>Advice Decision</i>	4229-E 13-01-021, 13-02-017, 13-04-001	<i>Issued by</i> <b>Brian K. Cherry</b> Vice President Regulatory Relations	<i>Date Filed</i> <i>Effective</i> <i>Resolution</i>	May 24, 2013 March 22, 2014
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**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 2

A. Transitional Bundled Service (Cont'd.)

2. (Cont'd.)

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a. Accepted DASRs that do not require a meter change will be processed based on normal DADR processing timeframes as defined in Rule 22, Section E. PG&E will include the TBS requirements with the DADR status notification that is sent to the customer as provided for in Rule 22, Section E.7. The customer is responsible for providing its new ESP with this information.

b. Rejected DASRs must be corrected and resubmitted by the ESP and be acceptable to PG&E no later than twenty (20) days following the conclusion of the TBS period (Day 80 of PG&E supplying power). DASRs not corrected by the ESP within this time period will be cancelled by PG&E.

c. For accepted DASRs that require a meter change, the meter change must be completed no later than sixty (60) days following the conclusion of the TBS period, or the corrected DADR timing established in Section A.2.b. If a meter change is not completed within sixty (60) days, PG&E will switch the service account to DA service on the customer's next scheduled meter read date with notification to the ESP and customer at the conclusion of the sixty (60) day period. If special metering services are required, such metering services will be done in accordance with rate Schedules E-ESP and E-EUS.

3. Services accounts failing to meet the time limitations and DADR requirements as set forth in Section A.2, above will be in default of the TBS provisions and returned to Bundled Portfolio Service for a eighteen (18) month minimum period, subject to the conditions set forth in Section B of this tariff. Such a default initiates the six (6) month notice of return to Bundled Portfolio Service, which is not subject to cancellation. During this six (6) month period, the service account will be subject to the pricing conditions established in Section A.4, below. PG&E will notify the customer within ten (10) business days of the default, providing an explanation of the default situation, actions being taken and the customer's new Bundled Portfolio Service requirements.

4. Customers electing the TBS option will: (1) be subject to Transitional Bundled Commodity pricing, as defined in rate Schedule TBCC; (2) be subject to the provisions and applicable charges of the Direct Access Cost Responsibility Surcharge (DA CRS) as defined in rate Schedule DA-CRS; and (3) be ineligible to receive Revenue Cycle Services Credits as defined in rate Schedule E-CREDIT.

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(Continued)

Advice 4178-E  
Decision 12-12-026

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**Brian K. Cherry**  
Vice President  
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Date Filed January 18, 2013  
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Resolution





**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 4

B. Bundled Portfolio Service (Cont'd.)

(L)

1. (Cont'd.)

- 1) Service account transfers to BPS will be switched on the customer's next scheduled meter read date after the completion of the six (6) month advance notice period. For service accounts with meters that are incompatible with PG&E's meter reading system, PG&E will replace the incompatible meter with a meter that is acceptable to PG&E. Such metering service will be done in accordance with rate Schedule E-EUS.
- 2) PG&E will initiate a DASR to transfer the service account to BPS and will provide notification to the customer and ESP in accordance with Rule 22, Section E.7.

c. During the six (6) month advance notice period, but before they become eligible for BPS, customers may either continue on DA Service, switch to CCA service, if applicable, or return to Bundled Service and receive TBS pricing as set forth in Section A.4 of this tariff. PG&E will process any DASR returning the customer to Bundled Service during the six (6) month advance notice period in accordance with Rule 22, Section E, and will provide Bundled Service to the customer at the TBS rate for the remainder, if any, of the six (6) month advance notice period. PG&E will initiate the necessary transfer of the service account to BPS at the conclusion of the six (6) month advance notice period with notification to the customer. The metering requirements of Section B.1.b(1) above, will apply during the six (6) month advance notice period. Customers returning to Bundled Service during the six (6) month advance notice period (i.e., before the commencement of BPS), cannot return to DA service.

d. Customers returning to DA service at the conclusion of their BPS term will retain their continuous DA status associated with rate Schedule DA-CRS, if applicable.

(D)  
(L) (D)

(Continued)

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**ELECTRIC RULE NO. 22.1**

Sheet 5

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

B. Bundled Portfolio Service (Cont'd.)

2. At the end of a ~~DA-eligible~~ customer's eighteen (18) month BPS commitment, the customer may have the option to transfer to DA service under the provisions of Section B.2 of this rule or remain on Bundled Service. ~~Between April 16, 2010 and July 15, 2010, all DA-eligible non-residential customers may have an opportunity to transfer their service account(s) to DA service under the provisions of Section C, below, or remain on Bundled Service. PG&E will provide the customer with a courtesy reminder eight (8) months before the expiration of the customer's eighteen (18) month commitment. If for any reason the customer is not sent, or does not receive, a courtesy reminder from PG&E, customer is not relieved of its responsibility for providing PG&E the notice required in Section B.2.a. below.~~

a. Subject to the DA load limitations set forth in Section C, **DA-eligible** customers may elect to switch to DA service at any time subsequent to the conclusion of the eighteen (18) month BPS commitment period with the required six (6) month advance notice. Customers must provide PG&E a six (6) month advance notice prior to becoming eligible for DA service so PG&E can adjust its procurement activity to accommodate the change in load. Such notification will be made by the customer submitting a Six Month Notice To Transfer To Direct Access Service form (Form No. 79-1117) as specified on PG&E's website. Only one six-month notice can be submitted per submission method (e.g. email); otherwise, the entire submission will be rejected and each six-month notice will need to be resubmitted on a separate six month notice. If any service accounts on a six-month notice do not belong to the customer indicated on the six-month notice, such service accounts will be rejected and will need to be resubmitted on a separate six-month notice. Each six-month notice received by PG&E will be time and date stamped by PG&E to determine precedence. Once received by PG&E, customers will have a three (3) business day rescission period after which advance notifications cannot be canceled. PG&E will provide to the customer a written confirmation and necessary switching process information within thirty (30) business days of the customer's notification, including the final date for PG&E to be in receipt of a DASR to return to DA Service. The customer is responsible for providing its ESP with this information.

(T)

(Continued)



**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 6

B. Bundled Service (Cont'd.)

2. (Cont'd.)

a. (Cont'd.)

1) The customer's ESP shall submit a DASR to ensure that the necessary switch to DA service under the DA switching rules occurs on the service account's next scheduled meter read date after the completion of the six (6) month advance notice period. Meter changes must be completed in accordance with Section A.2.c. of this tariff.

2) If PG&E is not in receipt of a DASR by the final date specified in the utility's confirmation of receipt of the customer's six-month notice, the customer's account will be transferred to TBS. The customer will be subject to the terms of Section A above. If PG&E has not received a DASR by the end of the 60-day TBS, then the customer's six-month notice to return to DA shall be cancelled, and that cancellation shall serve as the customer's six-month notice to return to bundled service provided under the existing rules. The customer continues to be subject to Section A until the end of the six months. The customer shall also be treated as any other customer returning to bundled from DA service. That is, the ~~three-year~~ eighteen (18) month BPS commitment period requirement shall apply.

(T)  
(D)  
(T)

b. Customers electing to remain on Bundled Service are not required to take any action.

(D)  
(N)

3. Effective March 11, 2010, the right to transfer to Direct Access service is closed to residential customers. ~~However, a residential customer previously classified as DA-eligible that submitted a six-month notice to transfer to DA service prior to March 11, 2010, retains a one-time right to transfer to DA service pursuant to D.10-03-022 and the conditions set forth in Section B.~~ If a residential DA customer returns to Bundled Portfolio Service, the customer shall not be permitted to switch back to DA service.

—  
—  
—  
(N)

(Continued)



**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 7

~~C. Phase In Period (Cont'd.)~~

~~1. Section C is applicable during the Phase in Period described in Section C.2, below.~~

~~Section C is not applicable to eligible non-residential BPS customers who have submitted a Six Month Notice To Transfer To Direct Access Service form prior to April 11, 2010 and are pending a return to DA service under the provisions of Section B.2, above.~~

~~2. The Phase in Period will begin on April 11, 2010 and continue for four (4) calendar years with the annual limits on DA load increases over the Phase in Period as described below, up to the maximum DA cap of nine thousand five hundred twenty (9,520) gigawatt hours (GWh) established for PG&E's service territory (Overall DA Cap) as defined per D. 10-03-022 (Appendix 1 as "Load Cap"). Kilowatt hours (kWh) remaining under the annual load limit in one year will be rolled over to subsequent years as part of the cumulative increasing annual limits during the phase-in period. Pursuant to D. 10-03-022, the Existing Base Line DA Load is 5,574 GWh, the New DA Load Allowance is 3,946 GWh and the annual GWh limits are set based upon a percentage of the New DA Load Allowance over the Existing Base Line DA, as defined in Appendix 1 of D. 10-03-022, as follows:~~

(T)

~~a. 2010 Annual Limit — thirty five (35) percent of the New DA Load Allowance; the 2010 Load Cap; 6,955 GWh; [5,574 GWh + (0.35 \* 3,946 GWh)]~~

~~b. 2011 Annual Limit — An additional thirty five (35) percent of the New DA Load Allowance for seventy (70) percent of the total New DA Load Allowance; The 2011 Load Cap; 8,336 GWh; [6,955 GWh + (0.35 \* 3,946 GWh)]~~

~~c. 2012 Annual Limit — An additional twenty (20) percent of the New DA Load Allowance for ninety (90) percent of the total New DA Load Allowance The 2012 Load Cap; 9,125 GWh; [8,336 GWh + (0.20 \* 3,946 GWh)].~~

~~d. 2013 Annual Limit — An additional ten (10) percent of the New DA Load Allowance for one hundred (100) percent of the room under the Overall DA Cap; The 2013 Load Cap; 9,520 GWh [9,125 GWh + (0.10 \* 3,946 GWh)].~~

(Continued)

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**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 8

~~G.—Phase In Period (Cont'd.)~~

~~3.—PG&E will notify all DA-eligible customers by means of a bill insert or a bill onsert (a message printed on the customer's bill), as early as March 2010. Customers may visit PG&E's website for details on the terms and conditions for participation in the limited reopening of DA service under D.10-03-022. However, if for any reason the customer is not sent, or does not receive, notification from PG&E, as required in Section C.4, the customer is not relieved of its responsibility for providing PG&E the Notice Of Intent To Transfer To Direct Access Service During The Open Enrollment Window (Form 79-1115) required in Section C.4 below.~~

~~4.—Enrollments During The Open Enrollment Window~~

~~During the Open Enrollment Window (OEW) that will begin on April 16, 2010 at 9:00 a.m. PDT and end at 11:59 p.m. PDT on July 15, 2010, interested DA-eligible customers can submit an NOI to transfer service accounts to DA service..~~

(T)

~~a.—All Load Serving Entities (LSEs), whether they are currently serving load or not, will file forecasts of new customers that they expect to gain via the OEW and other periods for Resource Adequacy (RA) compliance years 2010 and 2011 according to the rule set forth by the Commission's Energy Division for the RA process in Rulemaking (R.) 09-10-012. Energy Division will issue an amended RA Guide and reporting template for the 2010 compliance year as well as a RA Guide and reporting template for the 2011 compliance year.~~

~~b.—Enrollment during the OEW will be as follows:~~

~~(1) A temporary one-time waiver of the six (6) month advance notice requirement for all DA-eligible customers, will be granted so that all DA-eligible customers will have the opportunity to submit an NOI as of April 16, 2010, if they wish to do so, pursuant to the process described in Section C.4.b(3) below.~~

(Continued)

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**ELECTRIC RULE NO. 22.1**

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 9

~~C.—Phase In Period (Cont'd.)~~

(N)

~~4.—Enrollments During The Open Enrollment Window (Cont'd.)~~

(N)

~~b.—Enrollment during the OEW will be as follows: (Cont'd.)~~

~~(2) A one-time permanent waiver of the current Bundled Portfolio Service (BPS) commitments in existence on April 11, 2010 shall apply so that all DA-eligible customers may enroll in DA service as of the OEW, if they wish to do so, pursuant to the process described in Section C.4.b(3) below. The one-time waiver will apply to a BPS commitment in existence on April 11, 2010 even if the customer does not elect to transfer to DA service during the OEW. At the end of the OEW, these customers may elect DA service at any time with the required six-month advance notice, assuming there is room under the annual limits during the phase-in period or Overall DA Cap. However, the three-year BPS commitment shall continue to apply anytime a DA customer returns to BPS:~~

~~(3) DA-eligible customers may begin submitting Notice Of Intent To Transfer To Direct Access Service During The Open Enrollment Window (NOI) forms starting at 9:00 a.m. PDT on April 16, 2010. The methods for submitting NOIs will be as specified on PG&E's website. NOI forms must be submitted separately. In the event multiple NOI forms are received by PG&E under a single submission (e.g. the same email), all NOI forms contained in the submission will be rejected. All service accounts listed in an NOI must be for the same customer of record (a customer of record will be distinguished by the Federal Tax Identification (FTI) number listed in PG&E's customer information system), as specified on the NOI. Service accounts with an FTI number that does not match the FTI number for the customer of record indicated on the NOI will be rejected.~~

~~(4) Each NOI received by PG&E will be time and date stamped by PG&E to determine precedence. The daily batch process for accepting NOIs described in Section C.4.b(5) during the OEW will allow for a ten (10) percent threshold above the 2010 Annual Limit as described in Section C.4.b(5) below.~~

(N)

(Continued)



**ELECTRIC RULE NO. 22.1**

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 10

~~C.—Phase-In Period (Cont'd.)~~

(N)

~~4.—Enrollments During The Open Enrollment Window (Cont'd.)~~

(N)

~~b.—Enrollment during the OEW will be as follows: (Cont'd.)~~

~~(5) PG&E will process NOI's in daily (12:00 a.m. to 11:59 p.m. PDT) batches. Each daily batch of NOIs will, within twenty (20) days of receipt, be accepted unless and until the 2010 Load Cap is reached. A daily batch that causes the 2010 Load Cap to be exceeded will nevertheless be accepted provided that such daily batch does not exceed the 2010 Load Cap, as defined in Section C.2.a, by more than ten (10) percent of the 2010 Annual Limit. Should a daily batch cause the 2010 Load Cap to be exceeded by more than ten (10) percent of the 2010 Annual Limit, NOIs in that particular daily batch will be accepted on a first come, first served basis (based on the date/time stamp of the NOI) up to the 2010 Load Cap plus a threshold of no more than ten (10) percent of the 2010 Annual Limit, as defined in Section C.2.a. All other NOIs in that particular daily batch will be rejected. To maximize NOI acceptance in that particular daily batch that causes the 2010 Load Cap to be exceeded by more than ten (10) percent of the 2010 Annual Limit, PG&E may accept individual service accounts in the order they are listed on the last NOI accepted in that daily batch up to the amount of load allowed under the 2010 Load Cap plus the ten (10) percent threshold. All other NOIs in that particular daily batch will be placed on a wait list or rejected, as described below.~~

~~(6) NOIs submitted during the OEW will not be accepted once the 2010 Load Cap has been reached. If an NOI is received prior to reaching the 2010 Load Cap, an NOI that is found to have a deficiency (e.g. a typographical error in the service account number) may be accepted on the condition that it is corrected by the customer within two (2) business days after PG&E notifies the customer of such deficiency. NOIs will be void in the event a Direct Access Service Request (DASR) is not timely submitted, as described in Section C.4.b(7) below, or in the event a deficiency in an NOI is not corrected by the customer within two (2) business days.~~

(N)

(Continued)

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**ELECTRIC RULE NO. 22.1**

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

~~C. Phase-In Period (Cont'd.)~~

~~4. Enrollments During The Open Enrollment Window (Cont'd.)~~

~~b. Enrollment during the OEW will be as follows: (Cont'd.)~~

~~(7) For NOIs accepted during the OEW, PG&E will notify the customer of NOI acceptance within twenty (20) days of NOI receipt, and will instruct the customer to notify its Electric Service Provider (ESP) that a DASR to switch a customer's service account(s) to DA service must be submitted to PG&E for each eligible service account within sixty (60) calendar days of the date PG&E's notice of NOI acceptance is sent to the customer~~

~~(8) The customer will have sixty (60) calendar days from the date PG&E's notice of NOI acceptance is sent to cause its ESP to submit a DASR for each eligible service account. DASRs will be processed pursuant to the DASR processing provisions under Rule 22 and eligible service accounts will be switched to DA service on their next scheduled meter read date, or the date specified on the DASR, if different from the next meter read date, depending on when PG&E receives the DASR. Although Rule 22.E.18 allows PG&E, the customer and ESP to mutually agree to a different service change date for the service changes requested in the DASR, PG&E may be unable to accommodate special service change dates during the OEW. Nothing in this Section C is intended to rescind Rule 22:E.18, however, it may not be operable during the OEW.~~

~~(9) If a DASR is not received by PG&E for an eligible service account listed on an accepted NOI by the end of the sixty (60) calendar day period, the customer's NOI for that eligible service account will be void.~~

~~(10) Any service account's NOI voided for failure to submit a DASR within the sixty (60) calendar day period will not be subject to a three (3) year minimum BPS commitment period as a result of such failure. This exception will apply only to service account(s) included on NOIs accepted during the OEW.~~

(N)

(N)

(Continued)



**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 12

~~C.—Phase In Period (Cont'd.)~~

~~4.—Enrollments During The Open Enrollment Window (Cont'd.)~~

~~(11) If the 2010 Load Cap is reached during the OEW, PG&E will stop accepting NOIs, and will begin placing submitted NOIs on a wait list on a first come, first served basis. The wait list shall have a maximum capacity equal to twenty five (25) percent of the 2010 Annual Limit, as defined in Section C.2.a, and shall be maintained until the last day of the OEW. Should any room under the 2010 Load Cap become available during the OEW as a result of any voided NOIs, within one (1) business day of any room becoming available, PG&E will notify eligible customers on the wait list by email of the acceptance of their NOIs. PG&E will continue to issue such email notices, on a one (1) business day basis as room becomes available during the OEW, through the last day of the OEW. A customer coming off the OEW wait list will have sixty (60) days after PG&E's notice of the NOI acceptance to cause its ESP to submit a DASR for each eligible service account to PG&E. If a DASR is not received by PG&E by the end of the sixty (60) day period, the customer's NOI for that service account will be void, and the exception under Section C.4.b(10) for the three year BPS commitment will apply. The wait list will end on the last day of the OEW. Any NOIs on the wait list that were not accepted during the OEW will be void, and customers will be notified that they can begin submitting Six Month Notice To Transfer To Direct Access Service forms as early as July 16, 2010 to switch to DA in 2011. No wait list will be used after the OEW.~~

(T)

~~(12) The OEW will close at 11:59 p.m. PDT on July 15, 2010. There will be no OEW in subsequent years of the Phase in Period.~~

(T)

~~5.—All LSEs that intend to serve load during 2011 will refile load forecasts for the 2011 RA compliance year on May 20, 2010. This revised forecast shall account both for customer migration up to that date, but also to forecast expected customer migration during the second phase of DA access that commences in January 16, 2011. The updated load forecasts due by May 26, 2010 will be used by the Energy Division and California Energy Commission to develop Local RA obligations, inclusive of adjustments, as accurately as possible within the constraints of the 2011 RA filing cycle.~~

(T)

(Continued)

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**ELECTRIC RULE NO. 22.1**

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 13

~~C. Phase-In Period (Cont'd.)~~

~~6. Enrollment after the OEWS closes:~~

~~The following describes the enrollment processes, by year, after the Open Enrollment Window, described in Section C.4 closes.~~

~~a. In 2010:~~

~~(1) DA-eligible customers can begin submitting Six Month Notice To Transfer To Direct Access Service (Six Month Notice) forms as of 9:00 a.m. PDT on July 16, 2010. The methods for submitting six-month notices will be as specified on PG&E's website. Six-month notices must be submitted separately. In the event multiple six-month notices are received by PG&E under a single submission (e.g. the same email), all six-month notices contained in the submission will be rejected. All service accounts listed on a six-month notice must be for the same customer of record indicated on the six-month notice. Service accounts with an FTI that does not match the FTI number for the customer of record indicated on the six-month notice will be rejected. PG&E will use the same daily batch process, as described in Section C.4.b(5) above for accepting six-month notices for any room under the 2011 Load Cap and will allow for up to a ten (10) percent threshold over the 2011 Annual Limit, as defined in Section C.2.a.~~

(T)

~~(2) Each six-month notice received by PG&E will be time and date stamped by PG&E to determine precedence. PG&E will process each six-month notice as described in Section B.2.a, above. The daily batch process for accepting the Six Month Notice To Transfer To Direct Access Service will follow the process established for the NOIs (described in Section C.4.b(5) above) will allow for up to a ten (10) percent threshold above the 2011 Annual Limit.~~

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**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 14

~~C.—Phase-In Period (Cont'd.)~~

~~6.—Enrollment after the OEW closes: (Cont'd.)~~

~~a.—In 2010: (Cont'd.)~~

- ~~(3) A six month notice that is found to have a deficiency (e.g. a typographical error in the service account number) may be accepted on the condition that it is corrected by the customer within two (2) business days after PG&E notifies the customer of such deficiency. Six month notices will be void in the event a deficiency in a six month notice is not corrected by the customer within two (2) business days.~~
- ~~(4) A customer with an accepted six month notice will be switched to DA service starting in January 2011, provided the customer's six (6) month advanced notice period has been satisfied and a DASR for each eligible service account has been timely received.~~
- ~~(5) DASRs will be processed pursuant to Sections B.2.a(1) and B.2.a(2) and the DASR processing provisions under Rule 22.~~
- ~~(6) Once the 2011 Load Cap is reached, PG&E will stop accepting Six Month Notice To Transfer To Direct Access Service forms.~~

(N)

(N)

(N)

(Continued)

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**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

~~C.—Phase In Period (Cont'd.)~~

~~6.—Enrollment after the OEW closes: (Cont'd.)~~

~~b.—In 2011:~~

- ~~1)—DA-eligible customers can begin submitting Six Month Notice To Transfer To Direct Access Service forms as of 9:00 a.m. PST on January 3, 2011 to switch to DA in 2011 or 2012, depending on whether there is room available under the applicable Load Cap. The methods for submitting six-month notices will be as specified on PG&E's website. Six-month notices must be submitted separately. In the event multiple six-month notices are received by PG&E under a single submission (e.g. the same email), all six-month notices contained in the submission will be rejected. All service accounts listed on a six-month notice must be for the same customer of record indicated on the six-month notice. Service accounts with an FTI that does not match the FTI number for the customer of record indicated on the Six Month Notice will be rejected. PG&E will process each six-month notice as described in Section B.2.a above. PG&E will accept Six Month Notice To Transfer To Direct Access Service forms up to the 2012 Load Cap. The daily batch process for accepting Six Month Notice To Transfer To Direct Access Service forms will follow the process established for the NOIs described in Section C.4.b(5) and will allow for up to a ten (10) percent threshold above the 2012 Annual Limit.~~
- ~~2)—Each six-month notice received by PG&E will be time and date stamped by PG&E to determine precedence. PG&E will process each six-month notice as described in Section B.2.a, above. The daily batch process for accepting the Six Month Notice To Transfer To Direct Access Service will follow the process established for the NOIs (described in Section C.4.b(5) above) will allow for up to a ten (10) percent threshold above the 2012 Annual Limit.~~

(N)

(N)

(N)

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**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

~~C.—Phase In Period (Cont'd.)~~

~~6.—Enrollment after the OEW closes: (Cont'd.)~~

~~b.—In 2011: (Cont'd.)~~

- ~~(3)—A six month notice that is found to have a deficiency (e.g. a typographical error in the service account number) may be accepted on the condition that it is corrected by the customer within two (2) business days after PG&E notifies the customer of such deficiency. Six month notices will be void in the event a deficiency in a six month notice is not corrected by the customer within two (2) business days.~~
- ~~(4)—A customer with an accepted Six Month Notice To Transfer To Direct Access Service will be switched to DA as soon as possible (depending on whether there is room under the 2011 Load Cap), but in any event starting in January 2012, provided the customer's 6 month advanced notice period has been satisfied and a DASR has been timely received for each eligible service account. If there is no room available under the 2011 Load Cap, customers who submit Six Month Notice To Transfer To Direct Access Service forms prior to July 2011 may need to remain on bundled service for up to twelve (12) months before being able to switch to DA service. If room under the 2011 Load Cap subsequently becomes available in 2011, some customers may be able to switch to DA service prior to 2012, provided the 6 month advanced notice period has been satisfied and a DASR for each eligible service account has been timely received.~~
- ~~5)—DASRs will be processed pursuant to Sections B.2.a(1) and B.2.a(2) and the DASR processing provisions under Rule 22.~~
- ~~6)—Once the 2012 Load Cap is reached, PG&E will stop accepting Six Month Notice To Transfer To Direct Access Service forms.~~

(N)

(N)

(N)

(Continued)



**ELECTRIC RULE NO. 22.1**  
**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

~~C.—Phase In Period (Cont'd.)~~

~~6.—Enrollment after the OEW closes: (Cont'd.)~~

~~b.—In 2011: (Cont'd.)~~

~~7) If room under the 2012 Load Cap subsequently becomes available, PG&E will update its website to notify customers that it is accepting Six Month Notice To Transfer To Direct Access Service forms. Once received by PG&E, customers will have a three (3) business day rescission period after which advance notifications cannot be canceled. PG&E will use the same daily batch process described above for accepting Six Month Notice To Transfer To Direct Access Service forms for any room under the 2012 Load Cap. However, customers who submit Six Month Notice To Transfer To Direct Access Service forms prior to July 2011 may be required to remain on bundled service for longer than six (6) months (but not more than twelve (12) months) before switching to DA service, if there is no room under the 2011 Load Cap.~~

~~c)—In 2012 and 2013:~~

~~1) PG&E will use the same enrollment process as described above for 2011, using the applicable annual limits, except that: (1) a ten (10) percent threshold for daily batch processing will not apply to the 2013 Annual Limit because it represents the Overall DA Cap; and (2) DA-eligible customers can begin submitting Six Month Notice To Transfer To Direct Access Service forms as of 9:00 a.m. PST on January 2, 2012 to switch to DA in 2012 or 2013, depending on whether there is room available under the 2012 Annual Limit.~~

(N)

(N)

(Continued)



**ELECTRIC RULE NO. 22.1**

**DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES**

Sheet 18

~~C. Phase In Period (Cont'd.)~~

~~7) During the Phase in Period, PG&E will indicate on its public website whether NOIs (during OEW) or Six Month Notice To Transfer To Direct Access Service forms (after the OEW) may be submitted, and update this information regularly, as reasonably necessary, but in no event less frequently than monthly. This information should be sufficient to inform customers and ESPs whether there is room available under the annual limits during the phase in or the Overall DA Cap after the phase in. PG&E will provide notice on its public website when the level of annualized sales for customers electing DA service approaches a certain percentage of the annual limit or Overall DA Cap (e.g., 95%).~~

~~Changes in the twelve (12) month usage of DA accounts will be reflected in order to determine the DA load availability. No customer taking DA service while room was available under the Overall DA Cap will be removed from DA service as a result of growth in DA load.~~

(N)

(N)

(Continued)

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**ELECTRIC RULE NO. 22.1**  
DIRECT ACCESS SERVICE SWITCHING EXEMPTION RULES

Sheet 19

DC. Post-Phase-In Period Direct Access Enrollment Process

The following describes the Direct Access enrollment process after the Phase-In Limited Expansion Window Period, described in Section C-2E, closes:

1. Customers or their authorized agent may submit Six-Month Notices via email or an online IOU form, if available, during a prescribed five (5)-business day window (Submission Period) in the second full business week in June of each year for space under the established Overall DA Cap that may become available during the twelve (12) months of the subsequent calendar year. The Submission Period will begin on Monday at 9:00 a.m. PDT and end on Friday at 5:00 p.m. PDT. Six-Month Notices received prior to 9:00 a.m. PDT Monday or after 5:00 p.m. PDT Friday will be rejected. Submissions must be made by or on behalf of an individual customer and shall include the following information: (D)
  - a. Customer Name, Six-Month Notice, Submitter Name, and number of service accounts being submitted.
  - b. A completed Six-Month Notice may cover multiple service accounts but they must all be for the same customer, under that customer's Federal Tax Identification (FTI) number or other PG&E customer identifiers. A Six-Month Notice found to include multiple FTI numbers or other incomplete information may be considered to have a deficiency. Upon email notification from PG&E of such deficiency, customers or their authorized agent shall have five (5) business days to correct the deficient Six-Month. (T)  
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  - c. A prioritized list of the submitted service accounts (in the event the available space under the established Overall DA Cap cannot accommodate the entire list).

(Continued)

<i>Advice</i>	4966-E	<i>Issued by</i>	<i>Date Filed</i>	November 30, 2016
<i>Decision</i>	12-12-026	<b>Steven Malnight</b>	<i>Effective</i>	December 30, 2016
		<i>Senior Vice President</i>	<i>Resolution</i>	
		<i>Regulatory Affairs</i>		





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- 8. Within ten (10) business days, following the thirty (30) business day review period, customers will receive email notification that their Six-Month Notice has been accepted or placed on the Wait List along with their initial sequence number, based upon the random "lottery" number. (N)
- 9. All Six-Month Notices on the Wait List on the last business day of each calendar year will be cancelled and superseded by the following year's Wait List.
- 10. On ~~the last business day of each~~ a monthly basis, PG&E will determine if there is room under the Overall DA Cap for the prior month and notify the first customer on the Wait List that there is available space under the Overall DA Cap:
  - a. If the available space under the Overall DA Cap is sufficient to accommodate all of the customer's Wait-Listed service accounts, PG&E will notify the customer of the DASR Due Date for each accepted service account at least forty-five (45) days in advance of the customer's earliest possible switch date. During this process, a Six-Month Notice that is found to have a deficiency (e.g., incorrect service account number) may be accepted on the condition that it is corrected by the customer within five (5) business days after PG&E notifies the customer of such deficiency. Six-Month Notices will be void in the event a deficiency in a Six-Month Notice is not corrected by the customer within five (5) business days, but only as to the service account(s) for which there was an uncorrected deficiency. Customers will have fifteen (15) business days either to accept or decline the space offered, without penalty. Should the customer decline the space offered, the customer is removed from that year's Wait List and remains on utility bundled service. PG&E will then notify the next customer on the Wait List.
  - b. If the available space under the Overall DA Cap is not sufficient to accommodate all of the customer's service accounts on the Wait List, PG&E will notify the customer at least forty-five (45) days in advance of the customer's earliest possible switch date of the eligible service account(s) and will work with the customer to determine the service accounts to be switched. The remaining service accounts, if any, on the customer's list will remain on the Wait List. Customers will have fifteen (15) business days either to accept or decline the space offered, without penalty. Should the customer decline to accept the space offered, the customer is removed from that year's Wait List and remains on utility bundled service.
  - c. Should a customer accept the offer and fail to submit a DASR by the DASR Due Date, the customer's service account(s) will be switched to Transitional Bundled Service and be subject to the then current Switching Exemption Rules. (N)

Advice 4178-E  
Decision 12-12-026

Issued by  
**Brian K. Cherry**  
Vice President  
Regulatory Relations

Date Filed January 18, 2013  
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Resolution



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11. Between Submission Periods, PG&E will indicate on its public website whether Six Month Notice To Transfer To Direct Access Service forms may be submitted, and update this information regularly, as reasonably necessary, but in no event less frequently than monthly. This information should be sufficient to inform customers and ESPs whether there is room available under the Overall DA Cap.

D. Direct Access Load Limits

1. Pursuant to D.19-05-043, customers who are allocated load space under the limited DA expansion may begin switching to DA on or after January 1, 2021. The load space under the limited DA expansion will be allocated over a two (2) year period (Limited Expansion Window Period). The Limited Expansion Window Period for allocating load space will begin on January 1, 2020 and continue for two (2) calendar years. The annual limits on DA load will be increased over the two-year Limited Expansion Window Period as described below, up to the maximum DA Cap of eleven billion, three hundred ninety three million, two hundred twenty five thousand, two hundred eighty five (11,393,225,285) kilowatt-hours (KWh) established for PG&E's service territory (Overall DA Cap), as defined per D.19-05-043, Table 1, Authorized DA Cap Increase by Service Territory (in KWh). Kilowatt-hours (kWh) remaining under the annual limit in one year will be rolled over to subsequent years as part of the cumulative increasing annual limits during the Limited Expansion Window Period. Pursuant to D.19-05-043, the existing maximum DA Cap of 9,520,000,000 kWh authorized by D.10-03-022, will be expanded by a New DA Load Allowance of 1,873,225,285 kWh over a two year period, and the annual kWh limits are set based on a percentage of the New DA Load Allowance as follows:

- a. 2020 Annual Limit – Fifty (50) percent of the New DA Load Allowance, or 873,433,379.5 kWh. The 2020 Load Cap: 10,456,612,642.5 kWh [9,520,000,000 kWh + 936,612,642.5 kWh]
- b. 2021 Annual Limit – The remaining fifty (50) percent of the New DA Load Allowance, or 873,433,379.5 kWh, for one hundred (100) percent of the room under the Overall DA Cap. The 2021 Load Cap: 11,393,225,285 kWh [10,456,612,642.5 kWh + 936,612,642.5 kWh]

2. Changes in the twelve (12) month usage of DA accounts and Reserved DA Load, as defined below, will be reflected in order to determine the DA load availability. No customer taking DA service while room was available under the Overall DA Cap will be removed from DA service as a result of growth in DA load.

Pursuant to D.19-05-005, Reserved DA Load is defined as current load that is pending an offer or DA affidavit or in transition from Transitional Bundled Service, or a set aside pursuant to D.10-03-022.



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E. Limited Expansion Window Period

The following describes the Direct Access enrollment process during the Limited Expansion Window Period.

For customers who are offered and accept load space under the Limited Expansion Window Period enrollment process, if a customer fails to submit a Direct Access Service Request by the DASR Due Date, the provisions regarding the sixty (60) day Transitional Bundled Service period, six month Transitional Commodity pricing period, and an eighteen (18) month commitment period on bundled portfolio service as prescribed on the Six Month Notice will not apply.

1. Enrollments Under the 2020 Annual Limit

a. Pursuant to D.19-05-043, only customers who had participated in the 2018 Submission Period, as described in Section C, above, and were placed on the Wait List that is effective for 2019 (2019 Wait List) will be offered an opportunity to enroll on DA under the 2020 Annual Limit.

b. By August 12, 2019, PG&E will determine if there is room under the 2020 Annual Load Limit and notify the customers on the 2019 Wait List based on the availability under the 2020 Annual Load Limit:

(1) PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. Customers will have until 5:00 PM on September 3, 2019 to either to accept or decline the space offered. Should the customer decline the space offered or fail to respond timely, the customer is removed from the 2019 Wait List and will remain on utility Bundled Service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer(s) on the 2019 Wait List and direct these customers to submit their decisions regarding DA service to PG&E on or before September 3, 2019, at 5:00 p.m.

(2) If the available space under the 2020 Annual Load Limit is not sufficient to accommodate all of the customer's service accounts on the 2019 Wait List, PG&E will notify the customer of the DASR Due Date of February 3, 2020 and that the earliest possible switch date will be on or after January 1, 2021, and work with the customer to determine the service accounts to be switched. The remaining service accounts, if any, on the customer's list will remain on the 2019 Wait List. Customers will have until 5:00 PM on September 3, 2019 to accept or decline the space offered. Should the customer decline to accept the space offered, the customer is removed from 2019 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable.

(3) Should a customer accept the space offered and later decide not to pursue DA, it must notify PG&E of its decision to decline the space offered.

(i) If the customer notifies PG&E prior to December 31, 2019 at 11:59 p.m., then PG&E will reallocate the load space to the next customer on the 2019 Wait List. PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. If



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the available space is not sufficient to accommodate all of the customer's service accounts on the 2019 Wait List, PG&E will work with the customer to determine which service accounts to be switched. Customers will have fifteen (15) business days to either accept or decline the space offered. Should the customer decline to accept the space offered, the customer is removed from 2019 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer on the 2019 Wait List.

(ii) If the customer notifies PG&E after December 31, 2019 at 11:59 p.m., then PG&E will reallocate the load space to the next customer on the 2020 Wait List. PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. If the available space is not sufficient to accommodate all of the customer's service accounts on the 2020 Wait List, PG&E will work with the customer to determine which service accounts to be switched. Customers will have fifteen (15) business days to either accept or decline the space offered. Should the customer decline to accept the space offered, the customer is removed from 2020 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer on the 2020 Wait List.

(4) Should a customer accept the offer and fail to submit a DASR by the DASR Due Date of February 3, 2020, the customer's service account(s) will remain on utility Bundled Service or Community Choice Aggregation Service, if applicable.

(5) No space will be offered to customers on the 2019 Wait List or 2020 Wait List after February 3, 2020, or when all of the available space under the 2020 Annual Load Limit has been allocated, whichever occurs first. Any load space under the 2020 Annual Limit that is unallocated, declined or unclaimed timely by the 2019 Wait List or 2020 Wait List customers will be reallocated to customer enrollments under the Overall DA Cap in the following year, as described in Section C, above.

2. Enrollments Under The 2021 Annual Limit

a. DA customers or their authorized agent may submit Six-Month Notices via e mail or an online IOU form during a prescribed five (5) business day window (Submission Period) for space under the established Overall DA Cap that may become available during calendar year 2021. The Submission Period will begin on Monday, June 10, 2019, at 9:00 a.m. PDT and end on Friday, June 14, 2019, at 5:00 p.m. PDT. Six-Month Notices received prior to 9:00 a.m. PDT Monday or after 5:00 p.m. PDT Friday will be rejected. Submissions must be made by or on behalf of an individual customer and shall include the following information:

(1) Customer Name, Six-Month Notice, Submitter Name, and number of service Accounts being submitted.

(2) A completed Six-Month Notice may cover multiple service accounts but they must all be for the same customer, under that customer's Federal Taxpayer Identification (FTI) or other PG&E customer identifiers. A Six-



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Month Notice found to include multiple FTI numbers or other incomplete information may be considered to have a deficiency. Upon e-mail notification from PG&E of such deficiency, customers or their authorized agent shall have five (5) business days to correct the deficient Six-Month Notice.

(3) Any duplicate Six-Month Notices covering the same service accounts will be discarded. If more than one Six-Month Notice is received for a service account, only one will be confirmed; all others will be ineligible. For any Six-Month Notice that PG&E determines to be ineligible, it will send via e-mail a notice to the party from whom the Six-Month Notice was received that it has been determined to be ineligible. If the party believes that PG&E's determination of ineligibility is in error, the party will have five (5) business days to dispute the PG&E's determination, upon which PG&E will review its determination and advise the submitter of the information required to resolve the dispute.

b. A prioritized list of the submitted service accounts (in the event the available space under the established Overall DA Cap cannot accommodate the entire list).

c. Upon PG&E's receipt of each Six-Month Notice, PG&E will send an automatic receipt via e-mail, addressed to the party, from whom the notice was received, acknowledging that the Notice was received. The purpose of this e mail shall be just to confirm that the submission was received. It shall neither confer any priority, nor impact the lottery process.

d. PG&E to review/audit/confirm Six-Month Notices within thirty (30) business days following the close of the Submission Period.

e. During the review and audit process, a Six-Month Notice that is found to have a deficiency (e.g., incorrect service account number) may be accepted on the condition that it is corrected by the customer within five (5) business days after PG&E notifies the customer of such deficiency. Six-Month Notices will be void in the event a deficiency in a Six-Month Notice is not corrected by the customer within five (5) business days, but only as to the service account(s) for which there was an uncorrected deficiency.

f. Six-Month Notices will be accepted subject to all deficiencies being resolved and availability of space under the established 2021 Annual Limit. By the thirtieth (30th) business day of the review period, PG&E will run the "randomizer" tool (Microsoft Access or some other tool agreed-upon by all parties) to assign a random number to each customer submission.

g. The Six-Month Notices will be ordered in sequence by their randomly assigned number and accepted subject to the established Overall DA Load Limit. Remaining Six Month Notices will be placed on a wait list (Wait List) in the order assigned by the randomizer, and will be maintained on that Wait List for the subsequent calendar year.

h. By August 12, 2019, customers will receive e-mail notification that their Six-Month Notice has been accepted or placed on the Wait List along with their initial sequence number, based upon the random "lottery" number.



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- (1) If the available space under the 2021 Annual Limit is sufficient to accommodate all of the customer's Wait-Listed service accounts, PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. During this process, a Six-Month Notice that is found to have a deficiency (e.g., incorrect service account number) may be accepted on the condition that it is corrected by the customer within five (5) business days after PG&E notifies the customer of such deficiency. Six-Month Notices will be void in the event a deficiency in a Six-Month Notice is not corrected by the customer within five (5) business days, but only as to the service account(s) for which there was an uncorrected deficiency. Customers will have until September 3, 2019 to either to accept or decline the space offered, without penalty. Should the customer decline the space offered or fails to respond timely, the customer is removed from the 2020 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer on the 2020 Wait List and direct these customers to submit their decisions regarding DA service to the PG&E on or before September 6, 2019, at 5:00 p.m. within fifteen (15) business days.
- (2) If the available space under the 2021 Annual Limit is not sufficient to accommodate all of the customer's service accounts on the Wait List, PG&E will notify the customer of the DASR Due Date of February 3, 2020 and that the earliest possible switch date will be on or after January 1, 2021, and will work with the customer to determine the service accounts to be switched. The remaining service accounts, if any, on the customer's list will remain on the Wait List. Customers will have until September 3, 2019 to accept or decline the space offered, without penalty. Should the customer decline to accept the space offered or fails to respond timely, the customer is removed from that year's Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable..
- (3) Should a customer accept the space offered and later decide not to pursue DA, it must notify PG&E of its decision to decline the space offered. If the customer notifies PG&E prior to February 3, 2020, PG&E will reallocate the load space to the next customer on the 2020 Wait List. PG&E will notify the customer of the DASR Due Date of February 3, 2020 for each accepted service account and that the earliest possible switch date will be on or after January 1, 2021. If the available space is not sufficient to accommodate all of the customer's service accounts on the 2020 Wait List, PG&E will work with the customer to determine which service accounts to be switched. Customers will have fifteen (15) business days to either accept or decline the space offered. Should the customer decline to accept the space offered, the customer is removed from 2020 Wait List and remains on utility bundled service or Community Choice Aggregation Service, if applicable. PG&E will then notify the next customer on the 2020 Wait List.

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Decision 12-12-026

Issued by  
**Brian K. Cherry**  
Vice President  
Regulatory Relations

Date Filed January 18, 2013  
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Resolution



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- (4) Should a customer accept the offer and fail to submit a DASR by the DASR Due Date of February 3, 2020, the customer's service account(s) will remain on utility Bundled Service or Community Choice Aggregation Service, if applicable.
- (5) No space will be offered to customers on the 2020 Wait List after February 3, 2020, or when all of the available space under the Overall DA Cap has been allocated, whichever occurs first. Any load space under the 2020 Annual Limit that is unallocated, declined or unclaimed timely by the 2020 Wait List customers will be reallocated to customer enrollments under the Overall DA Cap in the following year, as described in Section C, above.
- 3. By September 10, 2019, PG&E will provide to each affected CCA the aggregate hourly peak demand and hourly load data for the prior twelve months for 2019 and 2020 waitlist customers who accepted an opportunity to switch from that CCA's service to DA service as of September 3, 2019.
- 4. By February 10, 2020, PG&E will provide to each affected CCA the aggregate hourly peak demand and hourly load data from January 1, 2019 to December 31, 2019 for 2019 and 2020 waitlist customers who submitted a DASR to switch from that CCA's service to DA service as of February 3, 2020.

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

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