

July 7, 2000

PUC 110  
x-PUF 000  
A.99-01-019  
A.99-02-029

**SDG&E ADVICE LETTER 1233-E**  
(U 902-E)

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

Subject: **COMPLIANCE WITH PTR PHASE II DECISION 00-06-034: IMPLEMENT HOURLY PX PRICING FOR CUSTOMERS WITH HOURLY INTERVAL METERING**

Sempra Energy, on behalf of San Diego Gas & Electric Company (SDG&E), hereby transmits for filing revisions applicable to SDG&E's electric tariffs, as shown on the Attachment.

**PURPOSE**

This filing is being made pursuant to California Public Utilities Commission (Commission) Decision (D.) 00-06-034, dated June 8, 2000, in SDG&E's Post Transition Ratemaking (PTR) Application (A.) 99-01-019, which requires that all bundled customers with hourly interval meters shall be billed using hourly data once the rate freeze ends. This filing revises the language in *Power Exchange Energy Cost - Schedule PX*, *The Hourly PX Rate Option Rules - Rule 24*, and *Direct Access Rules - Rule 25* applicable to SDG&E's Electric Department in accordance with the provisions set forth in D.00-06-034 pertaining to hourly interval metering.

**BACKGROUND**

In California, a fundamental objective of electric industry restructuring has been to increase the customer's ability to respond to market signals in order to foster greater market efficiency and customer choice. As part of this statewide effort, Ordering Paragraph 19, of Commission D.00-06-034, requires that all bundled customers with hourly interval meters shall be billed using hourly data once the rate freeze ends. SDG&E ended its rate freeze on July 1, 1999.

Ordering Paragraph 21, of Commission D.00-06-034, directs SDG&E to file an advice letter to implement hourly Power Exchange (PX) pricing. SDG&E's bundled customers with hourly interval meters will be billed using hourly data in accordance with Special Condition 8 under SDG&E's Schedule PX. SDG&E plans to implement hourly PX pricing in 3-phases, as shown below, in order to allow for computer programming and testing of its billing system. Implementation of hourly PX pricing will occur in 3-phases as follows:

- (1) Effective August 1, 2000 - Bundled customers >4500kW will be switched to hourly PX pricing.
- (2) Effective November 1, 2000 - Bundled customers >500kW and customers on the interruptible Rate Schedule A-V1, A-V2, or RTP-2 will be switched to hourly PX pricing.
- (3) After November 1, 2000 - Direct Access customers >500kW who return to SDG&E for procurement of electricity will be required to take service on hourly PX pricing.

By allowing customers to take advantage of PX price variations, hourly pricing supports the Commission's long-established policy to increase customer responsiveness to price signals, advances market efficiency and electric grid reliability in providing an incentive for customers to reduce load and/or shift load to off-peak periods. This approach may aid in promoting lower energy prices.

SDG&E customers participating in load research or load profile activities will be exempt from mandatory hourly billing. Customer and market participation in load research and load profiling are vital for the evaluation and analysis used in determining technical feasibility, behavioral efficacy, costs and benefits, etc. for market research, revenue allocation, and rate design purposes.

Some customers may chose to not be subject to hourly PX pricing. Those customers have an option to purchase their electric commodity from an Energy Service Provider (ESP). ESPs can offer a variety of electric commodity options, such as a fixed price, which can provide protection from market volatility. As a convenience to customers, SDG&E has made available on its website a complete list of electric ESPs.

In compliance with D.00-06-034, SDG&E requests Commission approval to implement hourly PX pricing as described herein. Additionally, SDG&E requests Commission approval of its revised electric tariffs.

### **EFFECTIVE DATE**

SDG&E respectfully requests that this filing become effective on August 1, 2000, in order to implement the first phase of hourly PX pricing. Ordering Paragraph 21, of D.00-06-034, states that SDG&E's filing will "...be effective when Energy Division determines SDG&E is in compliance."

### **PROTEST**

Anyone may protest this Advice Letter to the California Public Utilities Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. The protest must be made either in writing or by facsimile and received within 20 days of the date this Advice Letter was filed with the Commission. There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

IMC Branch Chief  
Energy Division

California Public Utilities Commission  
505 Van Ness Avenue, Room 4002  
San Francisco, CA 94102

A copy should also be mailed to the Energy Division-IMC Branch, Room 4005 (at the address shown above). It is also requested that a copy of the protest be sent via both e-mail and facsimile to Sempra Energy on the same date it is mailed or delivered to the Commission (at the address shown below).

Attn: C. Richard Swanson  
Regulatory Tariff Manager  
Sempra Energy - HQ14B  
101 Ash Street  
San Diego, CA 92101-3017  
Facsimile No. (619) 696-4027  
E-Mail: [rswanson@sempra.com](mailto:rswanson@sempra.com)

**NOTICE**

In accordance with Section III-G of General Order 96-A, Sempra Energy, has on July 7, 2000, served a copy of this filing to the utilities and interested parties shown on the attached list, including interested parties in A.99-01-019 and A.99-02-029, by mailing them a copy hereof, properly stamped and addressed.

Address changes should be directed to Martha Ulloa of Sempra Energy by facsimile at (619) 696-4027 or by e-mail at [Mulloa@sempra.com](mailto:Mulloa@sempra.com).

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LEE SCHAVRIEN  
Director, Regulatory Case Management  
& Tariff Administration

Enclosures  
(cc list attached)  
(1233-E.doc)

ATTACHMENT A  
ADVICE LETTER 1233-E

Cal. P.U.C. Sheet No.	Title of Sheet	Canceling Cal. P.U.C. Sheet No.
Revised 13303-E	SCHEDULE PX, POWER EXCHANGE ENERGY COST, Sheet 1	Revised 13241-E
Revised 13304-E	SCHEDULE PX, POWER EXCHANGE ENERGY COST, Sheet 6	Revised 13246-E
Revised 13305-E	SCHEDULE PX, POWER EXCHANGE ENERGY COST, Sheet 7	Original 13247-E
Revised 13306-E	RULE 24, THE HOURLY PX RATE OPTION RULES, Sheet 1	Revised 11212-E
Revised 13307-E	RULE 24, THE HOURLY PX RATE OPTION RULES, Sheet 5	Original 10521-E
Revised 13308-E	RULE 24, THE HOURLY PX RATE OPTION RULES, Sheet 7	Original 10523-E
Revised 13309-E	RULE 25, DIRECT ACCESS RULES, Sheet 2	Revised 11900-E
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Revised 13311-E	TABLE OF CONTENTS, Sheet 5	Revised 13297-E



**SCHEDULE PX**

Sheet 1

POWER EXCHANGE ENERGY COST

APPLICABILITY

Applicable to all customers who receive UDC Bundled Service and either, elect service under the utility's Hourly PX Rate Option, or elect Direct Access or are required to take service on the utility's Hourly PX Rate Option in accordance with Special Condition 8.

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TERRITORY

Applicable throughout the territory served by the utility.

RATES

This schedule will apply where the calculation of the Power Exchange (PX) energy cost is required for either energy cost credits or charges. The PX cost used for billing will consist of the forward market cost plus real-time settlement costs, i.e., the uplift adjustment, adjusted by Distribution Loss Factors (DLFs). The utility shall utilize the best information available for calculating the PX energy cost. Average Schedule PX Prices will be based on the PX costs most closely corresponding to the customer's billing period.

1. Development of Hourly Forward Market Costs (HFMC):

Hourly market clearing prices and loads, or the total costs allocated to the utility by the PX, as a result of day-ahead (DA), Hour-ahead (HA), and/or Block Forward (BF) scheduling of load will be obtained (or estimated to the extent feasible) for each relevant transmission pricing zone on the day preceding each trading day. The HFMC shall be calculated for each hour as the sum of the DA PX price plus ISO grid management rate and PX volumetric rate times the MWH purchased in the DA market times uplift adjustment estimation rate (see definition in Special Condition 6), plus the sum of the HA PX price plus ISO grid management rate and PX volumetric rate times the MWH purchased in the HA market times uplift adjustment estimation rate, plus the hourly net gain or loss on transactions in the BF market, all divided by the total MWH purchased in all forward markets for that hour.

2. Uplift Adjustments

The Uplift Adjustment, which includes the real-time costs (i.e. those costs not reflected in charges to customers based upon prices determined from the DA, HA and/or BF scheduling of load) for acquiring power for utility customers for the trading day approximately 60 days earlier, is added to the cost derived in Part 1 of this section. This rate is determined monthly by dividing the actual real-time cost amount less the estimated real-time costs (see definition in Special Condition 7) by the actual load scheduled by the utility, and served by the PX for the month in which the cost was incurred. Two adjustments may eventually be implemented: one for all customers of the utility and an incremental adjustment only for customers without real-time meters. Real-time costs include: ancillary services, replacement reserve, real-time energy, imbalance energy, Unaccounted For Energy (UFE), ISO monthly management costs, PX miscellaneous charges, PX monthly management costs, and PX BF administrative fees and charges net of credits, rebates, or refunds. The uplift adjustment includes the amortization of the previous month's ending balance of the ISO/PX Balancing Account, or its successor, the Purchased Electric Commodity Account.

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**SCHEDULE PX**

POWER EXCHANGE ENERGY COST

ELECTRIC SERVICE ELECTIONS (Continued)

2. Revisions to the Schedule PX Energy Prices

The Hourly Schedule PX Energy Prices will be calculated on a daily basis for the previous day. The Average Schedule PX Energy Prices will be updated on a weekly basis. Revisions to the utility's Hourly Schedule PX Energy Prices and Average Schedule PX Energy Prices will be based on the most current data available, and the resulting prices will be posted to the utility's website at [www.sdge.com](http://www.sdge.com).

The utility will make a temporary adjustment to increase the weekly PX price to eliminate the PX billing lag before the statutory rate freeze ends.

3. Loads for Real-Time Settlements

At the end of each billing cycle, all monthly-metered data must be gathered and allocated to each hour of the billing period using dynamic or statistical load profiles. This load information is then provided to the PX for settlement purposes, along with hourly-metered load data.

The load profile used in settlement will be the same one used for calculating the average PX energy cost described above. In order to calculate the total energy used in a given hour of a given day, meters must be read for every billing cycle that includes that hour. The fraction of billing period use allocated to the hour in question is equal to the fraction from the same day and hour taken from the load profile associated with the customer's billing period. The sum of monthly-metered and hourly-metered loads in each hour is then multiplied by the appropriate DLF to determine the total hourly load used for settlement purposes.

4. Customer Choice on Electric Power Purchases

Charges for purchases of electricity from the PX, as reflected in this schedule, are subject to competition. A customer may purchase electricity from another supplier.

SPECIAL CONDITIONS

1. Definitions. The definitions of principle terms used in this schedule are found either herein or in Rule 1, Definitions.

2. Hourly PX Rate Option. Customers may elect to purchase their electric power directly from the PX on an hourly basis through the utility. These customers will be required to have Interval Metering, as defined in Rule 1, at the customer's expense, and complete Form 143-01959 (6/97), Request for Hourly Pricing. Generation services provided under this schedule must be taken in conjunction with non-generation services provided under Direct Access. See Rule 24 for further details on the service requirements applicable to Hourly PX Rate Option customers. Customers electing the Hourly PX Rate Option will be subject to the provisions on changing rate options listed in Rule 12.

3. Service Restrictions. Service under this schedule is restricted to the entire load served by single meters. The electric load of a single meter may not be partitioned among services rendered under this schedule and services rendered by a non-utility party under Direct Access.

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**RULE 24**

Sheet 1

THE HOURLY PX RATE OPTION RULES

The following terms and conditions apply to UDC customers who receive hourly PX pricing through the UDC. This option that requires Interval Metering as defined below.

A. Customer Service Elections

All UDC customers will acquire their electric power needs under three options:

1. Utility Energy Services - Average PX Pricing (Default UDC Services)

This service preserves traditional UDC electric services, where the UDC performs all energy services for the customer. The UDC will acquire all its electric power requirements from the Power Exchange (PX). All customers who have not chosen to use direct access remain on default UDC services. Customers may choose to return to default UDC services after having elected direct access or virtual direct access. The Average PX Pricing service is not available to some customers as specified in Schedule PX.

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2. Utility Energy Services - Hourly PX Rate Option (Virtual Direct Access)

This service allows customers to purchase electric power from the UDC at the applicable PX price posted each hour. This service requires customers to have in place Interval Metering, as defined in Section B, General Terms, at the customer's expense. The UDC will also provide all energy services under this option. For customers receiving default UDC services, this is a service election that must either be requested by the customer or be mandatory as specified for some customers in Schedule PX.

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3. Non-Utility Energy Services (Direct Access)

This service election allows customers to purchase electric power and, at the customer's election, additional energy services from non-UDC entities known as ESPs.

Direct Access customers who are not defined as Small Customers, as defined in Rule 1, Definitions, will be required to have in place Interval Metering, as defined below, at no expense to the UDC. Pursuant to D.97-05-039, these customers will be eligible to choose either the UDC or ESP to provide meter services. After 1998, the CPUC will extend meter service elections to remaining customers.

Direct Access customers, who have individual service accounts with a maximum demand between 20 and 50 kW for at least nine of the preceding 12 months, and an annual maximum below 80 kW, will be exempt on an interim basis (for at least the full nine months after the start date for Direct Access) from the Interval Metering requirements.

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**RULE 24**

THE HOURLY PX RATE OPTION RULES

B. General Terms (Continued)

13. Franchise Fees And Other Charges

VDA customers continue to be responsible to pay all applicable fees, surcharges and taxes as authorized by law.

14. Service Restrictions for Returning Customers

Customers who elect Virtual Direct Access may return to Default UDC Services at any time except for some customers who are required to receive hourly prices. A VDA customer may switch to and from VDA and Direct Access as frequently as possible, subject to the switching provisions stated in Rule 25, Direct Access Rules. In addition, once a former VDA customer has returned to UDC Services via Direct Access that customer shall be required to return as a VDA customer in circumstances specified in Schedule PX.

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C. Customer Inquiries and Data Accessibility

1. Customer Inquiries

For customers requesting information on Virtual Direct Access, the UDC will make available customer information packets, explaining the customer's choices for electric services, and the procedures and forms needed to implement these services. New customers will receive general information concerning their choices for electric services by contacting the UDC.

2. Customer Request To Initiate Service

For customers initiating a request for electric service from the UDC, the UDC shall inform customers of their ability to choose their electric provider and that the information described in Section C.(1) is available. The UDC shall also inform customers of the toll-free number of the Electric Education Call Center so long as it remains in operation.

3. Access to Customer Usage Data

The UDC will provide customer-specific usage data to the customer. The UDC will provide a maximum of the most recent 12 months of customer usage data, or the amount of data for that specific service account in a format approved by the CPUC. Customer information will be released to the customer up to two times per year per service account at no cost to the requesting party. Thereafter, the UDC will have the ability to assess a processing charge only if approved by the CPUC.

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**RULE 24**

THE HOURLY PX RATE OPTION RULES

B. General Terms (Continued)

- 6. The processing of VDA requests shall be performed along with the processing of requests for Direct Access. VDA requests shall not have priority over Direct Access requests, or vice versa. A priority queue shall initiated only in the event of a backlog of VDA and DA requests to the UDC, with a priority given only to those Direct Access requests that have been warranted to the UDC that at least 50% of the electric power to the DA customer will come from a state-certified renewable energy source supplier meeting the requirements of PU Code Section 365(b)(2).
- 7. If more than one request for VDA is received for a service account within a single VDA processing period (16<sup>th</sup> of the month until the 15<sup>th</sup> of the following month), only the first valid VDA request received will be processed in that period. All subsequent VDA requests will be rejected.
- 8. Accepted VDA requests that do not require a meter change and are received by the UDC on or before the 15<sup>th</sup> of the month will be switched over no later than the next month's scheduled meter reading date for that service account.
- 9. Accepted VDA requests that require a meter change by the UDC will be switched over to Virtual Direct Access on the date of installation. The UDC will endeavor to complete the meter change request within 15 days after acceptance of the VDA request in the absence of a meter installation backlog. The UDC will provide notice of any current meter service backlog or the next available installation date.
- 10. In the event that the ISO governing board declares an emergency and institutes a moratorium of UDC processing of VDA or Direct Access requests, the UDC will comply with such requests and inform customers of the details of emergency plans.
- 11. The UDC and customer, on mutual agreement, may agree to a different service change date for the service changes requested in the VDA request.
- 12. In the Service Agreement, VDA customers must specify one of three Interval Meter service options: Basic, Next Day, and Real-Time. These charges for these options are in addition to the customer's otherwise applicable service rates. These charges are stated under Schedule PX.

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Advice Ltr. No. 1233-E

Decision No. 00-06-034

Issued by  
**William L. Reed**  
Vice President  
Chief Regulatory Officer

Date Filed Jul 7, 2000

Effective \_\_\_\_\_

Resolution No. \_\_\_\_\_



**RULE 25**

DIRECT ACCESS RULES

The following terms and conditions apply to both UDC customers and electric energy service providers who participate in Direct Access. Direct Access shall refer to any end-use UDC customer electing to procure its electricity, and any other CPUC-authorized energy services, directly from energy service providers (ESPs) as defined in Rule 1. ESPs who serve small customer service accounts, as defined in Rule 1, shall be registered with the State of California and meet any certification requirements established by the appropriate State agencies.

A. Customer Service Elections

All UDC customers will acquire their electric power needs under three options. The Hourly PX Rate Option and Direct Access options stated below are effective on the date that the Commission or its delegate declares to be the start of Direct Access.

1. Utility Energy Services - Average PX Pricing (Default UDC Services)

This service preserves traditional UDC electric services, where the UDC performs all energy services for all eligible end-use customers. The UDC will acquire all its electric power requirements from the Power Exchange (PX). All customers who have not chosen to use direct access remain on default UDC services unless Schedule PX requires the customer to take Hourly PX Rates. After November 1, 2000, customers with a maximum demand greater than 500kW with interval data metering will not be allowed to return to default UDC services after having elected direct access. These customers will be required by Schedule PX to receive service under the Hourly PX Rate Option.

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2. Utility Energy Services - Hourly PX Rate Option (Virtual Direct Access)

This service allows customers to purchase electric power from the UDC at the applicable PX price posted each hour. This service requires customers to have in place Interval Metering, as defined in Section B, General Terms, at the customer's expense. For customers receiving default UDC services, this is a service election that must be requested by the customer, except as provided for in Schedule PX.

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3. Non-Utility Energy Services (Direct Access)

This service election allows customers to purchase electric power and, at the customer's election, additional energy services from non-UDC entities known as ESPs.

Direct Access customers who are not defined as Small Customers, as defined in Section B, General Terms, will be required to have in place Interval Metering, as defined below, at no expense to the UDC. Pursuant to D. 97-05-039, these customers will be eligible to choose either the UDC or ESP to provide meter services. After 1998, the CPUC will extend meter service elections to remaining customers. Meter service options are described in Sections G and H.

Direct Access customers, who have individual service accounts with a maximum demand between 20 and 50 kW for at least nine of the preceding 12 months, and an annual maximum demand below 80 kW, will be exempt from the Interval Metering requirements at least until March 31, 2002.

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Date Filed

Jul 7, 2000

Advice Ltr. No. 1233-E

**William L. Reed**

Effective

Decision No. 00-06-034

Vice President  
Chief Regulatory Officer

Resolution No. \_\_\_\_\_



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Chief Regulatory Officer

Resolution No.

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San Diego Gas & Electric Company  
San Diego, California

Revised Cal. P.U.C. Sheet No. 13311-E

Canceling Revised Cal. P.U.C. Sheet No. 13297-E

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Advice Ltr. No. 1233-E

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Issued by  
**William L. Reed**  
Vice President  
Chief Regulatory Officer

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