



UNIVERSAL APPLICATION SYSTEM

Presented by:
Ryan Shahbazi, Sr. Business Analyst, SoCalGas



UAS SWG Members

- The Sub-working group, consisted of IOUs, the Energy Division (ED), Community Based Organizations (CBO), ESA contractors, and others with experience and expertise in application systems.



UAS SWG & SME Members

IOUs (PG&E, SCE, SCG, SDG&E)

CPUC – Energy Division

California Department of Services & Development (CSD)

California American Water

California Air Resource Board (CARB) & GRID Solutions

Center for Sustainable Energy

Center for Accessible Technology (C For AT)

ESA Contractor Network (QCS, RHA, REMCO)

Liberty Hill

Metropolitan Area Advisory Network (MAAC)

Native American Finance Officers Association (NAFOA)

Promotores San Luis Obispo

San Joaquin Valley Clean Energy

ValleyCAN (Clean Air Network)

Background

The UAS Sub-Working Group assembled to meet the requirements of D.21-06-015:

Ordering Paragraph (OP) 45: “Pacific Gas and Electric Company, Southern California Edison Company, Southern California Gas Company and San Diego Gas & Electric Company must set up a Universal Application System working group, as part of the overall Energy Savings Assistance Working Group, to complete the various tasks during a year-long development process.”

OP 46: “Pacific Gas and Electric Company, Southern California Edison Company, Southern California Gas Company and San Diego Gas & Electric Company must submit a report to Energy Division and this proceeding’s service list summarizing the Universal Application System’s working group progress by July 1, 2022. The report will answer various questions and provide the working group’s recommendation as to whether to continue the development of a Universal Application System.”

Background cont.

OP 47: "Pacific Gas and Electric Company, Southern California Edison Company, Southern California Gas Company and San Diego Gas & Electric Company **must file a joint advice letter requesting a fund shift from another budget category**, such as marketing, education, outreach, if the Universal Application System's working group report recommends developing a Universal Application System or connecting with an existing Universal Application System's effort."

OP 48: Energy Division **may submit its own resolution to the Commission** for consideration of developing a new Universal Application System or integrating with an existing Universal Application System and the necessary budget for that purpose if there is 1) low working group participation, 2) inadequate public participation, 3) no consensus or near consensus recommendation from the Universal Application System Working Group, or 4) if the Energy Division believes further consideration of the options is appropriate.

Activities

SWG Activity Type
Weekly and Bi-Weekly Virtual Meetings
Literature Review
Presentations

- Recurring virtual meetings with presentations, homework review, and open discussions.
- The initial literature review provided the SWG with a broad view of existing application systems across the country.
- Presentations by various SMEs to the SWG gave insight to the current application systems, as well as experiences, opportunities, challenges, perspectives, and best practices.

Tasks

SWG Task Type
UAS SWG “Homeworks”
1 x 1 Meetings
Exit Survey

- “Homeworks” assigned to the SWG assisted in answering the list of questions posed by the Decision.
- 1x1 meetings each SWG member and IOUs allowed for more nuanced discussion that perhaps would not fit the larger SWG meeting stage.
- An anonymous exist survey allowed the SWG to evaluate the effectiveness of the sessions and increase confidence that the final report would be an accurate reflection of discussions, opinions, and recommendations of the SWG.

Recommendations

Recommendation 1 (Initial Phase): Continue to pursue UAS in Three Ways

- » The SWG recommends continuing the development of a successful UAS. This could be done in three early-stage tasks: leverage California Department of Social Services (CDSS) efforts, determine the scope of UAS, and develop Request for Information (RFI) scope.
 - The CDSS’s Statewide Verification Hub (SVH) is a 3-year information technology (IT) solutions project, launching July 2024, with the goal of simplifying customer eligibility and enrollment for the low-income sector. The UAS can work in conjunction with this effort.
 - Performing a thorough RFI to allow the continuation of the feasibility assessment and evaluation of the UAS.

Recommendation 2 (Initial Phase): Program Integration in Addition to CARE, FERA, and ESA

- » The SWG recommends the following categories of programs and references be included at launch to provide customers with better value and create early adoption with momentum.

IOU Administered Programs (Integrations)	Non-IOU Administered Programs (Lead Generation)	Information
<ul style="list-style-type: none"> • CARE, FERA, ESA • Bill Arrearage • Resiliency • Multi-Family Central Portal 	<ul style="list-style-type: none"> • CSD Programs – LIHEAP, LIHWAP, LIWP • CARB Access Clean California Tool 	<ul style="list-style-type: none"> • Health and Safety Information – PSPS, wildfire & safety, air quality, and drought information • Tribal Contact List

Recommendations Cont.

Recommendation 3 (Initial Phase): Additional UAS Technical Features

- » Single-Application for multiple programs
- » Support multiple registration pathways (i.e., online, in-person, by phone, text, or email)
- » Support homeowners, renters, building managers/owners on behalf of the tenants
- » Support data sharing of application information and energy usage information with program partners, clean-energy program administrators, and other implementers

Recommendation 4 (Initial Phase): Involve Stakeholders During UAS Development

- » The UAS SWG discussed the value of having continued involvement from non-IOU and non-ED stakeholders during the UAS development stages.
- » The involvement can be from:
 - New stakeholders or current UAS SWG subject matter experts (SMEs)
 - Public participants
 - Utility customers

Recommendations Cont.

Recommendation 5 (Subsequent Phase): Integrate Other Low-Income and Clean Energy Programs as Much as Possible

- » The final recommendation from the SWG is a later-term effort. Once all the initial phase recommendations have been successfully addressed, the last recommendation is to integrate the system with other low-income and clean energy programs as much as possible. The attached table shows *other* low-income and clean energy programs which require deeper analysis for system integration in the Subsequent Phase of the UAS development.

IOU Administered Clean Energy Programs	CPUC Administered Low Income Programs	CSD Administered Low Income Programs	CARB Administered Low Income Programs
Disadvantaged Communities Green Tariff (DAC-GT)	California LifeLine	Low-Income Home Energy Assistance Program (LIHEAP)	Clean Vehicle Assistance Project
Community Solar Green Tariff (CSGT)		CA Low-Income Household Water Assistance Program (LIWP)	Clean Cars 4 All
Solar on Multifamily Affordable Housing (SOMAH)		Low-Income Household Water Assistance Program (LIHWAP)	Clean Vehicles Rebate Project
Self-Generation Incentive Program (SGIP)			
Disadvantaged Communities Single-Family Solar Homes (DAC-SASH)			

New Findings

- » BenefitsCal and CalSAWS
 - Application system intended to be the primary users of CDSS SVH
- » SB 1208 (Hueso)
 - Calls for a UAS. Monitoring progress.
- » Differing interpretation on Decision language regarding UAS future scope.

The screenshot shows the BenefitsCal website. At the top, there is a navigation bar with the BenefitsCal logo, links for Home, Apply For Benefits, Programs, and Help, a language dropdown set to English, and a Log In button. Below the navigation bar, there is a date stamp '04/27/2022' and a message for 'LA County users' asking them to create a new account. The main content area features a large blue banner with the text 'Welcome to BenefitsCal.' and a sub-header 'Here you can apply for Medi-Cal, CalFresh and CalWORKs.' Below this, there are two buttons: 'Apply Now' and 'See If You Qualify'. To the right of the banner is an image of a family. Below the banner, there is a section titled 'What programs are available?' with a sub-header 'Great question. Find the programs that are right for you and your family.' This section contains four program cards: 'Food' (with an image of vegetables), 'Cash Aid' (with an image of a man and a child at a sink), 'Health Coverage' (with an image of a stethoscope), and 'Other Resources' (with an image of a child). Each card includes a brief description and a 'Learn more' link.

Next Steps

- » Moving forward UAS development team should utilize the regularly scheduled ESA Working Group meetings for updates and stakeholder engagement.
 - Next ESA WG Meeting on July 28
- » Reconnect with CDSS
 - Ensure SVH development includes qualification criteria for LI programs
 - Further evaluate CalSAWS as UAS option
- » Fundshift Tier-2 Advice Letter (OP 47)
- » Energy Division resolution, if necessary (OP 48)

Q&A

The final report can be found at:
<https://pda.energydataweb.com/>

Thank you



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