



Rule 22.1  
SWITCHING EXEMPTION GUIDELINES

Sheet 1

The following terms and conditions apply to both Southern California Edison (SCE) customers and electric energy service providers (ESP) who participate in Direct Access (DA) as defined by Rule 22. The following Rule implements 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, D.10-03-022 and D.19-05-043, Decision Regarding Increased Limits For Direct Access Transactions, which adopted guidelines regarding the rights and obligations of non-residential bundled service customers to switch to DA Service, and 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, and 3) Direct Access Enrollment Process, (4) Direct Access Load Cap and (5) 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. (N)

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

Customers switching 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 SCE six (6) months in advance of their intent to switch to Direct Access. Customers switching to Bundled Service (with the exception of Transitional Bundled Service described in Section A of this Rule) shall notify SCE six (6) months in advance of their intent to return to Bundled Service. (T)(N) (N) (C) (N)

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 as provided in this Rule or Rule 22 Section Q.
2. The TBS provision is limited to a 60-day period. The 60-day period begins on the day DA Service is disconnected which is the day SCE starts supplying power to the service account (day 1). By no later than the end of the 60-day period (day 60 of SCE supplying power), SCE must be in receipt of a Direct Access Service Request (DASR) from the customer's new ESP to switch the account to DA. In addition to meeting the DASR provisions set forth in Rule 22 Section E, DASRs to switch the account back to DA Service must comply with the following special conditions:
  - a. Accepted DASRs that do not require a meter change will be processed based on normal DASR processing timeframes as defined in Rule 22, Section E. SCE will include the TBS requirement with the DASR 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.

(L)

(Continued)

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(Continued)

A. Transitional Bundled Service (Continued)

2. The TBS provision is limited to a 60-day period (Continued)

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

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

3. Except for Customers receiving CCA Service, 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 an eighteen (18) month minimum period, subject to the conditions set forth in Section B of this Tariff. Such a default initiates the six month notice of return to Bundled Service which is not subject to cancellation. During this six month period, the account will be subject to the pricing conditions established in Section A.4. SCE will notify the customer within 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. (C)

4. Customers electing the TBS option will 1) be subject to transitional bundled commodity pricing, as defined in Schedule PC-TBS, 2) be subject to the provisions and applicable charges of the Direct Access Cost Responsibility Surcharge (DA-CRS) as defined in Schedule DA-CRS and 3) be ineligible to receive DA Revenue Cycle Services Credits as defined in Schedule DA-RCSC with the exception of the meter ownership credit, if applicable.

5. DA Customers electing TBS may continue to use the same meter provided it is compatible with SCE's meter reading system. Incompatible meters will be replaced by SCE with a meter that meets the customer's applicable tariff requirements, unless SCE has the capability to do a special read for a fee or the customer and SCE can agree on an alternative arrangement. Special metering requirements while receiving TBS will be subject to costs as set forth in Schedules CC-DSF and ESP-DSF.

6. Customers returning to DA Service at the conclusion of their TBS term will retain their continuous DA status associated with Schedule DA-CRS, if applicable.

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B. Bundled Portfolio Service

1. This service option is effective February 19, 2004 and is applicable to all Customers (C) 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 SCE's Bundled Portfolio Service (BPS). The following conditions will apply:
  - a. Customers electing this service make an 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-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-month advance notice to SCE prior to becoming eligible for BPS so SCE can adjust its procurement activity to accommodate the additional load. Such notification will be made by the customer submitting the Customer Advanced Notification Form in writing or electronically. SCE will provide the customer written confirmation and necessary switching process information within twenty (20) business days of receipt of the customer's notification. Once received by SCE, customers will have a three business-day rescission period after which advance notifications cannot be canceled. SCE will process requests to receive BPS in the following manner:
    - (1) Account transfers to BPS will be switched on the customer's next scheduled meter read date after the completion of the six-month advance notice period. For service accounts with meters that are incompatible with SCE's meter reading system as set forth in Rule 22, SCE will replace the incompatible meter with a meter that is acceptable to SCE. Such metering service will be done at the expense of the customer in accordance with Schedule CC-DSF.
    - (2) SCE will initiate a DASR to transfer the account to BPS and will provide notification to the customer and ESP in accordance with Rule 22, Section E.7.

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(Continued)

B. Bundled Portfolio Service

1. This service option is applicable to DA customers...(Continued)

- c. During the six-month advance notice period before becoming eligible for BPS, customers may continue on DA Service, switch to CCA service, if applicable, or return to Bundled Service and receive TBS pricing terms as set forth in Section A.4. of this Rule. SCE will process any DASR returning the customer to Bundled Service during the six-month advance notice period in accordance with Rule 22 and will provide Bundled Service to the customer at the TBS rate for the remainder, if any, of the six-month advance notice period. SCE will initiate the necessary transfer of the account to BPS at the conclusion of the six-month advance notice period with notification to the customer. The metering requirements of Section B.1.(b)(1) above will apply to such returns during the six-month advance notice period. Customers electing to receive TBS from SCE anytime during the six-month advance notice period (i.e., before the commencement of BPS Service) cannot return to DA Service. (C)  
(T)
- d. Customers returning to DA Service at the conclusion of their BPS term will retain their continuous DA status associated with Schedule DA-CRS, if applicable. DA customers continue to be responsible for DA-CRS under-collections and subject to the terms of Schedule DA-CRS.

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)

DA Service

- 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 months advance notice. Customers must provide SCE a six-month advance notice to SCE prior to becoming eligible for DA Service so SCE 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 14-793) as specified on SCE'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. 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 SCE will be time and date stamped by SCE to determine precedence. Once received by SCE, customers will have a three business-day rescission period after which advance notifications cannot be cancelled. SCE will provide the customer written confirmation and necessary switching process information within 30 business days of receipt of the customer's notification, including the final date for SCE to be in receipt of a DASR to return to DA Service. The customer is responsible for providing its ESP with this information. (T)

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B. Bundled Portfolio Service (Continued)

2. At the end of the customer's eighteen (18) month... (Continued)

a. (Continued)

(1) The customer's ESP shall submit a DASR to ensure the necessary switch to DA Service under DA switching rules occurs on the service account's next scheduled meter read date after the completion of the six-month advance notice period. Meter changes must be completed in accordance with Section A.2. of this Rule. (T)

(2) For a Bundled Service Customer, if SCE is not in receipt of a DASR by the final date specified in the SCE'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 SCE 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 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. (C)

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. DA Service DA Service If a residential DA customer returns to Bundled Portfolio Service, the customer shall not be permitted to switch back to DA Service. (D)

(D)

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- C. Direct Access Enrollment Process (T)  
The following describes the enrollment process: (C)
1. DA customers or their authorized agent may submit Six-Month Notices via e-mail or fax 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 Load 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: (T) (C)
    - 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 Taxpayer Identification (FTI) or other SCE 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 SCE of such deficiency, customers or their authorized agent shall have five (5) business days to correct the deficient Six-Month Notice.
    - 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).
  2. Upon SCE's receipt of each Six-Month Notice, SCE 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.

(Continued)

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C. Direct Access Enrollment Process (Continued)

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 SCE 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 SCE's determination of ineligibility is in error, the party will have five (5) business days to dispute the SCE's determination, upon which SCE will review its determination and advise the submitter of the information required to resolve the dispute.
4. SCE 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 SCE 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, SCE 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.
8. Within ten (10) business days, following the thirty (30) day review period, 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.
9. On the last business day of each calendar year, all Six-Month Notices on the Wait List will be cancelled and superseded by the following year's Wait List, except for the conditions described in Section E.

(Continued)

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(Continued)

- C. Direct Access Enrollment Process (Continued) (T)
10. On a monthly basis, SCE 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: (T) (C)
- a. If the available space under the Overall DA Cap is sufficient to accommodate all of the customer's Wait-Listed service accounts, SCE 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 SCE 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. SCE will then notify the next eligible customer on the Wait List. (T)
- 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, the IOU 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 the 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.
11. Between Submission Periods, SCE 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. (N) | (N)

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(Continued)

## D. Direct Access Load Cap

1. SCE is authorized to expand its DA load by 1,746,866,759 kWh (DA Expansion Load) pursuant to D. 19-05-043. The DA Expansion Load will increase SCE's current maximum DA Cap from 11,710,000,000 kilowatt-hours (kWh) to a maximum of 13,456,866,759 kilowatt-hours (kWh) for SCE's service territory (Overall DA Cap), as defined per D.19-05-043, Table 1, Authorized DA Cap Increase by Service Territory (in kWh). Effective on January 1, 2021, SCE will begin to switch the eligible customers to DA as described in Section E below. DA Expansion Load shall be allocated equally to the customers on the 2019 and 2020 waitlists as follows:
  - a. Available DA Expansion Load for 2019 Wait List Customers – 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). Fifty (50) percent of the New DA Load Allowance, or 873,433,379.5 kWh shall be allocated to the 2019 Wait List Customers.
  - b. Available DA Expansion Load for 2020 Wait List Customers – Customers who had participated in the 2019 Submission Period, as described in Section C, above, but adjusted by the schedule described in Section E. 1. below, and were placed on the wait list that is effective for 2020 (2020 Wait List). Fifty (50) percent of the New DA Load Allowance, or 873,433,379.5 kWh shall be allocated to the 2020 Wait List Customers.
2. For space that becomes available under the pre-SB 237 DA Allocation cap, SCE will continue to enroll load pursuant to the existing DA lottery process set forth in Section C.
3. Pursuant to D.19-05-043, 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 exception enrollment process of the DA Expansion Load during the Limited Expansion Window Period.

1. Enrollment Process and Schedule: The Direct Access (DA) enrollment schedule to enroll 2019 Wait List and 2020 Wait List Customers in the Limited DA Expansion Window is as follows:
  - a. For 2020 Wait List, the deadline for customers to submit a Notice of Intent (NOI) using SCE Form 14-763, Six-Month Advance Notice to Transfer a Non-Residential Account to Direct Access Service, to participate in the DA expansion is June 14, 2019;
  - b. By July 29, 2019, SCE shall complete its review, audit and confirmation of the NOI for the 2020 Wait List;
  - c. By August 12, 2019, SCE shall notify the eligible 2019 Wait List and 2020 Wait List customers in SCE service territory that they may enroll in the DA Service and direct these customers to submit their decisions regarding DA Service to SCE on or before September 3, 2019, at 5:00 p.m.;
  - d. If a notified customer declines the DA Expansion Load offering opportunity or fails to submit the decision to enroll in DA Service by the deadline, SCE shall notify the next eligible customer in queue for SCE service territory, and direct these customers to submit their decision regarding DA Service to SCE within fifteen (15) business days of such notification;
  - e. If a notified customer declines the DA Expansion Load offering opportunity or fails to submit the decision to enroll in DA Service by the deadline, the customer's NOI will be cancelled, and the customer will continue to receive service from the customer's current Load Service Entity (LSE). Such a customer will be removed from the 2019 Wait List or 2020 Wait List, whichever is applicable.

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E. Limited Expansion Window Period (Continued)

1. Enrollment Process and Schedule (Continued):

- f. If a customer who is eligible to enroll in DA Service from the 2019 Wait List declines the opportunity to take DA Service by December 31, 2019, at 11:59 p.m., SCE shall use the 2019 Wait List to reallocate that customer's load. If the available DA Expansion Load is not sufficient to accommodate all of the customer's service accounts on the 2019 Wait List, SCE will work with the customer to determine which service accounts to be switched. Should the customer decline to accept the load offered, the customer's NOI will be cancelled and the customer will be removed from 2019 Wait List and remain on Bundled Service or Community Choice Aggregation Service, if applicable. SCE will then notify the next eligible customer on the 2019 Wait List;
- g. If a customer who is eligible to enroll in DA Service from the 2019 Wait List declines the opportunity to take DA Service after December 31, 2019, at 11:59 p.m., SCE shall use the 2020 Wait List to reallocate that customer's load to the next customer on the 2020 Wait List. If the available DA Expansion Load is not sufficient to accommodate all of the customer's service accounts on the 2020 Wait List, SCE will work with the customer to determine which service accounts to be switched. Should the customer decline to accept the load offered, the customer's NOI will be cancelled and the customer will be removed from 2020 Wait List and remain on Bundled Service or Community Choice Aggregation Service, if applicable. SCE will then notify the next eligible customer on the 2020 Wait List;
- h. Notified customers who chose to switch to the DA Service must select an Energy Service Provider (ESP) and have that ESP submit the Direct Access Service Request form to SCE no later than 5:00 p.m. on February 3, 2020. Any customer under the DA Expansion Load for 2019 or 2020 with DASR submitted and accepted by SCE after February 3, 2020 will not be switched until 2022.
- i. If a customer who is offered and accepted DA Expansion Load fails to submit a DASR by the DASR Due Date, the customer's NOI will be cancelled, and the customer will continue to receive service from the customer's current Load Service Entity (LSE). Such a customer will be removed from the 2019 Wait List or 2020 Wait List, whichever is applicable. For these customers, the provisions stated in the NOI, Form 14-793, regarding the (1) transfer to Schedule PC-TBS for a sixty (60)-day period, (2) continuance onto the six-month transitional period under Schedule PC-TBS, and (3) eighteen (18)-month commitment period on Bundled BPS as prescribed on the NOI will not apply.
- j. Any load under the DA Expansion Load cap that is unallocated, declined, or unclaimed timely by the 2019 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. 2021 Wait List customers will be switched in 2022.

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(Continued)

E. Limited Expansion Window Period (Continued)

2. Load Data Sharing Schedule with Community Choice Aggregators (CCAs):

- a. By September 10, 2019, SCE shall provide to each affected CCA a preliminary report of the aggregate hourly peak demand and hourly load data for the latest entire year to date of 2019 and 2020 Wait List customers who chose to switch from that CCA's service to the Direct Access program. A final report shall be provided to each affected CCA by February 10, 2020.
- b. By February 10, 2020, SCE shall 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 Wait List customers who have submitted Direct Access Service Request forms.

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