**Pacific Gas and Electric Company**

**2016 Business Energy Solutions**

**Time Keeping Guidelines**

Version 1.2  
March 5, 2016

**Table of Contents**

[Business Energy Solutions 1](#_Toc444923827)

[CEE (Balancing Account) 3](#_Toc444923828)

[On-Bill Financing (OBF) (Balancing Account) 4](#_Toc444923829)

[Demand Response (DR) (Balancing Account) 4](#_Toc444923830)

[Non- Balancing Work (Prg IV) 5](#_Toc444923831)

[Peak Day Pricing (PDP) 5](#_Toc444923832)

[Solar Choice 5](#_Toc444923833)

[Time-Varying Pricing 6](#_Toc444923834)

[Storms 6](#_Toc444923835)

[Unique Situations 7](#_Toc444923836)

[BES Leadership & Administrative Assistant Charging Guidelines 8](#_Toc444923837)

# Business Energy Solutions

Business Energy Solutions (BES) uses **PG&E @ Work for Me Time Entry Application** to charge time against the various programs and initiatives the department is involved in. It is structured by Activity Type, Order Number and Type. This document serves as timekeeping governance for BES in addition to the Web Training Course **TIME-0005WBT (Self-Service Time Entry and Approval)** in My Learning. Nearly all of the timekeeping categories described in this document apply to BES; although there may be some minor differences within your area.

BES is divided into 3 groups: Large Enterprise Energy Solutions, SMB Energy Solutions, and Business Customer Success. Each group has their own orders.

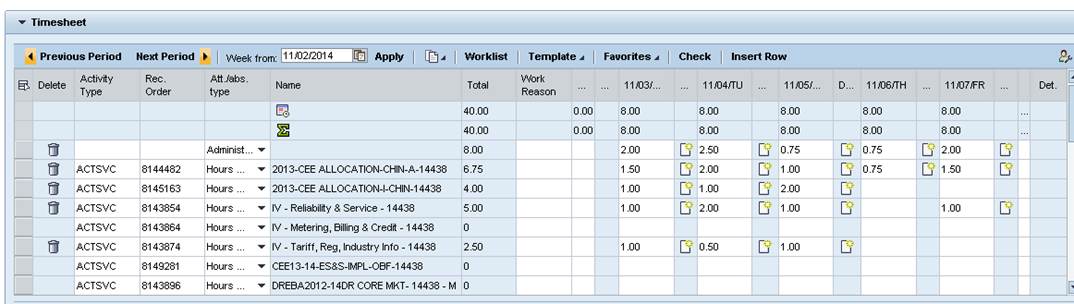
**Table 1 – Order Structure**

|  |  |  |
| --- | --- | --- |
| **Work Type** | **Attendance / Absence Type** | **Notes** |
| **Non-Billable** | Non-Billable Employee - 1036 | For Supervisor/Managers/Directors/Admins ONLY |
| Administration - 1022 | * General administrative tasks * Reading general email * Time entry * Staff meetings in general (unless it is broken out by productive categories) * Attending personal development trainings not related to a specific program * Participation in safety meetings and activities * Participation in PG&E sanctioned event where no PG&E business topics are discussed or presented (e.g. volunteering at Food Bank) |
| **Productive** | Hours Worked - 1000 | Customer Energy Efficiency (CEE) - See page 3 |
| On-Bill Financing (OBF) - See page 4 |
| DR / Ld Mgt - See page 4 |
| Non-Balancing Work (Prg IV) - See page 5 |
| Time-Varying Pricing - See page 6 |
| Pipeline Pathways - See page 6 |
| Storms - See page 7 |
| **Non-Productive** | Safety |  |
| Floating Holiday |  |
| Company Holiday - Paid |  |
| Sick Relative |  |
| Sick |  |
| Vacation |  |
| Vacation Buy |  |
| Funeral |  |
| Industrial Injury |  |
| Jury Duty |  |
| Time Off w/ perm w/o pay |  |
| Time Off w/o perm w/o pay |  |
| Military Leave |  |
| Time Off w/ perm w/ pay |  |

**IMPORTANT:** The “Non-Billable Employee” attendance type \*Non-Billable Employee – 1036) is EXCLUSIVELY for the use of Directors, Managers, Supervisors and Administrative Assistants. All other team members shall use the attendance types listed above.

**Figure 1 - PG&E @ Work for Me Time Entry Application**

**Activity Type, Receiving Order Number, Attendance/Absence Type, Hours.**



# CEE (Balancing Account)

Customers contribute to the Public Purpose Program (PPP) charge on their monthly bills, and this is the money that funds the balancing account. Customer Energy Efficiency (CEE) is a significant portion of the PPP charge.

**Table 2 – CEE Work Categories**

|  |  |  |  |
| --- | --- | --- | --- |
| **Order Name** | **Description** | **Who should use it?** | **Notes** |
| CEE Allocation – Implementation | Any direct interaction with customers | CRMs, SAMs & CSMs | Non-CRM/account reps employees can use this category if they have direct interaction with customers |
| Customer touches |
| Energy Audits |
| Training and education for CEE product and program offerings provided by CEE program administrators (Core, 3P, GP, etc.) | Anyone receiving program specific training | Does NOT include personal development training (sales training, skills courses, etc.) |
| Travel-related costs (labor, fees, lodging, and travel) for the trainings referenced above and for any internal Energy Efficiency related meetings (quarterly meetings, strategy meetings) | CRMs, SAMs & CSMs |  |
| Sales Strategy and Planning Meetings | CRMs, SAMs & CSMs |  |
| CEE Allocation - Administration | Travel-related costs (labor, fees, lodging, travel) for attending national events with energy efficiency themes (ACEEE, EEI) | CRMs, SAMs & CSMs |  |

# On-Bill Financing (OBF) (Balancing Account)

OBF is a financing program that issues 0% interest, zero penalty loans for installation of qualifying EE measures. OBF serves as an enhancement to PG&E’s existing rebate and/or incentive programs. BES supports this program with two work categories: OBF Implementation and OBF Marketing.

**Table 3 – OBF Work Categories**

|  |  |
| --- | --- |
| **Order Name** | **Task** |
| CEE OBF - Implementation | Assisting a customer with the completion of the Payment History Review Template |
| Reviewing and providing the Payment History Review Template to the OBF Program |
| Collection, completion, review and submission of application package materials required for Pre-Field Review |
| Review, execution and submission of Loan Agreement |
| Collection, completion, and submission of application package materials required for Post-Field Review |
| Execution and submission of Loan Modification Agreement |
| Miscellaneous application questions and inquiries |
| Troubleshooting causes of failed payment screen |
| Coordinating between the customer/vendor/OBF |
| CEE OBF - Marketing | Delivering OBF Presentations to potential customers and/or Implementers |
| Meeting and discussions for OBF offerings with customers |
| Miscellaneous program inquiries |

# Demand Response (DR) (Balancing Account)

PG&E's Demand Response programs are designed to enable customers to contribute to energy load reduction during times of peak demand. DR programs offer incentives to businesses that reduce the energy use of their facilities during times of peak demand.

**Table 4 – DR Work Categories**

|  |  |
| --- | --- |
| **Order Name** | **Task** |
| DREBA15-16-CORMK-10847-CHIN-ES&S | Interaction with customers as it relates to DR programs |
| DREBA15-16-CORET-10847-CHIN-ES&S | Participation or attendance of DR training and education |

# Non- Balancing Work (Prg IV)

Non-Balancing work includes all electric/gas service work with our existing customers, not the sales (Energy Efficiency) aspect of dealing with customers. It is funded by the General Rate Case (GRC).

**Table 5 – Non-Bal Work Categories**

|  |  |
| --- | --- |
| **Order Name** | **Task** |
| IV Metering Billing Credit (LCIA & SMB) | Time spent on resolving Billing/Credit, and Metering issues |
| IV Rates Rules Contracts (LCIA & SMB) | Customer interaction relating to Rates, Rules, Contracts, Tariffs |
| IV Reliability & Svc (LCIA & SMB) | Any time spent on electric/gas service related activities like: outages, service planning, etc. Reliability is the most common Non-Bal Work Category |
| Svc Plan/Elec Gen Interconnect | Time spent on service planning issues specific to customers that generate electricity |
| BES START Team - SBUA | Time spent on outreach to SMB customer with newly started services. To be used by the START Team |

# Peak Day Pricing (PDP)

**Table 6 – Peak Day Pricing Work Categories**

|  |  |
| --- | --- |
| **Order Name** | **Task** |
| DPMA - PDP Field (LCIA & SMB) | Time spent supporting PDP activities |

# Solar Choice

**Table 7 – Peak Day Pricing Work Categories**

|  |  |
| --- | --- |
| **Order Name** | **Task** |
| Solar Choice | Time spent supporting Solar Choice program activities |

# Time-Varying Pricing

As part of a plan by the California Public Utilities Commission to ensure greater power reliability and a better energy future, businesses are transitioning to a Time-Varying Pricing electric rate structure. Many customers have already made this transition, with more to come in the future.  These include: Large Agriculture, Large Commercial / Industrial, Small / Medium Business, as well as Small / Medium Agriculture Customers.

**Only customer-facing interactions should be charged to TVP**

* Non customer-facing personnel (local support, administrators, etc.) will not charge any time to TVP
* Employee expenses (mileage, meals, lodging, etc.) will not be allocated to TVP

**Only identified ‘Most Impacted’ educations should be charged to TVP**

* Customer-facing employees will only charge to a TVP order number when working toward an identified ‘Most Impacted’ education
* This includes preparation time directly related to a specific customer interaction (EI research, Tableau, etc.)

**Ongoing PDP and TOU activities will be charged to appropriate, existing order numbers**

* Ongoing BES TVP activities (PDP notifications, Customer-Facing Events, BLT reporting, etc.) will continue
  + Charging for these activities will use appropriate order numbers such as Non-Bal Rates, DR, Energy Efficiency, and others.
* Ongoing TVP Specialist activities will continue to be charged to the designated order numbers

# Storms

BES supports Major Events (Storms, etc.) by providing assistance to Electric Operations at the Region Emergency Centers (REC) and Operations Emergency Centers (OEC). The REC/OEC Incident Commander or your supervisor will provide order numbers to use for your time. Each storm will have unique orders. These orders are to be used only for time spent in the REC/OEC. Storm support performed from other locations will be charged to IV - RELIABILITY & SERVICE.

# Unique Situations

**Table 8 – Unique Situation Charging Guidance**

|  |  |
| --- | --- |
| **Situation** | **Guidelines:** |
| You are driving after hours to another location for a meeting that will take place the following day | Charge out the after-hours drive time to the same ratio of order numbers you used for the meeting itself, but use the “administrative” attendance type |
| You work a very long day and your supervisor approves you to leave a small amount earlier on the following day or another day within that same week | Charge the extra hours to the order number you were working on. On the short day, charge your actual hours worked (even if less than 8 hours) |
| You work on-call duties in the middle of the night but don’t report to the EOC for a storm | Charge those hours to reliability |
| You work EOC duties for a storm due to a request to report to the EOC | Charge to the order number given for the storm |
| You work a community event on a weekend or after hours | Charge to the Community Education & Outreach |
| You are on an RDO schedule and there is a holiday that day | Be sure to add in one hour of “floating holiday” to the normal holiday to get to the required 9 hours for that day |
| You want to do a one-time switch of your RDO to another week | You need the timekeeper to do a temporary schedule change in CATS |
| You are authorized to charge overtime for Storm activities where you were physically located in the OEC or REC. This starts at 2 hours past your scheduled work day (i.e. overtime would be everything past 10 hours on an 8 hour day, or everything past 2 hours on a holiday or weekend) | Enter the storm order number given into SAP the receiving column, “4” in the work reason column for “overtime at standard rate”, “hours worked” in the activity type column, and “0005” in the Operation Column (you may have to add some of these columns back into SAP to be visible if your removed them in your template) |

# BES Leadership & Administrative Assistant Charging Guidelines

**ADMINS:** All administrative assistants should charge their time to “Non-billable employee” attendance type or other standard exceptions (Sick, Holiday, etc.).

**SUPERVISORS, MANAGERS and DIRECTORS:** All time should be charged to “Non-billable employee” or other standard exceptions (Sick, Holiday, etc.). The following additional exceptions should be used:

**Table 9 – Supervisor/Manager/Director Unique Situation Charging Guidelines**

|  |  |
| --- | --- |
| **Situation** | **Guideline:** |
| You work EOC duties for a storm due to a request to report to the EOC or REC | Charge to the Storm order number associated with that storm |
| You work a community event that none of your employees attend | Charge to the Community Education & Outreach order |
| You are brought in to work on a special project or issue with a special order number that wouldn’t be appropriately distributed in the right ratio amongst your employees | Charge to that order number |