



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, 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. D.03-05-034, D.10-03-022, and D.11-12-018 established provisions for eligible DA Customers regarding: 1) Transitional Bundled Service, 2) Bundled Portfolio Service, and 3) 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. (T) (N) (N) (T)

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 advance 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 (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.

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.
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.
 - 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.
 - 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 DASR 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.

(Continued)

(To be inserted by utility)
Advice 2678-E
Decision 11-12-018

Issued by
Akbar Jazayeri
Vice President

(To be inserted by Cal. PUC)
Date Filed Dec 22, 2011
Effective Jan 1, 2012
Resolution _____



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A. Transitional Bundled Service (Continued)

- 3. Accounts failing to meet the time limitations and DASR 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.

(Continued)

(To be inserted by utility)
Advice 2678-E
Decision 11-12-018

Issued by
Akbar Jazayeri
Vice President

(To be inserted by Cal. PUC)
Date Filed Dec 22, 2011
Effective Jan 1, 2012
Resolution _____

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B. Bundled Portfolio Service

1. This service option is effective February 19, 2004 and is applicable to all DA-eligible Customers who return to Bundled Service for a minimum of eighteen (18) months. (C)
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: (C)
 - 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. With the exception of the one-time temporary waiver granted during the Open Enrollment Window described in Section D.4 below, no premature departures from the eighteen (18) month commitment will be allowed. (C)
 - 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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(To be inserted by utility)

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Vice President

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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 either continue on DA service or return to Bundled Service and receive TBS pricing terms as set forth in Section A.4. of this Tariff. 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.
- 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 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 accounts to DA service under the provisions of Section C, below, or remain on Bundled Service. SCE will provide the customer with a courtesy reminder eight months before the expiration of the customer's eighteen (18) month BPS commitment. If for any reason the customer is not sent, or does not receive, a courtesy reminder from SCE, the customer is not relieved of its responsibility for providing SCE the notice required in Section B.2(a) below. (C)

- 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 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. (C)

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(To be inserted by utility)

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B. Bundled Portfolio Service (Continued)

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

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 Tariff.

(2) 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. However, Residential Customer previously classified as DA-eligible that submitted a six-month advance 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.

(Continued)

(To be inserted by utility)
Advice 2678-E
Decision 11-12-018

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Vice President

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Effective Jan 1, 2012
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C. Phase-in Period (Continued)

4. Enrollments During the OEW (Continued)

b. Enrollment during the OEW will be as follows: (Continued)

- (8) The customer will have 60 calendar days from the date of SCE'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 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 SCE receives the DASR. Although Rule 22.E.18 allows SCE, the customer and ESP to mutually agree to a different service change date for the service changes requested in the DASR, SCE may be unable to accommodate special service change dates during the OEW. Nothing in this Section D 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 SCE 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 records 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 NOIs accepted during the OEW.
- (11) If the 2010 Load Cap is reached during the OEW, SCE 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 SCE's determination of any room becoming available, SCE will notify eligible customers on the wait-list by email of the acceptance of their NOIs. SCE will continue to issue such email notices, on a one (1) business day basis as SCE determines that room is available during the OEW, through the last day of the OEW. A customer coming off the OEW wait-list will have 60 calendar days from the date of SCE's notice of the NOI acceptance is sent to cause its ESP to submit a DASR for each eligible service account to SCE. If a DASR is not received by SCE by the end of the 60 calendar day period, the customer's NOI for that service account will be void, and the exception under Section C.4.b(2) for the three-year BPS commitment will apply. The wait-list will be terminated 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 Advance 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)

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(To be inserted by utility)

Advice 2764-E

Decision _____

Issued by

Akbar Jazayeri

Vice President

(To be inserted by Cal. PUC)

Date Filed Aug 7, 2012

Effective Sep 6, 2012

Resolution _____