

Schedule No. G-CARE

Sheet 1

CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) PROGRAM

The italicized Sections of this Schedule are temporary, adopted on an interim basis, pursuant to Resolution M-4842.

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APPLICABILITY

This schedule provides a California Alternate Rates for Energy (CARE) discount to each of the following types of customers listed below that meets the requirements for CARE eligibility as defined in Rule No. 1, Definitions, and herein, and is taken in conjunction with the customer's otherwise applicable service schedule.

1. Customers residing in a permanent single-family accommodation, separately metered by the Utility.
2. Multi-family dwelling units and mobile home parks supplied through one meter on a single premises where the individual unit is submetered.
3. Non-profit group living facilities.
4. Agricultural employee housing facilities.

TERRITORY

Applicable throughout the service territory.

DISCOUNT

The qualified customer will receive a 20% CARE discount on all customer, commodity, and transportation charges on their otherwise applicable service schedule. In addition, the customer will not pay the CARE portion of the Public Purpose Programs Surcharge as specified in Schedule No. G-PPPS.

The qualified customer shall also pay a discounted CARE Service Establishment Charge as specified in Rule No. 10, Service Charges, to establish or re-establish service each time an account is opened.

SPECIAL CONDITIONS

ALL CUSTOMERS

1. Applicable Conditions: All special conditions contained in the customer's otherwise applicable schedule are applicable to service under this schedule.
2. Application and Eligibility Declaration: An application and eligibility declaration, on a form authorized by the Commission, is required for service under the CARE program unless otherwise authorized by the Commission. Renewal of a customer's eligibility declaration, also referred to as recertification, is required at the request of the Utility.

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(Continued)

(TO BE INSERTED BY UTILITY)
 ADVICE LETTER NO. 5604-B
 DECISION NO.

ISSUED BY
Dan Skopec
 Vice President
 Regulatory Affairs

(TO BE INSERTED BY CAL. PUC)
 SUBMITTED May 22, 2020
 EFFECTIVE Mar 4, 2020
 RESOLUTION NO. M-4842

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CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) PROGRAM

(Continued)

SPECIAL CONDITIONS (Continued)

ALL CUSTOMERS (Continued)

3. Commencement of CARE Discount: Eligible customers shall begin receiving the CARE rate discount no later than one billing period after receipt of a completed and approved application by the Utility or as may be authorized by the Commission.

4. Eligibility: A customer can qualify for the CARE discount by meeting either of the two eligibility requirements shown below:

a. Income Eligibility: An income-qualified customer, submetered tenant, or facility resident has total annual gross household income from all sources that is no more than shown in the table below for the number of persons in the household. The combined income of all persons from all sources, both taxable and non-taxable, shall be no more than:

<u>Number of Persons In Household</u>	<u>Total Annual Household Income</u>
1-2	\$34,480
3	\$43,440
4	\$52,400
5	\$61,360
6	\$70,320
7	\$79,280
8	\$88,240

For households with more than eight persons, add \$8,960 annually for each additional person living in the household. The above income levels are subject to change annually by the Commission.

b. Categorical Eligibility: If the applicant or any person in the household receives benefits from any of the following programs: Medical/Medicaid; Medi-Cal for Families A&B; Women, Infants & Children Program (WIC); CalWORKs/Temporary Assistance for needy Families (TANF); Tribal TANF; Head Start income Eligible (Tribal Only); Bureau of Indian Affairs General Assistance; CalFresh (Food Stamps)/Nutrition Assistance Program (SNAP); National School Lunch Program (NSLP); Low-Income Home Energy Assistance Program (LIHEAP); and Supplemental Security Income (SSI).

The applicant for the CARE discount must be the Utility's customer of record or a submetered tenant of a Utility customer.

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CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) PROGRAM

(Continued)

SPECIAL CONDITIONS (Continued)

ALL CUSTOMERS (Continued)

4. Eligibility (Continued)

No customer, submetered tenant, or facility resident claimed on another person's income tax return shall be eligible for this rate.

5. Verification: Information provided by the customer to the Utility is subject to verification as authorized by the Commission. Refusal or failure to provide documentation of eligibility acceptable to the Utility, upon request, shall result in the denial or termination of the CARE discount.

Per SoCalGas Advice Letter 5604-B, submitted pursuant to Resolution M-4842, certain customer protections will be offered effective March 4, 2020 through April 16, 2021, or as modified by the Commission. Accordingly, the Utility shall suspend all CARE program removals and discontinue all recertification and verification requests that require customers to provide their current income information.

6. Backbilling: Customers may be backbilled under the applicable rate schedule for periods of ineligibility and/or if the direct benefits to a facility's residents claimed by the customer cannot be supported.

7. Customer Responsibility: It is the customer's responsibility to notify the Utility within 30 days if there is a change in eligibility status, except as specified for multi-family customers in Special Conditions 11 and 12 below.

8. Discount Calculation: The CARE discount of 20% shall be reflected through the use of separate line item on the bill stated as an overall discount to the otherwise calculated customer, commodity and transportation charges.

In addition to the Special Conditions above pertaining to all applicable customers, Special Conditions specific to each type of applicable customer are set forth below.

SINGLE FAMILY CUSTOMERS

9. Location Eligibility: Customers are only eligible to receive this rate at one residential location at any one time.

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CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) PROGRAM

(Continued)

SPECIAL CONDITIONS (Continued)

MULTI-FAMILY SUBMEYERED CUSTOMERS

10. Tenant Qualification: Submetered tenants, rather than the Utility's customer of record, qualify for CARE by completing an application and forwarding it to the Utility, and it is the tenant's responsibility to notify the Utility of a change in eligibility status.
11. Customer Responsibility: The Utility customer shall notify the Utility within 30 days following a reduction in the number of submetered units qualifying for the CARE rate as a result of unit(s) being vacated.
12. Location Eligibility: Eligible tenants can only receive this rate at one residential location at any one time.

NON-PROFIT GROUP LIVING FACILITY CUSTOMERS

13. Eligibility Criteria: In order for the customer to be eligible for the CARE discount, and to be considered a qualified non-profit group living facility, each of the following provisions must be met:
 - a. The facility must certify that it is one of the following: a homeless shelter, women's shelter, transitional housing, a short- or long-term care facility, or a group home for physically or mentally disabled persons.
13. Eligibility Criteria (Continued)
 - b. The facility must provide a copy of its IRS Nonprofit Tax ID Form No. 501(c)(3) and state business license, conditional use permit or other proof satisfactory to the Utility. Separately metered satellite facilities in the name of the licensed facility, where 70% of the energy supplied is for residential purposes, are also eligible.
 - c. With the exception of homeless shelters, all facilities must certify that 100% of the residents of the facility individually meet the CARE eligibility standard for a single-person household. A caregiver who lives in the facility is not a resident for purposes of determining eligibility. A single-person household is eligible for the CARE discount if total annual gross income does not exceed \$34,480.
 - d. With the exception of homeless shelters, all facilities must certify that they provide a "special needs" social service, such as meals, job development training, or rehabilitation programs, in addition to lodging for residents who qualify for the CARE discount.
 - e. Homeless shelters must certify that they provide at least six beds per day or night for a minimum of 180 days each year for persons who have no alternative residence.

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CALIFORNIA ALTERNATE RATES FOR ENERGY (CARE) PROGRAM

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(Continued)

SPECIAL CONDITIONS (Continued)

NON-PROFIT GROUP LIVING FACILITY CUSTOMERS (Continued)

13. Eligibility Criteria (Continued)

- f. The facility must certify that at least 70% of the energy supplied to the facility's premises is used for residential purposes.
 - g. Government-owned facilities are not considered qualified non-profit group living facilities, unless they are a qualified non-profit homeless shelter as defined above.
14. Certification of Benefits: At the time of annual renewal of eligibility, each facility is required to certify that monies saved through the CARE discount have benefited the residents of the facility who qualify for the CARE discount. Certification shall be made under penalty of perjury and include a quantification of funds saved annually due to the CARE discount, and identify how those funds have been spent for the benefit of the qualifying residents.

AGRICULTURAL EMPLOYEE HOUSING FACILITY CUSTOMERS

In conjunction with the Special Conditions applicable to all facilities covered under this schedule, certain Special Conditions, unique to migrant farmworker housing centers, privately owned employee housing or non-migrant housing for agricultural employees (operated by non-profit entities) collectively referred to as Agricultural Employee Housing Facilities, must be met as provided below. Special Conditions applicable to a specific type of facility are also described below.

15. Eligibility Criteria: The applicant for the CARE discount must be the Utility's customer of record. In addition, in order for the applicant to be considered as a qualified facility, the following provisions must be met:

a. Migrant Farmworker Housing Center

- (1) The facility must qualify as a migrant farmworker housing center pursuant to Section 50710.1(e) of the California Health and Safety Code, or non-profit farmworker center pursuant to subdivision (b) of Section 1140.4 of the California Labor Code, and is providing housing to migrant agricultural employees and has received an exemption from local property taxes pursuant to subdivision (g) of Section 214 of the Revenue and Taxation Code. Upon Utility request, the applicant shall provide a copy of the current contract with the Office of Migrant Services Department of Housing and Community Development of the State of California, or an unrevoked letter or ruling from the Internal Revenue Service (Code. Section 501 (c) (3) or the Franchise Tax Board indicating that the entity is exempt from income taxes. The non-profit applicant may also be asked to provide a copy of a letter from the Assessor in the county where the facility is located indicating that the housing is exempt from local property taxes.

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(Continued)

SPECIAL CONDITIONS (Continued)

AGRICULTURAL EMPLOYEE HOUSING FACILITY CUSTOMERS (Continued)

15. Eligibility Criteria (Continued)

a. Migrant Farmworker Housing Center (Continued)

- (2) Service accounts receiving the discount are residential end-use accounts.
- (3) The facility must use the savings from the reduction in energy rates to benefit the occupants.

b. Privately Owned Employee Housing

The facility qualifies as privately owned employee housing as defined in Section 17008 of the California Health and Safety Code, and is licensed and inspected by state or local agencies pursuant to Part 1 (commencing with Section 17000) of Division 13 of the Health and Safety Code. The applicant provides proof of current compliance with Part 1 of Division 13 of the Health and Safety Code or valid permit issued pursuant to Health and Safety Code Section 17030. Energy use in all facilities (100%) must be residential usage.

c. Non-Migrant Housing For Agricultural Employees (operated by non-profit entities)

The facility qualifies as housing for agricultural employees as defined in subdivision (b) of Section 1140.4 of the California Labor Code and has received an exemption from local property taxes pursuant to subdivision (g) of Section 214 of the Revenue and Taxation Code. The applicant provides proof of non-profit status by providing a copy of an unrevoked letter or ruling from the Internal Revenue Service (Code Section 501 (c) (3)) or the Franchise Tax Board indicating that the entity is exempt from income taxes. The applicant also provides a copy of a letter from the Assessor in the county where the facility is located indicating that the housing is exempt from local property taxes. Energy use in individually metered facilities must be 100% residential; for master metered facilities, at least 70% of the energy consumed on the CARE rate must be used for residential purposes.

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(Continued)

SPECIAL CONDITIONS (Continued)

AGRICULTURAL EMPLOYEE HOUSING FACILITY CUSTOMERS (Continued)

16. Determination of Income Eligibility: The applicant for the CARE discount shall determine that 100 percent of the Agricultural Employee Housing Facility's residents as defined in Special Condition 15.b and c above, qualify for the discount. The applicant certifies that the total annual gross income (both taxable and non-taxable) from all sources for each individual and/or household meets the income eligibility guidelines as set forth in Special Condition 4. Upon request by the Utility, the applicant shall provide proof of income eligibility (income tax returns, paycheck stubs or similar records) acceptable to the Utility. The applicant must retain all records for three years from the date of initial application and/or recertification for the CARE discount. Employees of the entity operating or managing the employee housing and who reside on the premises are not counted as residents for purposes of qualifying the facility for the CARE discount.
17. Certification of Benefits. For all Agricultural Employee Housing Facilities, as defined in Special Condition 15.b and c above, at the time of initial application for the CARE discount, the applicant must provide a description of how the discount will be used to directly benefit the occupants of the facility. During the annual recertification, the applicant shall be required to certify under penalty of perjury how the past year's discount directly benefited the occupants of the facility, and how the next year's discount is expected to be used to directly benefit the occupants. It is the responsibility of the applicant to maintain appropriate accounting entries, retain necessary supporting documents of how the CARE discount was used to benefit the occupants, and provide them to the Utility upon request. The applicant must retain all records for three years from the date of initial application and/or recertification for the CARE discount.

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