

**Rule 1**

**DEFINITIONS**

**Account:** A Utility-specific identifier for tracking the service it provides through one or more meters at a specific customer premise or location. One customer may have several accounts within the Utility's Service Territory.

**Aggregator:** Any entity who consolidates the loads of multiple End-Use Customers in facilitating the sale and purchase of electric energy, transmission and other services on behalf of those customers.

**Ancillary Services:** Those services that are necessary to support the transmission and distribution of capacity and energy from resources to loads while maintaining reliable operation of the transmission system, as deemed by the Utility, and in accordance with Good Utility Practice.

**Applicant:** A person or agency requesting the Utility to supply electric service or for changes in electric service. Electric service may consist of both energy and energy-related services.

**Application:** A request to the Utility for electric service; not an inquiry as to the availability or charges for such service. The form of the request shall be at the Utility's discretion.

**Baseline:** A rate structure mandated by the California Legislature and implemented at the Utility in 1984 that ensures all residential customers are provided a minimum necessary quantity, as defined by the Commission, of electricity at the lowest possible cost.

**Billing Cycle:** The regular interval at which a bill for electric service is rendered, typically spanning a 27-to-33 day period.

**Billing Demand:** The amount of energy drawn by the End-Use Customer at a specific time. The Billing Demand is the Demand on which the customer is to be billed in accordance with the terms and conditions of their applicable rate schedule.

**Billing Month:** The billing month is that period of time over which a customer is billed for services rendered during a particular billing cycle.

**Bundled Customer:** An End-Use Customer who receives its electric procurement and delivery services from the Utility. A Direct Access Customer is not a Bundled Customer. Sometimes referred to as a Utility Service Customer or Customer.

**Business Day:** A day on which the Utility's offices are open to conduct general business in California.



Advice Letter No. 28-E

Issued by  
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**DEFINITIONS**

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California Alternate Rates for Energy (CARE): A program for qualifying (See Preliminary Statement, Section 9) low-income Applicants that provides reduced energy charges to the following:

1. Individually metered Customers;
2. Master-metered customers with qualifying low-income submetered tenants;
3. Submetered tenants of master-metered Utility Customers;
4. Qualifying residents in individually metered Single Family Dwellings; and
5. Qualifying Nonprofit Group-living Facilities.

CARE Nonprofit Group-living Facility: A facility operated by a corporation that has received a letter of determination by the Internal Revenue Service that the corporation is tax exempt due to its nonprofit status under IRS Code Section 501 (c)(3). The facility must be one of the following:

1. A homeless shelter with 10 or more beds and open at least 180 days per year,
2. Transitional housing, such as a half-way house or drug rehabilitation facility;
3. Short- or long-term care facility, such as a hospice, nursing home, seniors' home, or children's home; or
4. A group home for physically or mentally disabled persons.

With the exception of homeless shelters, the nonprofit group-living facility must provide services such as meals or rehabilitation in addition to lodging. All of the residents of the facility must meet the LIRA eligibility standard for a single-person household. At least 70 percent of the electricity supplied to the facility's premises must be used for residential purposes, and the facility must be licensed by the appropriate state agency, with the exception of homeless shelters which must have the appropriate municipal or county conditional use permits.

Facilities such as student housing/dormitories are excluded.

For complete eligibility requirements see Preliminary Statement, Section 9.

Certified Electric Metering Agent: Any entity that is certified by the Utility to perform one or more of the following tasks including but not limited to: purchasing, installing, maintaining, testing and reading the End-Use Customer's meter(s) on behalf of the Energy Service Provider. The Metering Agent also assists the Energy Service Provider in the development or updating or population of the meter data database. Also referred to as the Meter Agent.

Certified Renewable Resource Provider: Any entity certified by the Commission who generates power using a renewable energy source. Renewable energy sources including those

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**DEFINITIONS**

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resources that are considered to be practically inexhaustible because their energy source is not limited (such as, hydro, solar, wind, bio-mass and ocean-wave).

Commercial or General Service: Service to Customers engaged in selling, warehousing, or distributing a product, in some business activity or in a profession or in some form of economic or social activity and for purposes that do not come directly under another classification of service.

Commercial Development: Two or more enterprises engaged in trade or the furnishing of services, (e.g., shopping centers, sales enterprises, business offices, professional offices, and educational or governmental complexes) and located on a single parcel or on two or more contiguous parcels of land.

Commission: The Public Utilities Commission of the State of California, sometimes referred to as the Public Utilities Commission or the CPUC.

Common Use Areas: Those areas that may be shared or used by occupants within a multifamily accommodation, including, but not limited to, laundry room, recreation room, swimming pool, tennis courts, gardens, hall/outdoor lighting.

Company's Operating Convenience: The use, under certain circumstances, of facilities or practices not ordinarily employed which contribute to the overall efficiency of the Utility's operations; the term does not refer to customer convenience nor to the use of facilities or adoption of practices required to comply with applicable laws, ordinances, rules, regulations, or similar requirements of public authorities.

Competitive Transition Costs (CTC): A non-bypassable charge, mandated by the California Legislature and the Public Utilities Commission and applicable to all full service existing and future retail electric customers of the Utility, all Direct Access Customers, and all departed load customers for the recovery of the Utility's transition costs.

Conduit: Ducts, pipes, or tubes of certain metals, plastics or other materials acceptable to the Utility for the installation and protection of electric wires and cables.

Connected Load: The sum of the rated capacities of all of the customers equipment that can be connected to the Utility's lines at any one time as more completely described in the rate schedules.

Control Area: An electric power system (or combination of electric power systems) to which a common automatic generation control scheme is applied in order to:  
(continued)



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**DEFINITIONS**

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Control Area: (continued)

- 1 match, at all times, the power output of the generators within the electric power system(s) and capacity and energy purchased from entities outside the electric power system(s) with the load within the electric power system(s);
- 2 maintain scheduled interchange with other Control Areas, within the limits of Good Utility Practice;
- 3 maintain the frequency of the electric power system(s) within reasonable limits in accordance with Good Utility Practice; and
- 4 provide sufficient generating capacity to maintain operating reserves in accordance with Good Utility Practice.

Curtailment: When the Utility temporarily reduces or interrupts service to customers because of projected or actual supply or capacity constraints, as further defined in Rule 14 and the Utility's Electrical Emergency Plan.

Customer: The person, group of persons, firm, corporation, institution, municipality, or other civic body, in whose name service is rendered, as evidenced by the signature on the application, contract, or agreement for that service or, in the absence of a signed instrument, by the receipt and payment of bills regularly issued in that name, regardless of the identity of the actual user of the service.

Date of Presentation: The date upon which a bill or notice is mailed as postmarked or delivered to the Customer.

Delivering Party: The entity supplying generation capacity and energy at Point(s) of Receipt.

Demand Charge: One component of an electric customer's bill, (along with the customer charge and the energy charge). This charge recovers some of the costs the Utility incurs in providing sufficient operating capacity to meet that customer's maximum demand. The demand charge is based on the highest level of kW required by the customer during a billing period.

Direct Access Customer: An End-Use Customer located within the service territory of the Utility who elects to receive Direct Access Service

Direct Access Service: A service option whereby Customers may purchase electric power and additional energy services from non-Utility entities known as Electric Service Providers.

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**DEFINITIONS**

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Direct Transaction: Per Section 366(a) of the Public Utilities Code, Direct Transaction is synonymous for Direct Access.

Distribution Lines: Overhead and underground lines which are designed to supply two or more services.

Distribution System: Those non- transmission and distribution facilities owned, controlled, and operated by the Utility that are used to provide distribution service under its tariffs.

Domestic Service: Service to a group of rooms, such as a house, a flat, or an apartment, which provides complete family living facilities in which the occupant(s) normally cooks meals, eats, sleeps, and carries on the household operations incidental to domestic life. Also referred to as residential service.

Dual Billing: A situation in which the Utility and Energy Service Provider present separate bills to the End-Use Customer for their respective services.

End-use Customer: A customer that takes final delivery of electric power, and does not resell the power.

Energy Broker: Any entity that arranges the sale and purchase of electric energy, transmission, and other services between buyers and sellers, but does not take title to any of the power sold.

Energy Service Provider (ESP): An aggregator, broker, marketer, billing agent or metering agent who provides energy or energy-related services to direct access customers within the Utility's service territory. A Scheduling Coordinator who provides these services in addition to those associated scheduling and balancing loads with the transmission provider will also be considered a Energy Service Provider.

Energy Supply. Includes, but is not limited to, procurement of electric energy; all scheduling, settlement, and other interactions with Scheduling Coordinators, the ISO and other transmission service providers, all ancillary services and congestion management.

Federal Energy Regulatory Commission (FERC): Federal agency with jurisdictional responsibilities over electric transmission service.

Firewall: A theoretical wall (Firewall) constructed by regulatory action to divide customers into two groups for purposes of (1) templating for direct access service, (2) identifying the need for hourly interval metering for direct access service,

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Franchise Territory: Public streets, roads, highways, and other public ways and places where the Utility has a legal right to occupy under franchise agreements with governmental bodies having jurisdiction.

Generation Customer: Any Utility electric customer with electric generation facilities (including back-up generation in parallel with the Utility) on the Customer's side of the interconnection point.

Good Utility Practice: Any of the practices, methods and acts engaged in or approved by a significant portion of the electric utility industry during the relevant time period, or any of the practices, methods and acts which, in the exercise of reasonable judgment in light of the facts known at the time the decision was made, could have been expected to accomplish the desired result at a reasonable cost consistent with good business practices, reliability, safety and expedition. Good Utility Practice is not intended to be limited to the optimum practice, method, or act to the exclusion of all others, but rather to be acceptable practices, methods, or acts generally accepted in the Western Systems Coordinating Council region.

Independent System Operator (ISO): The California Independent System Operator Corporation, a state-chartered, non-profit corporation that controls the transmission facilities of all participating transmission owners and dispatches certain generating units and loads. The ISO is responsible for the operation and control of the statewide transmission grid. Liberty Utilities (CalPeco Electric) LLC is not a participant in the ISO.

Independent Verification Agent: An independent third-party who provides verification to the Utility of a change in an End-Use Customer's Energy Service Provider.

Individual Metering: Where the Utility installs a separate service and meter for each individual residence, apartment dwelling unit, mobilehome space, store, office, etc.

Industrial Development: Two or more enterprises engaged in a process which creates a product or changes material into another form or product and located on a single parcel or on two or more contiguous parcels of land.

Industrial Service: Service to Customers engaged in process which creates or changes raw or unfinished materials into another form or product.

Insignificant Loads: Small operating loads such as gate openers, valve controls, clocks, timing devices, fire protection equipment, alarm devices, etc.

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Intermittent Loads: Loads requiring significant capacity but have low energy usage such as, but not limited to, welders, x-ray machines, fire protection equipment, etc.

Interruption: Unscheduled disruption of power deliveries to one or more end-use customer resulting from transmission or distribution capacity shortages.

Irrigation Pumping Service: Electric service used for irrigation or agricultural drainage purposes which is metered separately and billed under the applicable schedule.

Kilowatt (kW): A watt is a unit of electrical power equal to a current of one ampere under one volt of pressure. A kilowatt is equal to 1,000 watts.

Kilowatt-hours (kWh): 1,000 watts of electricity used for one hour.

Line Extension: New distribution facilities of the Utility that is a continuation of, or branch from, the nearest available existing permanent Distribution Line (including any facility rearrangements and relocations necessary to accommodate the extension) to the point of connection of the last service. The Utility's Line Extension includes transmission underbuilds and converting an existing single-phase line to three-phase in order to furnish three-phase service to an Applicant, but excludes transformers, meters and services.

Load: The amount of electric power delivered or required, measured in kilowatts, at any specified point or points on the Utility's system.

Mailed: Any communication is considered mailed when it is sent by electronic transfer or enclosed in a sealed envelope, properly addressed, and deposited in any U.S. Post Office box, postage prepaid.

Mandated Safety and Legal Notices: Mandated notices include notices required to be sent to all Utility Customers by law and include, but are not limited to, notices of the type, and with the frequency, that the Utility has used, and continues to use, to discharge legal obligations.

Market Participants: Entities, including but not limited to Scheduling Coordinators, Aggregators, Energy Brokers, Billing And Metering Agents and other energy service providers participating in the direct access market.

Marketer: Any entity that buys electric energy, transmission, and other services and resells those services at wholesale or to an End-Use Customer.

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Master-meter: Where the Utility installs one service and meter to supply more than one residence, apartment dwelling unit, mobilehome space, store, office, etc.

Maximum Demand: See Billing Demand.

Meter: The instrument(s) used for measuring the amount of energy and/or power delivered to a Customer.

Meter Read Date: Date upon which a meter is read for a Customer's account for the purposes of ending the current billing cycle and beginning a new one.

Meter Test Standard: The standard of accuracy for meters, as set forth in Rule 17.

Metering Equipment: The necessary meter, instrument transformers, test facilities, and other associated metering equipment.

Mobilehome Park: An area of land where two or more mobilehome sites are rented, or held out for rent, to accommodate mobilehomes used for human habitation. A mobilehome park is not a recreational vehicle park.

Mobilehome: A mobilehome is a structure designed for human habitation and for being moved on a street or highway under permit pursuant to the California Vehicle Code. Mobilehome also includes a manufactured home as defined in the California Health and Safety Code, but does not include a recreational vehicle or a commercial coach as defined in the California Health and Safety Code.

Monthly Power Deliveries: Energy which is delivered to a particular customer account during the course of a billing cycle.

Multifamily Dwelling: An apartment building, duplex, court group, residential hotel, or any other group of residential units located upon a single premises, providing the residential units meet the requirements for a residential dwelling unit. Hotels, guest or resort ranches, tourist camps, motels, auto courts, rest homes, rooming houses, boarding houses, dormitories, trailer courts, consisting primarily of guest rooms and/or transient accommodations, are not classed as multifamily accommodations.

Paid or Payment: Funds received by the Utility through the postal service, Utility payment office, Utility authorized agent, or deposited in Utility's bank account by electronic transfer.



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Permanent Service: Service which, in the opinion of the Utility, is of a permanent and established character. This may be continuous, intermittent, or seasonal in nature.

Person: Any individual, partnership, corporation, public agency, or other organization operating as a single entity.

Point of Delivery: The point where the Utility's conductors are connected to the Customer's conductors, regardless of the location of the Utility's meters or transformers.

Pole Line: Poles, cross-arms, insulators, conductors, switches, guy-wires, and other related equipment used in the construction of an electric overhead line.

Power Exchange: The California Power Exchange Corporation, a state chartered, non-profit organization charged with establishing a competitive spot market for electric power through day and hour ahead auction of generation and demand bids, in accordance with the PX Tariff.

Power Factor: The percent of total power delivery (kva) which does useful work. For billing purposes, average power factor is calculated from a trigonometric function of the ratio of reactive kilovolt-ampere-hours to the kilowatt-hours consumed during the billing month.

Premise: All of the real property and apparatus employed in a single enterprise on an integral parcel of land undivided, excepting in the case of industrial, agricultural, oil field, resort enterprises, and public or quasi-public institutions, by a dedicated street, highway or public thoroughfare or a railway. Automobile parking lots constituting a part of and adjacent to a single enterprise may be separated by an alley from the remainder of the Premise served.

Profiled Accounts: Accounts for which the Public Utilities Commission has authorized the use of approved statistical load profiles which are applied to cumulative end-use meter data in order to allocate consumption in lieu of recorded hourly data for billing and transmission settlements. This applies to Direct Access Customers with a maximum peak demand of less than 50 kW.

Public Goods Charge: A non-bypassable surcharge imposed on all retail sales of electricity and electrical services to fund public goods research, development and demonstration, energy efficiency activities, and low income assistance programs.

Public Utilities Commission: The Public Utilities Commission of the State of California.  
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Qualified Contractor/Subcontractor (QC/S): An Applicant's contractor or Subcontractor who:

1. Is licensed in California for the appropriate type of work such as, but not limited to, electrical and general;
2. Employs electric workmen properly qualified (Qualified Electrical Worker, Qualified Person, etc.) as defined in State of California High Voltage Safety Orders (Title 8, Subchapter 5, Group 2);
3. Complies with applicable laws such as, but not limited to, Equal Opportunity Regulations, OSHA, and EPA.

Rate Schedules: One or more tariff sheets(s) setting forth the charges and conditions for a particular class or type of service in a given area or location. A rate schedule includes all the wording on the applicable tariff sheet(s), such as Schedule number, title, class of service, applicability, territory, rates, conditions, and references to rules.

Real Time Meter: CPUC approved meter to be used for direct access or virtual direct access accounts which collects and stores usage data in increments of an hour or less. This term also implies those facilities associated with the physical meter that are required to retrieve the meter's data at any given time. This includes, but is not limited to, telephony and required data translation software.

Recreational Vehicle Park: A recreational vehicle (RV) park is an area or tract of land or a separate designated section within a mobile home park where one or more lots are occupied by owners or users of recreational vehicles.

Recreational Vehicle: A recreational vehicle (RV), as defined in the California Health and Safety Code, is a motor home, slide-in camper, park trailer, or camping trailer, with or without motive power, designed for human habitation for recreational or emergency occupancy.

Regional Transmission Group (RTG): A voluntary organization of transmission owners, transmission users and other entities approved by the FERC to efficiently coordinate transmission planning (and expansion), operation and use on a regional (and inter-regional) basis.

Regular Working Hours: The normal business hours of the Utility's business offices.

Residential Development: Five or more dwelling units in two or more buildings located on a single parcel of land.

Residential Hotel: A hotel establishment which provides lodging as a primary or permanent residence and has at least 50 percent of the units or rooms leased for a minimum period of

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one month and said units are occupied for nine months of the year. Residential hotels do not include establishments such as guest or resort hotels, resort motels or resort ranches, tourist camps, recreational vehicle parks, half-way houses, rooming houses, boarding houses, dormitories, rest homes, military barracks, or a house, apartment, flat or any residential unit which is used as a residence by a single family or group of persons.

Residential Non-Permanent Customer: Account holders who live in their home in Liberty's service territory less than a cumulative 183 days per year. (N)

Residential Permanent Customer: Account holders who self-declare/attest that they, or someone they authorize, will live in the home for a cumulative 183 days (6 months + 1 day) or more per year and do not have any electric service from another California electric utility where they receive any baseline allocation. (N)

Retailer: Any entity, whether it is a non-utility generator, aggregator, broker, or marketer, which offers electrical service to End-Use Customers.

Revenue: That portion of the total rate that supports the Utility's distribution line extension costs and excludes such things as fuel costs, generation, transmission, public purpose programs, and other costs that do not support the distribution line extension costs. Rules: Tariff sheets which cover the application of all rates, charges, and services, when such applicability is not set forth in and as part of the rate schedules.

Scenic Areas: An area such as a scenic highway, a state or national park or other area determined by a governmental agency to be of unusual scenic interest to the general public. Scenic highways are officially designated under the California Scenic Highway Program established pursuant to Paragraph 320 of the Public Utilities Code and applicable sections of the Streets and Highway Code. State or national parks or other areas of unusual scenic interest to the general public are determined by the appropriate governmental agency. "In proximity to" shall mean within 1,000 feet from each edge of the right-of-way of designated scenic highways and from the boundaries of designated parks and scenic areas. "Visible from" shall mean that overhead distribution facilities could be seen by motorists or pedestrians traveling along scenic highways or visiting parks or scenic areas.

Scheduled Meter Reading Date: The date that the Utility has scheduled that a customer's account be read for the purposes of ending the current billing cycle and beginning a new one.

Scheduling Coordinator: An entity certified by the Federal Energy Regulatory Commission that acts as liaison with the transmission entity on behalf of generators, supply aggregators (wholesale marketers), retailers, and customers to schedule the distribution of electricity.

Service: The availability of electric power and energy at the Customer's point of delivery, in the form, and at the approximate volume required for the purposes specified in application for service or contract irrespective of whether electric energy is actually utilized by the Customer.

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**Service Territory:** The territory in which the Utility has the responsibility to supply or make available electric service.

**Service Wires or Connection:** The overhead and underground primary or secondary facilities extending from the point of connection at the Distribution Line to the Service Delivery Point. When an underground Service Lateral is supplied from a Utility-designated overhead pole, the beginning point of connection to the Utility's Distribution Line shall be where the Service Lateral is connected to the Utility's overhead Distribution Line conductors.

**Settlement Day:** A day beginning at midnight and consisting of twenty-four (24) consecutive settlement periods for all transmission and PX transactions which use a period beginning at the start of an hour, and ending at the end of an hour.

**Single-family Dwelling:** A group of rooms, such as a house, a flat, or an apartment, which provides complete family living facilities in which the occupant(s) normally cooks meals, eats, sleeps, and carries on the household operations incidental to domestic life. Also referred to as Domestic Dwelling Unit.

**Small Business Customer:** A non-residential Customer who: (1) has a maximum billing demand of 20 kW, or less, per meter during the most recent 12 month period, or (2) has an annual usage of 40,000 kWh, or less, during the most recent 12 month period, or (3) meets the definition of a "microbusiness" under California Government Code 14837. This definition does not include non-residential Customers who are on a fixed usage or unmetered usage rate schedule.

**Small Customer:** Customers on demand-metered schedules with less than 20 kilowatts maximum billing demand per meter for at least nine billing periods during the most recent 12 month period; or (2) any customer on a non-demand metered schedule with demand estimated to be less than 20 kilowatts maximum billing demand per meter for at least nine billing periods during the most recent 12 month period, or (3) any domestic service customer.

**Statistical Load Profile:** The result of a statistical sampling technique which estimates a group of customers' (usually by customer class) hourly energy consumption calculated over a given period of time and allows such customers with load variances to be represented by a single measurement. Load profiles will be used to measure hourly energy consumption of residential, small and medium size commercial and agricultural customers, and other customers who engage in Direct Access transactions, consume a maximum demand of less than 50 kW and who have cumulative monthly metering instead of hourly metering.



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Stranded Costs: Investments which are uneconomic to operate in the deregulated energy market which limits the recovery of the Utility's investment.

Subdivision: An area for family dwelling which may be identified by filed subdivision plans or as an area in which a group of dwellings may be constructed about the same time, either by a large scale builder or by several builders working on a coordinated basis.

Submetering: Where the master-metered customer installs, owns, maintains, and reads the meters for billing the tenants in accordance with Rule 19.

Substructures: The surface and subsurface structures which are necessary to contain or support the Utilities electric facilities. This includes, but is not limited to, such things as splice boxes, pull boxes, equipment vaults and enclosures, foundations or pads for surface-mounted equipment.

Tariff Schedules: The entire body of effective rates, rentals, charges, and rules, collectively, of the Utility, including title page, preliminary statement, rate schedules, rules, sample forms, service area maps, and list of contracts and deviations.

Tariff Sheet: An individual sheet of the tariff schedules.

Temporary Service: Service to Premises, enterprises, or activities which are temporary in character, or where it is known in advance the service is of limited duration.

Time of Use (TOU): A schedule of rates that prices electricity according to the season or time of day that it is used. Such usage is aggregated into discrete time periods are called 'time-of-use' (TOU) periods and are as specified within the Utility's rate Schedules.

Transmission Load Customer: A Utility electric customer, interconnected to the Utility's power system at a transmission level voltage, who has no generation of its own paralleled with the Utility's system and is not interconnected with any generation source other than the Utility.

Utility Distribution Company (UDC): An entity that owns a Distribution System for the delivery of Energy to and from the transmission grid, and that provides regulated retail electric service to Customers, as well as regulated procurement service to those End-Use Customers who are not yet eligible for direct access, or who choose not to arrange such services through another retailer.

Utility: Liberty Utilities (CalPeco Electric) LLC.

Utility's Operating Convenience: The use, under certain circumstances, of facilities or practices not ordinarily employed which contribute to the overall efficiency of the Utility's operations; the term does not refer to customer convenience nor to the



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use of facilities or adoption of practices required to comply with applicable laws, ordinances, rules, regulations, or similar requirements of public authorities.

Validated Data: Billing quality data resulting from the editing and estimating functions of the Metering Agent.



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