



Winter Residential Load Management

Pilot Market Transformation Program (WRLMMTP)

2024-25 Program Manual

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1 INTRODUCTION

Welcome to the 2024-25 Oncor Pilot Winter Residential Load Management Market Transformation Program (RLMMTP or the “program”). The program offers incentives to eligible companies who aggregate residential customers for the purposes of demand reduction (participants).

This program complies with the standard offer requirements published by the Public Utility Commission of Texas (PUCT). This program manual is intended to inform service providers of the requirements and processes. However, participants should also review the PUCT rules related to energy efficiency programs and the requirements in the Texas Technical Reference Manual (TRM) energy efficiency programs, and are required to comply with such rules and requirements.

This program manual summarizes program requirements, processes and incentives but may not address all scenarios. Oncor has full discretion to interpret or modify program requirements, and may revise the program manual at any time.

We are here to help! If you have any questions after reading these materials, please don't hesitate to contact our program help desk at (866) 258-1874 or support@oncoreepm.com.

2 PROGRAM OVERVIEW

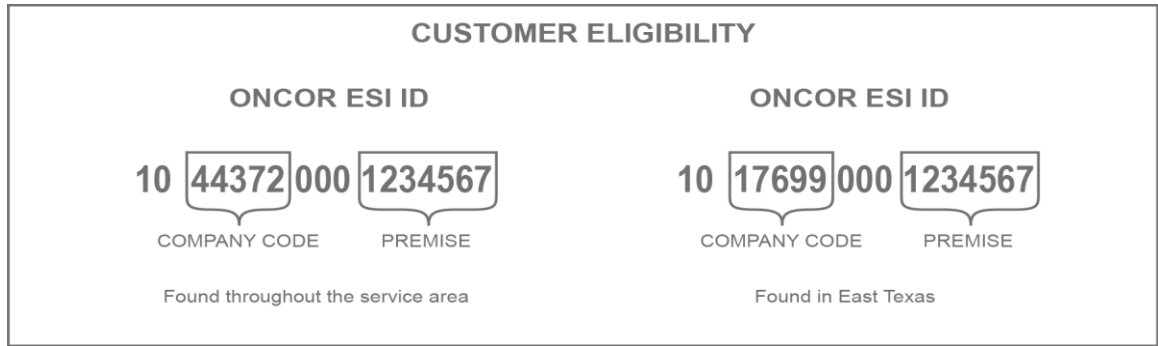
The program is designed to help residences reduce their winter energy demand on the Oncor grid when needed and help meet state energy efficiency goals. Incentives are paid to residential participants who curtail their electricity demand during a scheduled curtailment event, and during called curtailments throughout the winter period, which can occur 24/7 from December 1, 2024, through May 31, 2025. The peak periods are defined as 6 a.m. to 10 a.m. and 6 p.m. to 10 p.m.

The program is designed to be a load-shedding resource that helps prevent rolling curtailments during grid emergencies. The program is called when ERCOT anticipates or is in an EEA level 2 grid emergency. An EEA-2 is called just prior to rolling outages at EEA-3.

2.1 Project and Customer Eligibility

A project is a group of eligible sites submitted in EEPM by a participant. The project is assigned a unique identifier in EEPM and must meet the following requirements:

- A project must include potential demand savings from at least 500 residential customers during the winter period. The minimum project size may be adjusted by Oncor based on program performance requirements.
- Each eligible site is defined as an individual ESIID and meets the following criteria:
 - Located within the Oncor service territory.
 - Has an Oncor advanced metering infrastructure (AMI) or interval data recorder (IDR) meter to measure electricity demand.
 - On a residential service rate class.
 - Does not participate in an Electric Reliability Council of Texas (ERCOT) load curtailment program while enrolled in the Oncor program.
 - The residential customer has agreed to participate in a load management program.
 - Each Oncor residential customer will have a 17-digit premise number (ESIID). An ESIID should appear on a customer's electric bill and always start with “10.” For Oncor customers, the third through seventh digits will be either “44372” or “17699.” When entering project information in EEPM, only the last seven digits of the ESIID are used as input.



- After the project is approved by Oncor, no site changes are permitted.

The following loads are excluded from consideration for this program:

- A customer who has load contracted with a retail electric provider (REP) where that contract prevents the load from participating in a curtailment.
- Loads where curtailment would result in negative environmental or health effects.
- Curtailable load that receives an incentive through any other energy efficiency program. This can include, without limitation, any ERCOT, PUCT or other program currently available.
- Critical Load Customers are excluded from the program.

Projects not meeting site, project or program requirements are subject to cancellation by Oncor.

2.2 Participation Requirements

2.2.1 Curtailment Events

Participants must be available to curtail 24 hours a day, seven days a week, and be capable of curtailing load within 30 minutes notice. Oncor will provide incentives to Participants that curtailed at the Energy Emergency Alert EEA Level 2. Participants are expected to reduce their facility demand by the contracted amount when requested by Oncor during the winter period. With the exception of the scheduled curtailment event, curtailments will be called during or in anticipation of an ERCOT EEA Level 2 events, or to assure Oncor grid stability (grid emergencies). EEA events are called to prevent rotating outages across the ERCOT grid, so it is imperative participants curtail their facility demand as contracted. Participants must curtail a minimum of 90% of their obligation across all events to be eligible for payment.

Scheduled Curtailment Events

Each participant's contracted amount of demand savings will be established based on a three-hour scheduled curtailment event. The event normally takes place in December, and is designed to test the participant's ability to curtail demand by the requested amount. The contract amount will be based on the participant's average performance during the scheduled curtailment event. The contract amount will be used to calculate payment, should no called curtailment events be initiated during the winter period.

Called Curtailment Events

Called curtailment events are initiated during or in anticipation of grid emergencies. Oncor energy efficiency personnel will receive notification from Oncor's transmission and grid management organization that a grid emergency is imminent. Oncor energy efficiency personnel will then initiate a called curtailment event, and participants will be notified by automated text, email, and telephone calls. The notification will include the start and end times of the event. Participants should receive notification of a called curtailment event at least 30 minutes prior to the start time of the event.

Participants should immediately begin reducing their demand by the contracted amount. Thirty minutes after notification, Oncor will begin measuring demand reduction and participant performance.

Participants must be capable of curtailing their Obligation within 30 minutes of notification. Events may be called at any time during the Program operating period. Oncor may call a maximum of six events during the Program operating period, with any single event lasting no more than 12 hours within a 24-hour period. The minimum number of hours called for each event is 3 hours.

2.3 Incentives

2.3.1 Program Budget

The incentive budget for the program is determined by Oncor and is based on the program demand savings goal. Oncor reserves the right to adjust the program incentive budget and goal at any time at its sole discretion.

The estimated program incentive budget and demand savings goal are as follows:

2024-25 Program Incentive Budget	\$400,000
2024-25 Program Demand Savings Goal	10,000 kW

2.3.2 Incentive Calculation

Incentives are based on the average actual demand reduction achieved by the participant across all events during the winter period.

$$\text{Participant Incentive} = \text{Actual Demand Savings} \times \text{Incentive Rate}$$

Incentives for the 2024-2 program are listed in the table below:

Type of Incentive	Incentive Rate
EEA Level 2	\$35/kW

Verification Process

Participant performance is verified by retrieving and analyzing actual 15 minute usage data from Oncor’s AMI or IDR meters. If actual meter data is not available for a site during a scheduled or called curtailment event, including any associated baseline days, Oncor reserves the right to remove the site from the program.

Demand savings are calculated according to the following formula:

Verified Demand Savings = Baseline Period Kilowatts – Curtailment Kilowatts
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All demand reduction savings are calculated using PUCT-approved calculations defined in the TRM. For additional information, please refer to the TRM on the Oncor EEPM website <https://www.oncoreepm.com/>.

2.3.3 Incentive Limits

Oncor will only make incentive payments to the extent funding remains available in the program option budget. If the program reaches its program-wide incentive cap, individual participant incentives will be modified in proportion to demand savings achieved.

3 PROJECT LIFE CYCLE

Participants may submit project applications only after applying to the program and executing an umbrella contract and Program Addendum. See Section 5, “How to Participate,” for more information on joining the program as a participant.

Approved, registered participants will submit project applications and receive communications from the program via the Oncor website (EEPm), available at <https://www.oncoreepm.com>.

All applications and supplemental documentation, if required, must be attached to the project under the “Attachment” tab.

3.1 Submission Process

A project application will progress through the following phases:

- Creation and submission of a project
- Winter period
- Scheduled curtailment event
- Project approval and contracting
- Project evaluation and payment

Below is an outline of the application process, from start to finish.

3.1.1 *Creating and Submitting a Project*

Participants must provide information about the scope of their proposed Project(s). The type of information requested includes the following:

- Project Name
- Requested kW
- Oncor Account Numbers (ESIIDs) – To verify that a customer is an Oncor customer, the Participant should look for the distinguishing numbers, 44372 or 17699 located as digits 3 through 7 in the 17-digit number. Participants will download an ESIID upload template, populate with participating ESIIDs, and then upload the file.

3.1.2 *Project Evaluation*

Oncor may reject a project for any reason in its sole discretion. Examples of reasons why Oncor may reject a project include:

Oncor may request clarification of, or additional information about, any item submitted as part of the project application. Applicants must respond to such requests within the time period specified by Oncor. If the clarification or additional information provided is not sufficiently responsive, Oncor may, at its sole discretion, request additional information or discontinue its evaluation of the submittal.

3.2 Winter Period

Participants with an approved project shall reduce demand during curtailment events when notified by Oncor. Oncor will verify demand savings from all curtailment events. Program year kW load management event savings will be calculated as the average savings of all events.

3.3 Scheduled Curtailment Event

Participants will curtail demand during the scheduled curtailment event, typically scheduled during a three-hour period in December. Oncor will verify the participant's demand savings from the scheduled curtailment event using the verification process described in Section 2.3.2, "Incentive Calculation."

3.4 Project Approval and Contracting

Projects will be approved based on the results of the scheduled curtailment event and project waiting list order until the program budget has been exhausted. Your contracted amount will be the lesser of:

- Requested demand savings amount entered during project creation, or
- Verified demand savings achieved during the scheduled curtailment event.

Oncor will send participants a Reservation of Funds Agreement which must be signed and returned within two business days.

Oncor will then notify participants that they either have an approved contract or are not participating in the program. Participants who do not receive contracts are ineligible for any incentive payment for participation in the scheduled curtailment event.

Based on the program budget and other needs, Oncor reserves the right to adjust participant's requested amount of demand savings and incentives.

3.5 Project Evaluation and Payment

Oncor may reject or cancel a project for any reason in its sole discretion. Projects will be evaluated in the waiting list order. If the total program demand savings for the scheduled curtailment event exceeds the program goal, Oncor may proportionally award contract amounts to service providers at its sole discretion. Oncor may also raise or reduce the program budget at its sole discretion.

4 IMPORTANT PROGRAM DATES AND DEADLINES

The schedule for the 2024-2025 program will be provided on Oncor's Energy Efficiency Program website, www.oncoreepm.com. The program is scheduled to open for Program Applications and Project Submissions on October 1, 2024, at 10 a.m. CST. Final ESID lists must be submitted no later than November 1, 2024 at 5 p.m. CST.

A scheduled curtailment event will occur in December. During this event, all participants should curtail their controlled demand by the savings requested in the submitted project.

Selected participants must be available for called curtailment events during the winter period. The winter peak period is from 6 a.m. to 10 a.m. and 6 p.m. to 10 p.m., December 1, 2024, through May 31, 2025.

If there are no called curtailment events during the first half of the winter period, a second scheduled curtailment event may be called.

Incentives are paid at the end of the winter period, within 45 days after demand savings are calculated and verified by Oncor.

5 HOW TO PARTICIPATE

5.1 Contractor Eligibility and Requirements

Each service provider must register in EEPM, enter into the umbrella contract, apply and be accepted to participate in the program, and execute the program addendum with Oncor to participate.

5.1.1 Contractor Application Criteria

Eligible service providers include, but are not limited to, national or local energy service companies and REP's. Prior to applying, candidates should ensure they are capable of curtailing electricity demand at the request of Oncor during the winter period.

5.1.2 Registering and Applying as a Service Provider

Step 1: Register on the Contractor Portal

The EEPM contractor portal can be accessed at <https://www.oncoreepm.com>. Click on "Sign Up or Learn More" at the bottom to read our agreement (also known as the umbrella contract). Then provide your company name and federal tax ID number and click "Next" to complete and submit your application. Oncor will review your application and, upon approval, provide you with a username and password for our EEPM system.

Once you receive your login and password, log into EEPM and complete your service provider profile.

Step 2: Request Association with RLMMTP

Request association with RLMMTP by contacting the EEPM help desk at (866) 258-1874 or support@oncoreepm.com.

Step 3: Complete Program Application and Sign Program Addendum

After requesting association with the program, an application will appear on the participant's home screen in EEPM. The following information will be required as part of the application:

- **Participant contacts:** The primary and secondary contacts used to provide notification to the participant of a required curtailment. A representative of the participant must be available at this contact point during the winter period. Phone number(s), mobile phone number(s), and email address(es) should be provided to allow Oncor to communicate with the participant's primary and secondary representatives concerning the program. Should the participant need to change these contacts during the term of the project, it must provide the new contact and contact information to Oncor at least five business days prior to the date the new contact will take effect.
- **Additional participant contact name(s) and information:** Additional identification and information related to one or more representative(s) of the participant who are also responsible for implementation of the project. Phone number(s), mobile phone number(s) and email address(es) should be provided to allow Oncor to communicate with the participant's representative concerning the program.
- Company description.
- Statement of residential load management experience.
- Description of recruitment process.
- Description of control strategy, including customer experience.
- Documentation of Letter of Authorization (LOA) or equivalent for authorization of energy consumption data release.

Complete the program application and sign the addendum. The addendum must be attached under the "Attachment" tab when the application is submitted online through EEPM. The addendum does not in any way guarantee the service provider funding during the program year and does not in any way obligate Oncor to the program. After the application is approved by Oncor, projects can be entered in EEPM and submitted.

Oncor will not entertain proposed modifications to the market transformation program addendum unless unique circumstances merit and require revision at the sole discretion of Oncor. Applicants are urged to review the sample program addendum prior to submitting a project application.

If Oncor approves a program application, it will execute the addendum, if applicable, and attach a copy to the "Service Provider Documents" tab. Once the application is approved by Oncor, projects can be submitted for approval via EEPM.

5.2 Termination of Program Addendums

Oncor may terminate any or all program addendums, in whole or in part, at any time in its sole discretion, by providing written notice of termination to the service provider. The notice of termination will specify the effective date of any termination and that the program addendum is terminated in its entirety.

Oncor may refuse a service provider the opportunity to complete an addendum in the RLMMP for any reason in Oncor's sole discretion, including based on the service provider's prior participation in the program or any other energy efficiency program offered by Oncor or another utility sponsor. Please refer to the umbrella contract and program addendum for actual termination provisions. Please note this section is only a summary of certain terms in the umbrella contract and program addendum, and the terms of the actual umbrella contract and program addendum supersede and control over this summary in the event of any conflict.

5.3 Confidentiality

The program is subject to oversight by the PUCT, which may request a copy of any materials Oncor receives. Sensitive information submitted by the participant to Oncor such as financial statements and project costs will be treated confidentially to the extent possible. However, Oncor will not be liable to any participant or other party as a result of public disclosure of any information submitted pursuant to the program.

5.4 Submission of False, Misleading or Incorrect Information

Oncor reserves the right to discontinue its evaluation of all submittals from any participant who submits false, misleading or incorrect information.

5.5 Program Participation Costs

Oncor will not reimburse any participant for any costs incurred by participating in the program, including costs of preparing the project application and reviewing or executing the addendum.

5.6 Participation Restrictions and Additional Qualifications

Oncor may impose additional restrictions and qualification requirements on participants in addition to those set forth in the program addendum.

6 PROGRAM LINKS AND CONTACTS

Below are links to additional resources for participants:

- EEPM service provider portal: <https://www.oncoreepm.com/>
- EEPM help desk: support@oncoreepm.com or (866) 258-1874
- PUCT electric substantive rules:
<http://www.puc.texas.gov/agency/ruleslaws/subrules/electric/Electric.aspx>
- Texas TRM: <http://www.texasefficiency.com/index.php/emv>
- ERCOT: <http://ercot.com/>