



Portland General Electric
121 SW Salmon Street • Portland, OR 97204
portlandgeneral.com

October 3, 2022

Public Utility Commission of Oregon
Attn: Filing Center
201 High Street, S.E.
P.O. Box 1088
Salem, OR 97308-1088

RE: Advice No. 22-22, Schedule 8 and 52, Residential and Nonresidential Electric Vehicle Charging Rebate Pilot Updates

Portland General Electric Company (PGE) submits this filing pursuant to Oregon Revised Statutes 757.205 and 757.210, and Oregon Administrative Rule (OAR) 860-022-0025 for filing a proposed tariff sheets associated with Tariff P.U.C. No. 18 with a requested effective date of **November 16, 2022**.

Second Revisions of Sheet No. 8-2
Second Revision of Sheet No. 8-4
Original Sheet No. 8-5
First Revision of Sheet No. 52-1
Second Revision of Sheet No. 52-2
First Revision of Sheet No. 52-3

The purpose of this filing is to make additional rebates available to customers to aid in the installation of Electric Vehicle Supply Equipment (EVSE). PGE is proposing additional rebates for the installation of Level 2 EVSE Chargers and Direct Current Fast Charging (DCFC) EVSE for commercial customers and a panel upgrade rebate for residential customers enrolling in PGE's Residential Smart Charging Pilot. In addition, PGE is making changes to clarify language associated with Income Eligibility in both tariffs.

These additional rebates are intended to complement existing, Commission-approved rebate programs and will help propel the adoption of Electric Vehicles (EVs) among commercial and residential customers by offering additional offsets to the cost of installing this equipment. Further detail is available in PGE's proposed 2022 budget for the use of revenues collected from the company's HB 2165 Monthly Meter Charge for transportation electrification (TE), as well as in the program applications submitted concurrently with this tariff application in UM 2033.

Redline versions are included as a courtesy.

To satisfy the requirements of OAR 860-022-0025, PGE responds as follows:

This change does not increase, decrease, otherwise change existing rates, or impact revenues. The rebates provided through these programs will be funded from HB 2165 Monthly Meter Charge revenues, which are dedicated to the support of TE-related programs, infrastructure measures and services under ORS 757.357.

Please direct any questions regarding this filing to Casey Manley at casey.manley@pgn.com Please direct your communications related to this filing to the following email address: pgc.opuc.filings@pgn.com.

Sincerely,

\s\ Robert Macfarlane

Robert Macfarlane
Manager, Pricing & Tariffs

Enclosures

SCHEDULE 8 (Continued)

DEFINITIONS (Continued)

Income-Eligible Customer – A verified Residential Customer at 120% or below the state median income as defined by the US Department of Housing Urban Development, or the home qualifies for Section 8 housing. (C)

Managed Charging Event – A period during which the utility will provide Direct Load Control by sending communication signals to a customer’s vehicle or EVSE to adjust the rate or time of charge.

Participation Year – Twelve consecutive months from the anniversary date of a Qualifying Customer’s enrollment in the Smart Charging Program.

Qualifying Customer – A Residential Customer in an existing single-family residence, including separately metered residences with assigned parking, with a Qualified L2 EVSE (excludes new construction or multifamily property).

Qualified Level 2 Electric Vehicle Supply Equipment (L2 EVSE) – A pre-approved L2 EVSE that meets the program’s connectivity and controllability criteria.

Vehicle Telematics - Device installed in a vehicle that allows the sending, receiving, and storing of telemetry data.

ELIGIBILITY

Eligible Customers must comply with the terms of the participation agreement and be a Qualifying Customer with either of the following. (C)

- A. Qualified L2 EVSE and agree to the following minimum participation requirements:
- (1) the Qualified L2 EVSE is successfully connected to the Smart Charging Program for at least 50% of the participation year,
 - (2) the Qualified L2 EVSE participates in six Managed Charging Events, and
 - (3) the Qualified L2 EVSE completes 25 Active Charging Sessions.
- Or
- B. EV with Vehicle Telematics connected to an approved vehicle telematics provider and agreement to the following minimum participation requirements:
- (1) the connected EV participates in six Managed Charging Events,
 - (2) the connected EV completes 25 Active Charging Sessions, and
 - (3) the vehicle telematics provider’s participation agreement. (C)

ENROLLMENT

Qualifying Customers can enroll in the Pilot at PortlandGeneral.com through July 31, 2024. Unless PGE terminates this Pilot, customers will remain enrolled in the Smart Charging Program for the entire Pilot term. Qualifying Customers that reenroll in the Pilot are not eligible for a second payment for installation of a single Qualified L2 EVSE. A Qualifying Customer continuing service at a new residence is not considered a new enrollment.

SCHEDULE 8 (Continued)

(T)

INCENTIVES (Continued)

(N)

Standard Panel Upgrade Rebate	A one-time incentive to aid in the materials and electrical work necessary to upgrade participating customers' home electrical panels to 200A service in order to install a Qualified Level 2 EVSE. Customers must also be applying for a Standard EVSE Installation Rebate. Qualifying Customers will receive the rebate by check or bill credit from the Company upon approval of rebate qualification. This incentive is available until the designated Panel Upgrade Rebate funding is exhausted.	Up to \$1,000; capped at price paid.
Income-Eligible Panel Upgrade Rebate	A one-time incentive to aid in the materials and electrical work necessary to upgrade participating customers' home electrical panels to 200A service in order to install a Qualified Level 2 EVSE. Customers must also be applying for an Income-Eligible EVSE Installation Rebate. Qualifying Income-Eligible Customers will receive the rebate by check or bill credit from the Company upon approval of rebate qualification. This incentive is available until the designated Panel Upgrade Rebate funding is exhausted.	Up to \$5,000; capped at price paid.

(N)

MANAGED CHARGING EVENTS

Customers will be randomly assigned into one of three groups: A, B, or C. Group A will be the control group and will have no demand response tactics scheduled. Group B will participate in load shifting events where charging times will be shifted away from system peak periods. Group C will have their charging slowed or stopped during event periods. The Company will strive to maintain the equal number of participants and EVSE models in each group. Managed Charged Events may be called at any hour and any weekday excluding Holidays. During Managed Charging Events, the Customer will allow the Company to control their Qualified L2 EVSE or connected EV for the duration of the event. The Customer has the option not to participate by overriding via the manufacturer's mobile application.

SCHEDULE 8 (Concluded)

SPECIAL CONDITIONS

1. If a Qualifying Customer moves to a different residence, the customer may continue participation in the Smart Charing Program at the new residence if the Customer meets the eligibility requirements.
2. The Company will defer and seek recovery of all Pilot costs not otherwise included in rates.
3. The provisions of this schedule do not apply for any period that the Company interrupts the Qualifying Customer's load for a system emergency or any other time that a Qualifying Customer's service is interrupted by events outside the control of the Company. The provisions of this schedule will not affect the calculation or rate of the regular service associated with the Qualifying Customer's Schedule 7 charges and associated charges.

TERM

This pilot began October 23, 2020 and expires December 31, 2024.

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(M)

SCHEDULE 52
NONRESIDENTIAL ELECTRIC VEHICLE CHARGING REBATE PILOT

PURPOSE

This Nonresidential Electric Vehicle (EV) Charging Rebate Pilot provides eligible Customers a rebate towards the purchase and installation of EV charging infrastructure. The overarching goals of the pilot are to:

- Accelerate EV adoption by ensuring adequate charging infrastructure is available to meet customers' charging needs;
- Reduce the cost and complexity of installing EV Supply Equipment that can preclude Customers from deploying charging infrastructure; and
- Create a network of demand-side resources to reduce the costs of serving EV loads by supporting efficient grid operations and future renewables integration.

AVAILABLE

In all territory served by the Company.

APPLICABLE

This pilot is applicable to Nonresidential Customers and property managers/owners of multifamily residence(s) until the cap approved in OPUC Order No. 19-385 and the authorized HB 2165 Monthly Meter Charge budget have been reached. Temporary customers such as construction sites which have not received their certificate of occupancy are excluded.

(C)
(C)

DEFINITIONS

DCFC EVSE – An EVSE that transfers direct current to the EV.

(N)

Electric Vehicle Supply Equipment (EVSE) – The device, including the cable(s), coupler(s), and embedded software, installed for the purpose of transferring electricity between the electrical infrastructure and the EV.

(C)

Level 2 (L2) EVSE – An EVSE that transfers alternating current to the EV at 208 or 240 volts.

(N)
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Operational – An EVSE installed on the premises that is able to transfer energy between the premises wiring and the EV, with all the applicable payment methods (e.g., credit card, phone app, subscription card), and transmit operational data (e.g., energy usage, session start/end times) to the EVSP.

Port – The cable and coupler used to transfer energy from the EVSE to the EV. The number of Ports is defined by the number of EVs that can be charged simultaneously by a given EVSE. There are commonly one or two Ports per EVSE.

SCHEDULE 52 (Continued)

DEFINITIONS (Continued)

Qualified EVSE –The list of qualified EVSE(s) that are available for rebate is determined by the Company and listed on PortlandGeneral.com.

ELIGIBILITY

Eligible Customers must own, lease, or demonstrate control over the site where the EVSE(s) are installed. The Customer will be responsible for procuring the EVSE(s).

ENROLLMENT

The customer enrollment period will be open until funds have been allocated. Eligible Customers may enroll at PortlandGeneral.com.

REBATES

Rebate	Description	Amount
Standard L2 EVSE Rebate	A one-time rebate for the purchase of a Qualified L2 EVSE.	Up to \$1,000 per Port; capped at price paid. Customers are eligible for up to \$50,000 in Standard L2 EVSE Rebates per site.
Multifamily L2 EVSE Rebate	A one-time rebate for the purchase of a Qualified L2 EVSE installed at a multifamily dwelling.	Up to \$2,300 per Port; capped at price paid. Customers are eligible for up to \$50,000 in Multifamily L2 EVSE Rebates per site.
L2 Installation Rebate	A one-time rebate for installing a L2 EVSE. Eligible covered costs include the cost of installing electrical infrastructure to support the EVSE, including but not limited to trenching, conduit, switchgear, equipment pads, line extension costs, site restoration, and EVSE installation.	Up to 80% of eligible costs paid or \$6,000 per Port, whichever is less. Customers are eligible for up to six L2 Installation Rebates per site.
DCFC EVSE Rebate	A one-time rebate for the purchase and installation of a Qualified DCFC EVSE.	Up to \$350 per kW of maximum power output for the EVSE, up to a maximum of \$25,000 per Port.

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SCHEDULE 52 (Concluded)

REBATES Continued)

Rebates are available for reservation on a first come-first serve basis per the reservation process identified on PortlandGeneral.com. Eligible Customers must comply with the application instructions and agree to the pilot Terms and Conditions on PortlandGeneral.com to receive the rebate.

Participating Customers will receive the one-time payment by check no later than 90 days from the Company receiving a complete application. All EVSE(s) installed under the pilot are subject to verification by PGE.

Participating Customers must meet the pilot requirements for 10 years. In the event the Participating Customer does not meet this commitment, the Participating Customer commits to reimburse PGE the pro-rata value of the rebate, calculated over the 10-year term.

SPECIAL CONDITIONS

1. Participation in this pilot is not mandatory to install EV charging equipment.
2. The Customer's charges for Electricity Service under any of the Company's Standard Service or Direct Access Service schedules are not changed or affected in any way by service under this schedule and are due and payable as specified in those schedules.
3. The Company will defer and seek recovery of all pilot costs not otherwise included in rates.
4. Participating Customers will maintain the EVSE(s) on a Standard Service Schedule. Customers on Direct Access Service must have the participating chargers separately metered and on a Standard Service Schedule.
5. Participating Customers will ensure the EVSE(s) are Qualified and Operational. If a property with EVSE(s) installed under the pilot changes ownership, lesseeship or management, participation in the pilot can be assumed by a new owner, lessee or manager that is willing to meet the pilot requirements.
6. Participating Customers will authorize the EVSP to provide operational data (e.g. energy usage, time of day usage and number of unique drivers) to PGE. Participating Customers agree to allow Company and its agents and representatives to use data gathered as part of the pilot in regulatory reporting, ordinary business use, industry forums, case studies or other similar activities, in accordance with applicable laws and regulations and to participate in Company-led research such as surveys.
7. Participating Customers may terminate participation in the pilot after providing PGE no less than 30 days' notice and are subject to the noncompliance reimbursement referenced in this Tariff. At the end of the 10-year term, Participating Customers have the option to continue to participate in the pilot if it is still active, but there is no obligation to do so.

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PGE Advice No. 22-22
Schedule 8 and 52, Residential and Nonresidential
Electric Vehicle Charging Rebate Pilot Updates

Courtesy Redline of Schedule 8 & 52

SCHEDULE 8 (Continued)

DEFINITIONS (Continued)

Income-Eligible Customer – A verified Residential Customer at ~~120~~80% or below the state area median income as defined by the US Department of Housing Urban Development, or the home qualifies for Section 8 housing.

Managed Charging Event – A period during which the utility will provide Direct Load Control by sending communication signals to a customer's vehicle or EVSE to adjust the rate or time of charge.

Participation Year – Twelve consecutive months from the anniversary date of a Qualifying Customer's enrollment in the Smart Charging Program.

Qualifying Customer – A Residential Customer in an existing single-family residence, including separately metered residences with assigned parking, with a Qualified L2 EVSE (excludes new construction or multifamily property).

Qualified Level 2 Electric Vehicle Supply Equipment (L2 EVSE) – A pre-approved L2 EVSE that meets the program's connectivity and controllability criteria.

Vehicle Telematics - Device installed in a vehicle that allows the sending, receiving, and storing of telemetry data.

ELIGIBILITY

Eligible Customers must comply with the terms of the participation agreement and be a Qualifying Customer with either of the following.

A. Qualified L2 EVSE and agree to the following minimum participation requirements:

- (1) the Qualified L2 EVSE is successfully connected to the Smart Charging Program for at least 50% of the participation year,
- (2) the Qualified L2 EVSE participates in six Managed Charging Events, and
- (3) the Qualified L2 EVSE completes 25 Active Charging Sessions.

Or

B. EV with Vehicle Telematics connected to a n approved vehicle telematics provider and participant agreement to the following minimum participation requirements:

- (1) the connected EV participates in six Managed Charging Events, and
- (2) the connected EV completes 25 Active Charging Sessions, and
- (3) the vehicle telematics provider's participation agreement.

ENROLLMENT

Qualifying Customers can enroll in the Pilot at PortlandGeneral.com through July 31, 2024. Unless PGE terminates this Pilot, customers will remain enrolled in the Smart Charging Program for the entire Pilot term. Qualifying Customers that reenroll in the Pilot are not eligible for a second payment for installation of a single Qualified L2 EVSE. A Qualifying Customer continuing service at a new residence is not considered a new enrollment.

SCHEDULE 8 (Continued)

INCENTIVES (Continued)

<u>Standard Panel Upgrade Rebate</u>	<u>A one-time incentive to aid in the materials and electrical work necessary to upgrade participating customers' home electrical panels to 200A service in order to install a Qualified Level 2 EVSE. Customers must also be applying for a Standard EVSE Installation Rebate. Qualifying Customers will receive the rebate by check or bill credit from the Company upon approval of rebate qualification. This incentive is available until the designated Panel Upgrade Rebate funding is exhausted.</u>	<u>Up to \$1,000; capped at price paid.</u>
<u>Income-Eligible Panel Upgrade Rebate</u>	<u>A one-time incentive to aid in the materials and electrical work necessary to upgrade participating customers' home electrical panels to 200A service in order to install a Qualified Level 2 EVSE. Customers must also be applying for an Income-Eligible EVSE Installation Rebate. Qualifying Income-Eligible Customers will receive the rebate by check or bill credit from the Company upon approval of rebate qualification. This incentive is available until the designated Panel Upgrade Rebate funding is exhausted.</u>	<u>Up to \$5,000; capped at price paid.</u>

MANAGED CHARGING EVENTS

Customers will be randomly assigned into one of three groups: A, B, or C. Group A will be the control group and will have no demand response tactics scheduled. Group B will participate in load shifting events where charging times will be shifted away from system peak periods. Group C will have their charging slowed or stopped during event periods. The Company will strive to maintain the equal number of participants and EVSE models in each group. Managed Charged Events may be called at any hour and any weekday excluding Holidays. During Managed Charging Events, the Customer will allow the Company to control their Qualified L2 EVSE or connected EV for the duration of the event. The Customer has the option not to participate by overriding via the manufacturer's mobile application.

SCHEDULE 8 (Concluded)

SPECIAL CONDITIONS

1. If a Qualifying Customer moves to a different residence, the customer may continue participation in the Smart Charing Program at the new residence if the Customer meets the eligibility requirements.
2. The Company will defer and seek recovery of all Pilot costs not otherwise included in rates.
3. The provisions of this schedule do not apply for any period that the Company interrupts the Qualifying Customer's load for a system emergency or any other time that a Qualifying Customer's service is interrupted by events outside the control of the Company. The provisions of this schedule will not affect the calculation or rate of the regular service associated with the Qualifying Customer's Schedule 7 charges and associated charges.

TERM

This pilot began October 23, 2020 and expires December 31, 2024.

SCHEDULE 52 NONRESIDENTIAL ELECTRIC VEHICLE CHARGING REBATE PILOT

PURPOSE

This Nonresidential Electric Vehicle (EV) Charging Rebate Pilot provides eligible Customers a rebate towards the purchase and installation of EV charging infrastructure. The overarching goals of the pilot are to:

- Accelerate EV adoption by ensuring adequate charging infrastructure is available to meet customers' charging needs;
- Reduce the cost and complexity of installing EV Supply Equipment that can preclude Customers from deploying charging infrastructure; and
- Create a network of demand-side resources to reduce the costs of serving EV loads by supporting efficient grid operations and future renewables integration.

AVAILABLE

In all territory served by the Company.

APPLICABLE

This pilot is applicable to Nonresidential Customers and property managers/owners of multifamily residence(s) until the cap approved in OPUC Order No. 19-385 and the authorized HB 2165 Monthly Meter Charge budget ~~has~~ been reached. Temporary customers such as construction sites which have not received their certificate of occupancy are excluded.

DEFINITIONS

DCFC EVSE – An EVSE that transfers direct current to the EV.

Electric Vehicle Supply Equipment (EVSE) – The device, including the cable(s), coupler(s), and embedded software, installed for the purpose of transferring ~~alternating current~~ electricity ~~at 208 or 240 volts~~ between the electrical infrastructure and the EV.

Level 2 (L2) EVSE – An EVSE that transfers alternating current to the EV at 208 or 240 volts.

~~Income-Eligible Multifamily Residence – A multifamily residence where residents in at least 50% of the dwelling units are at or below 80% area median income as defined by the US Department of Housing Urban Development, or the facility qualifies as Section 8 housing.~~

Operational – An EVSE installed on the premises that is able to transfer energy between the premises wiring and the EV, with all the applicable payment methods (e.g., credit card, phone app, subscription card), and transmit operational data (e.g., energy usage, session start/end times) to the EVSP.

Port – The cable and coupler used to transfer energy from the EVSE to the EV. The number of Ports is defined by the number of EVs that can be charged simultaneously by a given EVSE. There are commonly one or two Ports per EVSE.

Advice No. 22-22
Issued October 3, 2022
Brett Sims, Vice President

Effective for service
on and after November 16, 2022

SCHEDULE 52 (Continued)

DEFINITIONS (Continued)

Qualified EVSE –The list of qualified EVSE(s) that are available for rebate is determined by the Company and listed on PortlandGeneral.com.

ELIGIBILITY

Eligible Customers must own, lease, or demonstrate control over the site where the EVSE(s) are installed. The Customer will be responsible for procuring the EVSE(s).

ENROLLMENT

The customer enrollment period will be open until funds have been allocated. Eligible Customers may enroll at PortlandGeneral.com.

REBATES

<u>Rebate</u>	<u>Description</u>	<u>Amount</u>
<u>Standard L2 EVSE Rebate</u>	<u>A one-time rebate for the purchase of a Qualified L2 EVSE.</u>	<u>Up to \$1,000 per Port; capped at price paid. Customers are eligible for up to \$50,000 in Standard L2 EVSE Rebates per site.</u>
<u>Multifamily L2 EVSE Rebate</u>	<u>A one-time rebate for the purchase of a Qualified L2 EVSE installed at a multifamily dwelling.</u>	<u>Up to \$2,300 per Port; capped at price paid. Customers are eligible for up to \$50,000 in Multifamily L2 EVSE Rebates per site.</u>
<u>L2 Installation Rebate</u>	<u>A one-time rebate for installing a L2 EVSE. Eligible covered costs include the cost of installing electrical infrastructure to support the EVSE, including but not limited to trenching, conduit, switchgear, equipment pads, line extension costs, site restoration, and EVSE installation.</u>	<u>Up to 80% of eligible costs paid or \$6,000 per Port, whichever is less. Customers are eligible for up to six L2 Installation Rebates per site.</u>
<u>DCFC EVSE Rebate</u>	<u>A one-time rebate for the purchase and installation of a Qualified DCFC EVSE.</u>	<u>Up to \$350 per kW of maximum power output for the EVSE, up to a maximum of \$25,000 per Port.</u>

SCHEDULE 52 (Concluded)

REBATES Continued)

~~The standard rebate is up to \$1,000 per Port for the installation of Qualified EVSE(s). Income-Eligible Multifamily Residence participants receive up to \$2,300 per Port.~~ Rebates are available for reservation on a first come-first serve basis per the reservation process identified on PortlandGeneral.com and the total rebate amount is limited to \$50,000 for any one Customer or location. Eligible Customers must comply with the application instructions and agree to the pilot Terms and Conditions on PortlandGeneral.com to receive the rebate.

Participating Customers will receive the one-time payment by check no later than 90 days from the Company receiving a complete application. All EVSE(s) installed under the pilot are subject to verification by PGE.

Participating Customers must meet the pilot requirements for 10 years. In the event the Participating Customer does not meet this commitment, the Participating Customer commits to reimburse PGE the pro-rata value of the rebate, calculated over the 10-year term.

SPECIAL CONDITIONS

1. Participation in this pilot is not mandatory to install EV charging equipment.
2. The Customer's charges for Electricity Service under any of the Company's Standard Service or Direct Access Service schedules are not changed or affected in any way by service under this schedule and are due and payable as specified in those schedules.
3. The Company will defer and seek recovery of all pilot costs not otherwise included in rates.
4. Participating Customers will maintain the EVSE(s) on a Standard Service Schedule. Customers on Direct Access Service must have the participating chargers separately metered and on a Standard Service Schedule.
5. Participating Customers will ensure the EVSE(s) are Qualified and Operational. If a property with EVSE(s) installed under the pilot changes ownership, lesseeship or management, participation in the pilot can be assumed by a new owner, lessee or manager that is willing to meet the pilot requirements.
6. Participating Customers will authorize the EVSP to provide operational data (e.g. energy usage, time of day usage and number of unique drivers) to PGE. Participating Customers agree to allow Company and its agents and representatives to use data gathered as part of the pilot in regulatory reporting, ordinary business use, industry forums, case studies or other similar activities, in accordance with applicable laws and regulations and to participate in Company-led research such as surveys.
7. Participating Customers may terminate participation in the pilot after providing PGE no less than 30 days' notice and are subject to the noncompliance reimbursement referenced in this Tariff. At the end of the 10-year term, Participating Customers have the option to continue to participate in the pilot if it is still active, but there is no obligation to do so.