

**GOVERNMENT OF PUERTO RICO
PUBLIC SERVICE REGULATORY BOARD
PUERTO RICO ENERGY BUREAU**

IN RE: THE PERFORMANCE OF THE
PUERTO RICO ELECTRIC POWER
AUTHORITY

CASE NO.: NEPR-MI-2019-0007

SUBJECT: Updated Data Template for
Quarterly Reporting.

RESOLUTION AND ORDER

I. Introduction

On May 14, 2019, the Energy Bureau of the Puerto Rico Public Service Regulatory Board (“Energy Bureau”) issued a Resolution and Order (“May 14 Resolution”) in which it determined that it would be in the public interest to commence as soon as possible Puerto Rico Electric Power Authority’s (PREPA) data gathering process to help the Energy Bureau and the stakeholders in developing measures, metrics, and targets and to provide useful information for developing incentive and penalty mechanisms. The May 14 Resolution required PREPA to provide quarterly reports of key performance metrics/indicators, beginning September 15, 2019.

On April 8, 2021, the Energy Bureau issued a Resolution and Order (“April 8 Resolution”) that listed a set of prospective metrics to be reported, initially by PREPA and later by LUMA¹, once LUMA commenced operations and took charge of the reporting. Among the metrics that PREPA was ordered to report to the Energy Bureau were those for OSHA, call abandonment rate, distribution line inspections, transmission line inspections, T&D substation inspections, and overtime.

On May 21, 2021, the Energy Bureau issued a Resolution and Order (“May 21 Resolution”) through which it established baselines and benchmarks for certain performance metrics. The Energy Bureau included several Attachments in the May 21 Resolution through which it specified (i) metrics with baselines and benchmarks;² (ii) metrics with baselines;³ (iii) metrics not required for quarterly reporting;⁴ and (iv) new metrics to be reported.⁵ The Energy Bureau noted that the metrics in Attachment D were additional to the metrics required in Part V.B of the April 8 Resolution. The Energy Bureau ordered PREPA and LUMA to submit the required quarterly reports using the Excel template (“Data Template”) included as part of the May 21 Resolution.

Since then, LUMA has submitted quarterly reports on system data using this data template.⁶

On January 20, 2023, LUMA filed a document titled *Submission of Performance Metrics Report for October through December 2022, and September 2022 Reliability Metrics, and in partial compliance with order of January 12, 2023* (“January 20 Motion”). As part of its submission, LUMA provided a file containing its performance data identified as “Resumen Metricas Master_Jan2023.xlsx” along with supporting data workbooks.

On March 3, 2023, LUMA filed a document titled *Submission of Corrected Spreadsheets Submitted on Performance Metrics Quarterly Report for October through December 2022, and*

¹ LUMA Energy, LLC as Management Co., and LUMA Energy ServCo, LLC (collectively, “LUMA”)

² May 21 Resolution, Attachment A.

³ *Id.*, Attachment B.

⁴ *Id.*, Attachment C.

⁵ *Id.*, Attachment D.

⁶ See filings of June 22, 2021; September 20, 2021; December 22, 2021; March 21, 2022; June 20, 2022; October 20, 2022; and January 20, 2022.



Corrected Data on Reliability Metrics for July through August 2022 (“March 3 Motion”). In this submission, LUMA submitted the “Resumen Metricas Master_Jan2023_Revised.xlsx” file along with supporting data spreadsheets to correct data values and provide missing data.

II. Discussion

Over the course of the past few years, the data template has been modified as metrics have been added and renamed at the request of both LUMA and the Energy Bureau.

The Energy Bureau now sees the need to formally re-issue the data template that was provided with the May 21 Resolution.⁷ To create the new data template, the Energy Bureau made the intended changes to the “Resumen Metricas Master_Jan 2023.xlsx” file that LUMA submitted on January 20, 2023. Revised data from the March 3 Motion was then copied into the new data template.

The modifications include formatting changes to ensure compatibility with the Energy Bureau’s data review process, and other changes to reflect metric additions, metric renaming, subgroup renaming, and unit corrections. More detail on these changes is provided below.

1. Formatting changes

The template now has 2 additional columns: “Reported by” and “Metric Category”. It is assumed that all metrics on the “T&D” tab are reported by LUMA and all metrics on the “Generation” tab are reported by PREPA. The highlighted rows with the metric categories previously interspersed throughout the workbook have been removed.

2. New additions

The Bureau had been calculating certain metrics separately using data that LUMA is already reporting and now directs LUMA to report these values directly.

Metric Name	Methodology
SAIDI (T&D) 12-month rolling average	Sum of “Monthly SAIDI” for the past 12-months
SAIFI (T&D) 12-month rolling average	Sum of “Monthly SAIFI” for the past 12-months
Monthly SAIDI (T&D)	Sum of the monthly distribution and transmission substation level SAIDI
Monthly SAIFI (T&D)	Sum of the monthly distribution and transmission substation level SAIFI
Percent of customer calls answered	“Number of calls answered” divided by “Number of calls received”
Number of curtailed hours from RPS-eligible capacity- Total	Sum of curtailed hours of all RPS-eligible capacity
Total installed BESS capacity	Sum of “Total installed BESS capacity” across all regions
Incremental installed BESS capacity	Sum of “Incremental installed BESS capacity” across all regions
Total of BESS installations	Sum of “Total number of BESS installations” across all regions
Incremental number of BESS installations	Sum of “Incremental number of BESS installations” across all regions

3. Renaming

These metrics have been renamed in the template.

Old Name	New Name
CAIDI	Monthly CAIDI
SAIDI Distribution	Monthly SAIDI Distribution
SAIDI Transmission Substation	Monthly SAIDI Transmission Substation

⁷ See attachment “UpdatedQuarterlyReportingTemplate_NEPR_MI_2019_0007.xlsx.”



SAIFI Distribution	Monthly SAIFI Distribution
SAIFI Transmission Substation	Monthly SAIFI Transmission Substation
Average price	Average fuel price
Average price vs. forecast price	Average fuel price vs. forecast price
Total budgeted head counts by employee type	Budgeted headcounts by employee type
Total actual head counts by employee type	Actual headcounts by employee type
Operational expenses vs. budget (excluding fuel) (by directorate)	Operational expenses vs. budget
Number of customers enrolled in extended payment plans	Number of customers enrolled in extended payment plans by class
Number of customers defaulting on extended payment plans	Number of customers defaulting on extended payment plans by class
Number of customers completing extended payment plans by class	Number of customers completing extended payment plans by class

4. Subgroup creation

These metrics have been renamed to better use the Sub-Group field.

Old Name	New Metric Name	New Subgroup Name
DSO (Days Sales Outstanding) - Total customers	DSO (Days Sales Outstanding)	Total customers
DSO (Days Sales Outstanding) - government customers	DSO (Days Sales Outstanding)	Government customers
DSO (Days Sales Outstanding) - general customers	DSO (Days Sales Outstanding)	General customers
Inventory turns (annualized percent of value)**	Inventory turns (annualized percent of value)	Total
Warehouse General Depot (Distribution Center)	Inventory turns (annualized percent of value)	Warehouse General Depot (Distribution Center)
Warehouse T & D (Region & District)	Inventory turns (annualized percent of value)	Warehouse T & D (Region & District)
Warehouse Plants	Inventory turns (annualized percent of value)	Warehouse Plants
Capital expenses vs. budget (system)	Capital expenses vs. budget	System
Capital expenses vs. budget - Transmission & Distribution	Capital expenses vs. budget	Transmission & Distribution
Capital expenses vs. budget - Generation	Capital expenses vs. budget	Generation
Capital expenses vs. budget- Customer Service	Capital expenses vs. budget	Customer Service
Capital expenses vs. budget- Administrative & General (Exec)	Capital expenses vs. budget	Administrative & General (Exec)
Capital expenses vs. budget- Planning and Environmental Protection	Capital expenses vs. budget	Planning and Environmental Protection

5. Correction of Units

In the Excel template in the May 21 Resolution, these metrics were supposed to be reported in MWh. However, the magnitudes of the numbers LUMA has reported seem low and look like they were instead reported in GWh. From now on, the template will request these metrics to be reported in GWh.

- Purchased energy from thermal PPOA's
- Generation from RPS-eligible PPOA's (by unit)



The Energy Bureau **ORDERS** LUMA to clarify whether the data it has reported through December 2022 for the above-specified metrics were reported in GWh or MWh, and to ensure that the April 20 submission provides historical and new data in GWh.

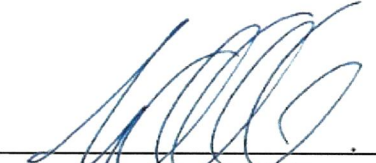
III. Conclusion

The Energy Bureau **ORDERS** LUMA and PREPA to use the data template provided as part of this Resolution for all future quarterly report submissions, starting with the January, February, and March 2023 data to be submitted on April 20, 2023.


The Energy Bureau **ORDERS** PREPA to submit its performance on the following metrics for February through May 2021: OSHA Fatalities, OSHA Severity Rate, and OSHA Days Away, Restricted or Transferred (DART) Rate. This data should be submitted with the quarterly report on April 20, 2023.

The Energy Bureau **ORDERS** PREPA and LUMA to provide data on the additional metrics identified for reporting in the April 8 Resolution, which include call abandonment rate, distribution line inspections, transmission line inspections, T&D substation inspections, and overtime. As this data was ordered to be provided in the April 8 Resolution, PREPA and LUMA must provide this information from May 2021 through March 2023 and submit it with the quarterly report on April 20, 2023.


Be it notified and published.


Edison Avilés Deliz
Chairman


Lillian Mateo Santos
Associate Commissioner


Ferdinand A. Ramos Soegaard
Associate Commissioner


Sylvia B. Ugarte Araujo
Associate Commissioner


Antonio Torres Miranda
Associate Commissioner

CERTIFICATION

I hereby certify that the majority of the members of the Puerto Rico Energy Bureau has so agreed on April 3, 2023. I also certify that on April 3, 2023, a copy of this Resolution and Order was notified by electronic mail to margarita.mercado@us.dlapiper.com, jmarrero@diazvaz.law, hrivera@jrsp.pr.gov. I also certify that today, April 3, 2023, I have proceeded with the filing of the Resolution and Order issued by the Puerto Rico Energy Bureau.

For the record, I sign this in San Juan, Puerto Rico, today April 3, 2023.


Sonia Seda Gaztambide
Clerk

