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COMMONWEALTH OF PUERTO RICO
PUBLIC SERVICE REGULATORY BOARD
PUERTO RICO ENERGY BUREAU

IN RE:	**CASE NO.:** NEPR-MI-2022-0001
ENERGY EFFICIENCY AND DEMAND RESPONSE TRANSITION PERIOD PLAN	**SUBJECT:** Motion to Supplement the FY2026 Annual Report and Submit Corrected FY2026 Fourth Quarter Report Information

MOTION TO SUPPLEMENT THE FY2026 ANNUAL REPORT AND SUBMIT CORRECTED FY2026 FOURTH QUARTER REPORT INFORMATION

TO THE HONORABLE PUERTO RICO ENERGY BUREAU:

COME now **LUMA Energy, LLC** ("ManagementCo"), and **LUMA Energy ServCo, LLC** ("ServCo"), (jointly referred to as "LUMA"), and respectfully state and request the following:

I. Introduction

LUMA submits this Motion to supplement its fiscal year 2026 ("FY2026") Consolidated Transition Period Plan ("TPP") and Demand Response ("DR") Administrative Costs Annual Report ("FY2026 Annual Report") and correct information in its FY2026 Fourth Quarter Consolidated TPP and DR Administrative Costs Quarterly Report ("Q4 Report"), both filed on August 14, 2026. Specifically, LUMA provides the final FY2026 Energy Efficiency ("EE") Rider Account balance and Exhibit 1, containing the FY2026 installed-measures information and corrected Q4 data. LUMA respectfully requests that the Energy Bureau of the Puerto Rico Public Service Regulatory Board ("Energy Bureau") accept these submissions and deem LUMA in

compliance with the FY2026 annual and Q4 TPP and DR administrative costs reporting requirements.

As the Transmission and Distribution system operator, LUMA implements EE and DR programs required by law and mandated by the Energy Bureau. Through June 30, 2026, these programs operated under the TPP, which established pilot programs to be scaled up or transformed into permanent programs. LUMA consolidated the FY2026 Annual Report into the Q4 Report to streamline reporting and avoid overlapping submissions, while identifying two items to be supplemented by October 28, 2026: the final EE Rider Account balance and FY2026 installed-measures information. This Motion provides that supplemental information and corrects Q4 data following LUMA's internal quality assurance and quality control review.

II. Relevant Background and Procedural History

1. On June 21, 2022, LUMA submitted a proposed EE and DR Transition Period Plan describing quick-start programs and associated FY2023 and FY2024 budgets. *See Motion Submitting Proposed EE/DR Transition Period Plan*, Case No. NEPR-MI-2021-0006, *In Re: Demand Response Plan Review, Implementation and Monitoring*, June 21, 2022, Exhibit 1. By Resolution and Order dated February 16, 2023 ("February 16th Order"), the Energy Bureau amended and approved the proposed plan and required annual reports within one hundred and twenty (120) days after each program year and quarterly reports within sixty (60) days after each quarter. *See* February 16th Order, p. 18.

2. The Energy Bureau established cost-recovery and reporting requirements for DR programs during 2023. In its Resolution and Order issued on July 31, 2023 ("July 31st Order"), in Case No. NEPR-MI-2020-0001, *In Re: Permanent Rate of the Puerto Rico Electric Power Authority* ("Permanent Rate Case"), the Energy Bureau directed LUMA to include DR programs

in its proposed Power Purchase Cost Adjustment ("PPCA") factors. *See* July 31st Order, pp. 8, 10. In a Resolution and Order issued on August 29, 2023 ("August 29th Order"), the Energy Bureau accepted the budget for the DR program, now known as CBES, provided for recovery of DR administrative costs through the PPCA, and required quarterly administrative-cost reports within forty-five (45) days after each fiscal quarter, with the Q4 report including the year-end report. *See* August 29th Order, pp. 3–4, n. 8.

3. On November 29, 2023, the Energy Bureau issued a Resolution and Order ("November 29th Order") extending the TPP by one year and directing LUMA to submit a revised plan. *See* November 29th Order, p. 7. LUMA submitted the revised plan on December 20, 2023, retaining the quarterly and annual reporting requirements, extending them to FY2025, and adding the DR administrative-cost quarterly reports. *See Motion to Submit Revised TPP and Other Information Requested Under the Resolution and Order of November 29, 2023*, Exhibit 1, § 6.0.

4. On February 14, 2024, LUMA requested approval to consolidate the TPP and DR administrative-cost quarterly reports into one report due within forty-five (45) days after each fiscal quarter, and the TPP annual and DR administrative-cost year-end reports into one report due within one hundred and twenty (120) days after each fiscal year. *See Motion to Submit Second Quarterly Report on Administrative Costs and Expenditures of TPP DR Programs and Request to Consolidate Reporting Requirements* ("February 14th Motion"), pp. 8–10. The Energy Bureau approved that consolidation on March 21, 2024. *See* March 21, 2024 Resolution and Order, p. 2.

5. On June 11, 2024, the Energy Bureau approved an EE charge to cover EE program costs. *See* June 11, 2024 Resolution and Order in the Permanent Rate Case, p. 8. On October 23, 2024, the Energy Bureau extended the TPP by six months, directed LUMA to file a revised TPP and a permanent CBES proposal, and required development of a backup-generator DR emergency

program, now referred to as the Emergency Load Reduction Program ("ELRP"). *See* October 23, 2024 Resolution and Order, pp. 3–5.

6. On October 28, 2024, LUMA requested approval of a template for consolidated annual reporting. *See Motion to Submit Consolidated Transition Period Plan and Demand Response Administrative Cost Annual Report and Request for Approval of Template for These Annual Reports* ("October 28th Motion"). On January 24, 2025, the Energy Bureau approved the proposed template subject to additional information, modifications to three tables, and detailed tables compatible with Microsoft Excel. *See* January 24, 2025 Resolution and Order, pp. 4–6.

7. On January 31, 2025, LUMA proposed extending the revised TPP through June 30, 2026, and submitted a permanent CBES proposal. *See Motion to Submit Revised Energy Efficiency and Demand Response Transition Period Plan and Request for Modification of Deadlines Relating to Three-Year Energy Efficiency and Demand Response Plan*, pp. 2, 7, Exhibit 1; *Motion to Submit Permanent Customer Battery Energy Sharing Program Proposal in Compliance with Resolutions and Orders of October 23, 2024, and December 5, 2024*, Exhibit 1.

8. On April 30, 2025, the Energy Bureau issued a Resolution and Order ("April 30th Order") directing LUMA to submit an ELRP proposal and an expanded summer 2025 CBES proposal ("CBES+"). *See* April 30th Order, pp. 2, 4. LUMA submitted CBES+ on May 8, 2025. *See Motion to Submit Proposal for Expanded Customer Battery Energy Sharing Program and Revised Technical Conference Presentation in Compliance with Resolution and Order of April 30, 2025*, Exhibit 1.

9. On May 20, 2025, the Energy Bureau approved CBES+ and the remaining portions of the permanent CBES proposal subject to conditions and monthly reporting during June–October 2025. *See* May 20, 2025 Resolution and Order, p. 2. On May 29, 2025, the Energy Bureau

determined that LUMA had fulfilled those conditions and approved CBES+ and the remaining unapproved portions of the permanent CBES proposal. *See* May 29, 2025 Resolution and Order, pp. 2–3.

10. LUMA submitted its ELRP proposal on May 21, 2025. *See Motion to Submit Proposal for Emergency Load Reduction Program in compliance with Resolution and Order of April 30, 2025*. The Energy Bureau approved that proposal through October 31, 2025, by Resolution and Order dated June 20, 2025.

11. On June 26, 2025, the Energy Bureau directed LUMA to file an amended FY2026 EE program plan within specified budget limits, while providing that "LUMA retains flexibility to allocate its budget among its proposed EE resource acquisition programs." *See* June 26, 2025 Resolution and Order ("June 26, 2025 Order"), pp. 3–4. LUMA submitted the amended plan and revised budget on July 22, 2025. *See Motion to Submit Amended Energy Efficiency Program Plan in Compliance with Resolution and Order of June 26, 2025*. On August 19, 2025, the Energy Bureau approved the amended TPP for FY2026 implementation ("FY2026 TPP").

12. On January 9, 2026, the Energy Bureau released LUMA from monthly ELRP reporting and directed it to report ELRP implementation progress and the information previously submitted in monthly CBES reports in its consolidated quarterly reports. *See* January 9, 2026 Resolution and Order, p. 2. On June 26, 2026, LUMA notified the Energy Bureau that it had reallocated $1.8 million from Residential Rebates to Residential EE Kits within the FY2026 EE portfolio budget, as permitted by the June 26, 2025 Order. *See Informative Motion on Reallocation of Funding Within the EE Program Portfolio Budget*, pp. 3–4.

13. On August 14, 2026, LUMA filed the Q4 Report, covering TPP, CBES, and ELRP implementation, together with the FY2026 Annual Report consolidated into that submission. *See*

Motion to Submit Fiscal Year 2026 Fourth Quarter Consolidated Transition Period Plan and Demand Response Administrative Costs Quarterly Report and Fiscal Year 2026 Consolidated Transition Period Plan and Demand Response Administrative Costs Annual Report ("August 14th Motion"), p. 9, Exhibit 1. LUMA explained that consolidation avoided separate filings in close succession containing overlapping implementation and cost information, supported efficient resource use and planning, and provided the Energy Bureau with quarterly and annual information in one submission. *See* August 14th Motion, p. 9.

14. LUMA further stated in the August 14th Motion that it would supplement the FY2026 Annual Report on or before October 28, 2026, identified as the regulatory deadline, with two outstanding items: (i) the final FY2026 Energy Efficiency Rider Account balance, to be determined upon completion of fiscal-year financial closing processes in October 2026; and (ii) FY2026 Exhibit 2 – Installed Measures by Sector, Segment, and Program, for which additional data analysis was required.

III. Supplemental FY2026 Annual Report Information

15. As contemplated in the August 14th Motion, LUMA reports that the final FY2026 Energy Efficiency Rider Account balance is approximately $1.1 million. Certain invoices related to FY2026 Energy Efficiency Program activities remain outstanding; therefore, the final balance remains subject to adjustments upon receipt and reconciliation of these invoices. Accordingly, any remaining funds will be retained in the Energy Efficiency Rider Account until completion of the Three Year Plan, at which time the funds would be reconciled based on the final program costs and expenditures. Any remaining balance would be exclusively to support the continued implementation, administration, and delivery of Energy Efficiency Programs throughout their lifecycle, ensuring that all available rider-funded resources are dedicated to achieving the

Programs' intended objectives and long-term effectiveness. LUMA also submits the FY2026 Annual Report's Exhibit 2 – Installed Measures by Sector, Segment, and Program, attached to this Motion as *Exhibit 2*. These submissions provide the two outstanding items identified in the August 14th Motion. LUMA respectfully requests that the Energy Bureau accept them as supplemental information to the FY2026 Annual Report.

IV. Corrections to FY2026 Q4 Report Information

16. Following completion of its internal quality assurance and quality control review, LUMA determined that preliminary data in Exhibit 2 to the Q4 Report required correction. The corrections concern Residential Rebates installed-measure counts, EE Kits fulfilled orders, and lifetime energy savings for In-Store Discounts. *Exhibit 1* provides the corrected and final FY2026 values, including Q4. LUMA respectfully requests that the Energy Bureau accept those corrected values for the affected Q4 data.

WHEREFORE, LUMA respectfully requests that the Energy Bureau: (i) **accept** the supplemental FY2026 Annual Report information provided in this Motion and *Exhibit 1*; (ii) **accept** the corrected Q4 Report information in *Exhibit 1* for the Residential Rebates installed-measure counts, EE Kits fulfilled orders, and lifetime energy savings for In-Store Discounts; and (iii) **deem** LUMA in compliance with the FY2026 annual and Q4 TPP and DR administrative costs reporting requirements established in this proceeding.

RESPECTFULLY SUBMITTED.

In San Juan, Puerto Rico, this 28th day of October 2026.

We hereby certify that we filed this Motion using the electronic filing system of this Energy Bureau and that we will send an electronic copy of this Motion to the Independent Office for Consumer Protection at hrivera@jrsp.pr.gov; PREPA at arivera@gmlex.net and mvalle@gmlex.net; and the remaining recipients at agraitfe@agraitlawpr.com, info@sesapr.org, bfrench@veic.org, shanson@veic.org, evand@sunrun.com, jordgraham@tesla.com,

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Exhibit 1

[FY2026 Annual Report Exhibit 2 – Installed Measures by Sector, Segment, and Program]
[*Excel document to be submitted via email*]