



# California Energy Commission

Title: QFER Consumption Data Submission Portal (DSP) Workshop

Presenters: Steven Mac and Brian Yeung

Date: June 24, 2025



# **QFER Consumption Data Submission Portal (DSP) Workshop**



# House Rules

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- Please keep your mic muted.
- If you have a question or comment, please enter it into the Q&A.



# Agenda

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- Overview of Changes
- Which data? Which apps?
- Formatting Rules
- DSP Registration
- DSP Walkthrough
- Resources



# Overview of Changes





# What's different?

## ➤ Current Submission Process

- Email data to QFERCOM@energy.ca.gov

## ➤ New Submission Process

- Log into the DSP, select QFER consumption app, upload, pass validation, and review

## ➤ DSP will come online in August 2025

- **Note:** Reporting requirements remain the same. Main differences are the submission tool, and the type of file and formatting accepted (e.g. CSV, not Excel)





# **Which data? Which apps?**



# Report and App Matrix

Report Number	Schedule Number	Report/Schedule Name	Required to submit	Energy Type	DSP app to use
1306A	Schedule 1	UDC Electricity Sales/Deliveries Quarterly Report	<i>all</i> UDCs, electric utilities	Electricity	QFER consumption 1306A
	Schedule 2	UDC Retail Rate Description Quarterly Report	UDCs, electric utilities whose annual peak demand in the last 2 years > or equal to 200 MW	Electricity	
	Schedule 3	Quarterly UDC Report of Retailers	PGE, SCE, and SDGE	Electricity	<i>none, arrange SFTP with staff</i>
1306B		LSE Quarterly Report	LSEs that are not UDCs such as CCAs and ESPs	Electricity	QFER consumption 1306B
1308B	Schedule 1	Gas Utility Deliveries and Reveue Quarterly Report	Gas utilities	Gas	QFER consumption 1308B
	Schedule 2	Gas Utility Report of Retailers Quarterly Report	PGE, SDGE, and SoCalGas	Gas	<i>none, arrange SFTP with staff</i>
1308C		Gas Retailer Quarterly Report	Marketers, Retailers, and Energy Service Providers	Gas	QFER consumption 1308C





# 1306A UDC Electricity Sales/Deliveries Quarterly Report, Schedule 1

	A	B	C	D	E	F	G	H	I	J
1	Company Number	Year	Month Number	County Number	Customer Type	Rate Class	NAICS Code	Number of Customers	Sales/Delivery Amount (kWh)	Revenue (\$)
2										
3										

- Template above is for Schedule 1 only. As before, ALL electric utilities are required to submit Schedule 1.
- Updated formatting/validations:
  - Valid values for **Customer Type** (uppercase letter): B (Bundled), D (Direct Access), C (Community Choice Aggregator), O (for BART, PGE only)
  - **Rate Class** is a required field only for UDCs with annual average peak demand 200 MW or higher in past two years.
  - **NAICS Code** must be valid, six-digits.



# 1306A UDC Retail Rate Description Quarterly Report, Schedule 2

	A	B	C	D	E
1	<b>Company Number</b>	<b>Year</b>	<b>Quarter Number</b>	<b>Retail Rate Class</b>	<b>Description</b>
2					
3					

- Only electric utilities whose annual peak demand in the last two years is 200 MW or greater are required to submit Schedule 2. This is the same as before.
- Updated formatting/validations:
  - **Quarter Number** must be an integer value (i.e., 1, 2, 3, or 4)



# 1306A Quarterly UDC Report of Retailers, Schedule 3

Attention 1306A Schedules 3 submitters (PGE, SCE, and SDGE):

[QFERconsumptionDSP@energy.ca.gov](mailto:QFERconsumptionDSP@energy.ca.gov)

email us above to:

- (1) coordinate with staff SFTP submission of 1306A Schedule 3
  - (2) obtain the latest 1306A Schedule 3 submission instructions
- and/or
- (3) get a copy of the 1306A Schedule 3 csv template

Please include "1306A Schedule 3 submission instructions" in the subject line

*You will **not** be able to use the DSP to submit 1306A Schedule 3*



# 1306B LSE Quarterly Report

	A	B	C	D	E	F	G	H	I
1	Company Name	Year	Month Number	Utility Delivery Company (UDC)	Customer Group	County Number	Number of Customers	Sales Amount (kWh)	Revenue (\$)
2									
3									

- All LSEs that are not electric utilities are required to submit this report.
- Updated formatting/validations:
  - Valid values for **Utility Delivery Company (UDC)** (exactly as shown): SCE, PGE, and/or SDGE
  - Valid values for **Customer Group** (spelled exactly): Residential, Commercial, Industrial, Other



# 1308B Gas Utility Deliveries and Revenue Quarterly Report Schedule 1

	A	B	C	D	E	F	G	H	I
1	Company Number	Year	Month Number	County Number	NAICS Code	Rate Code	Number of Customers	Delivery Volume (therms)	Revenue (\$)
2									
3									

- Template above is for Schedule 1 only. As before, ALL gas utilities are required to submit Schedule 1.
- Updated formatting/validations:
  - **NAICS Code** must be valid, six-digits
  - Valid values for **Rate Code**: 10, 20, 30, 40, 50, 60, 70, 80



# 1308B Gas Utility Report of Retailers Quarterly Report, Schedule 2

Attention 1308B Schedules 2 submitters (PGE, SoCalGas, and SDGE):

[QFERconsumptionDSP@energy.ca.gov](mailto:QFERconsumptionDSP@energy.ca.gov)

email us above to:

- (1) coordinate with staff SFTP submission of 1308B Schedule 2
  - (2) obtain the latest 1308B Schedule 2 submission instructions
- and/or
- (3) get a copy of the 1308B Schedule 2 file template

Please include "1308B Schedule 2 submission instructions" in the subject line

*You will **not** be able to use the DSP to submit 1308B Schedule 2*





## 1308C Gas Retailer Quarterly Report

	A	B	C	D	E	F	G	H
1	Company Number	Year	Month	County Number	Customer Group	Number of Customers	Delivery Volume (therms)	Revenue (\$)
2								
3								

- All gas retailers are required to submit this report. Examples of such retailers are energy service providers and gas marketers.
- Updated formatting/validations:
  - Valid values for **Customer Group** (spelled exactly): Residential, Commercial, Industrial, TEOR, UEG, Other



# Formatting Rules



# Formatting Rules (1/3)

#1 File type must be comma separated values (CSV)...NOT Excel like before



File name: CEC 1306A Schedule 1.xlsx

Save as type: Excel Workbook (\*.xlsx)



File name: CEC 1306A Schedule 1.csv

Save as type: CSV (Comma delimited) (\*.csv)

#2 Must have the correct field order (i.e. must follow the CSV templates exactly)



	A	B	C	D	E	F	G	H	I	J
1	Year	Month	CompanyNumber	CountyNumber	CustomerType	RateClass	NAICSCode	NumberOfCustomers	SalesDeliveryAmount	Revenue



	A	B	C	D	E	F	G	H	I	J
1	CompanyNumber	Year	Month	CountyNumber	CustomerType	RateClass	NAICSCode	NumberOfCustomers	SalesDeliveryAmount	Revenue



# Formatting Rules (2/3)

#3 Extra information such as headers, calculations/formulas, macros, and notes will not be accepted.

Example, headers:



1	State of California									
2	Energy Commission									
3	CEC 1306A Schedule 1: UDC Electricity Sales/Deliveries Quarterly Report									
4										
5										
6	Company Number	Year	Month Number	County Number	Customer Type	Rate Class	NAICS Code	Number of Customers	Sales/ Delivery Amount (KWh)	Revenue (\$)
7										
8										



	A	B	C	D	E	F	G	H	I	J
1	Company Number	Year	Month Number	County Number	Customer Type	Rate Class	NAICS Code	Number of Customers	Sales/Delivery Amount (kWh)	Revenue (\$)
2										
3										

#4 Do not include commas anywhere in the file. Do not have blank cells or non-numeric characters in the Company Number, Year, Month, County Number, Customer Count, Sales, and Revenue fields.



# Formatting Rules (3/3)

#5 Extra rows will not be accepted; only include required info



	A	B	C	D	E	F	G	H	I	J
1	CompanyNumber	Year	Month	CountyNumber	CustomerType	RateClass	NAICSCode	NumberOfCustomers	SalesDeliveryAmount	Revenue
2	12345	2025	7	34 B	D1	RE0000		12437	77116819	3825900.00
3	12345	2025	7	34 B		C1	RE1100	26022	42058613	4416369.00
4	12345	2025	7	34 B		D1	RE1100	8943	74552477	2065611.00
5										
6	12345	2025	7	34 B		CB	611210	52	28988207	813908.00
7	12345	2025	7	34 B		CB	611210	63	12282110	5824622.00

#6 Any Company Number, County Number, and NAICS code values that contain a leading 0 (zero) should be formatted as TEXT data type.

Note: For more information on this rule or if you need assistance, please contact [QFERconsumptionDSP@energy.ca.gov](mailto:QFERconsumptionDSP@energy.ca.gov)

#7 Reminder: Any errors detected by the DSP must be fixed



# DSP Registration





# How to Register

DSP landing page

The screenshot shows the DSP landing page with the following elements:

- Top Navigation Bar:** Contains links for [Log In](#), [Register](#) (highlighted with a red box), and [Settings](#).
- Header:** Includes the [CA.GOV](#) logo, a home icon, the **CALIFORNIA ENERGY COMMISSION** logo, and a [Contact](#) link with a question mark icon.
- Main Content Area:** Features a large blue banner with the text **Log In**.
- Registration Form:** Includes input fields for **Email address** and **Password**, a ☐ **Remember me?** checkbox, a **Log in** button, and links for [Forgot your password?](#) and [Register as a new user](#).

A red arrow points to the **Register** button with the text: **1st time user & submitter? Click here!**



# Profile Creation

## Register

**Name**

**Email**

**Company or Organization****Job Title**

**Phone Number**

+1 9165555555

**Fax Number**

**Password Requirements:**

- Length between 8-100 characters.
- Contains at least 1 number.
- Contains at least 1 special character. ^ \$ \* . [ ] { } ( ) ? - " ! # % & / \ , > < ' : ; | \_ ~ ` ' + =
- Contains at least 1 uppercase letter.
- Contains at least 1 lowercase letter.

**Password**

See Requirements Above.

**Confirm password**

Register

22



# Selecting Your App (1/2)

☐ Show hidden apps

Access ▾	Application	Function	Description
USER	<a href="#">Power Source Disclosure</a>	<a href="#">Activity</a> <a href="#">Hide</a>	
USER	<a href="#">QFER Intake</a>	<a href="#">Activity</a> <a href="#">Hide</a>	
USER	<a href="#">Residential Solar Permit Reporting (SB 379)</a>	<a href="#">Activity</a> <a href="#">Hide</a>	Residential Solar Permit Reporting for SB 379
USER	<a href="#">QFER Consumption 1306A</a>	<a href="#">Activity</a> <a href="#">Hide</a>	UDC Electricity Sales/Deliveries Quarterly Report
USER	<a href="#">QFER Consumption 1308C</a>	<a href="#">Activity</a> <a href="#">Hide</a>	Gas Retailer Quarterly Report

#1--click this box to show hidden apps



# Selecting Your App (2/2)

☒ Show hidden apps

Access	Application	Function	Description
NONE	<a href="#">PIIRA Reports Submission</a>	Submission for Petroleum Industry Information Reporting Act (PIIRA) Forms	
NONE	<a href="#">QFER Consumption 1306B</a>	LSE Quarterly Report	
NONE	<a href="#">QFER Consumption 1308B</a>	Gas Utility Deliveries and Revenue Quarterly Report	
USER	<a href="#">Power Source Disclosure</a>	Activity  Hide	
USER	<a href="#">QFER Intake</a>	Activity  Hide	
USER	<a href="#">Residential Solar Permit Reporting (SB 379)</a>	Activity  Hide	Residential Solar Permit Reporting for SB 379
USER	<a href="#">QFER Consumption 1306A</a>	Activity  Hide	UDC Electricity Sales/Deliveries Quarterly Report
USER	<a href="#">QFER Consumption 1308C</a>	Activity  Hide	Gas Retailer Quarterly Report

#2--click this link to get to the landing page for the QFER Consumption 1306B app



# Requesting App Access (1/3)

## QFER Consumption 1306B LSE Quarterly Electricity Sales Data

Click "1306B" on the right to submit the quantity of electricity sold by load serving entities (LSEs such as CCAs and ESPs) that are not utility distribution companies (UDCs). LSEs listed below are required to submit this report. This information is used in analyzing electricity demand for local planning and state energy forecasts

### **1306B LSE Quarterly Report (1306B)**

Community choice aggregators (CCAs)

Electric service providers (ESPs)

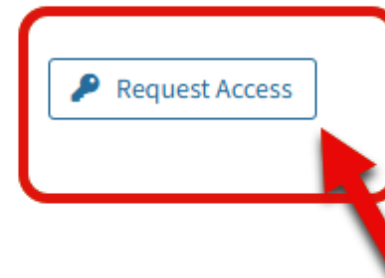
City of Cerritos

Eastside Power Authority

Power and Water Resource Pooling Authority

[LSEs'--not UDCs--instructions for electricity data](#)

[LSE csv template for 1306B](#)



#3--click this button to request access to 1306B app



# Requesting App Access (2/3)

## QFER Consumption 1306B LSE Quarterly Electricity Sales Data

Click "1306B" on the right to submit the quantity of electricity sold by load serving entities (LSEs such as CCAs and ESPs) that are not utility distribution companies (UDCs). LSEs listed below are required to submit this report. This information is used in analyzing electricity demand for local planning and state energy forecasts

### **1306B LSE Quarterly Report (1306B)**

Community choice aggregators (CCAs)

Electric service providers (ESPs)

City of Cerritos

Eastside Power Authority

Power and Water Resource Pooling Authority

[LSEs'--not UDCs--instructions for electricity data](#)

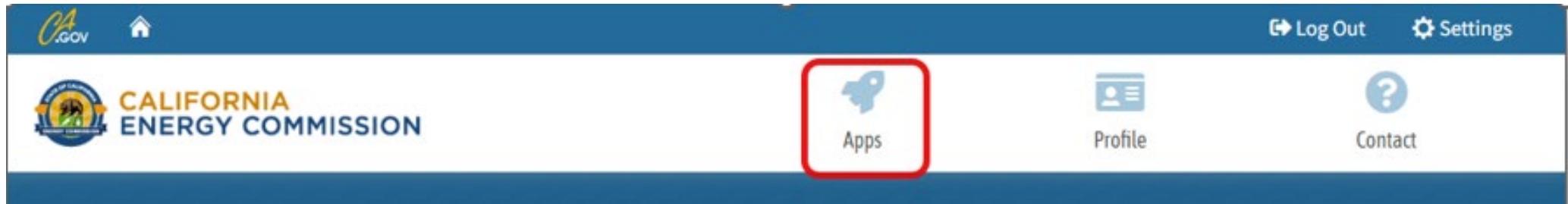
[LSE csv template for 1306B](#)

**Access request submitted**







# Requesting App Access (3/3)








# How to Access Apps




Log OutSettings

**CALIFORNIA**  
ENERGY COMMISSION



















  
Apps

  
Profile

  
Contact

## My Apps

☐ Show hidden apps

Access	Application	Function	Description
 USER	<a href="#">Power Source Disclosure</a>	 Activity  Hide	
 USER	<a href="#">QFER Intake</a>	 Activity  Hide	
 USER	<a href="#">Residential Solar Permit Reporting (SB 379)</a>	 Activity  Hide	Residential Solar Permit Reporting for SB 379
 USER	<a href="#">QFER Consumption 1306A</a>	 Activity  Hide	UDC Electricity Sales/Deliveries Quarterly Report
 USER	<a href="#">QFER Consumption 1306B</a>	 Activity  Hide	LSE Quarterly Report
 USER	<a href="#">QFER Consumption 1308C</a>	 Activity  Hide	Gas Retailer Quarterly Report



# DSP Walkthrough



# DSP Walkthrough Overview

- Step 1: Log into DSP
- Step 2: Select app on DSP landing page
- Step 3: Make entity selections
- Step 4: Upload data
- Step 5: Data validation and review
- Step 6: Attestation and complete submission





# Step 1: Log into DSP

## Log In

**Email address**

**Password**

☐ **Remember me?**

[Forgot your password?](#)



# Step 2: Select App (1/2)

## My Apps

☐ Show hidden apps

Access	Application	Function	Description
USER	<a href="#">Power Source Disclosure</a>	<div><div>Activity</div><div>Hide</div></div>	
USER	<a href="#">QFER Intake</a>	<div><div>Activity</div><div>Hide</div></div>	
USER	<a href="#">Residential Solar Permit Reporting (SB 379)</a>	<div><div>Activity</div><div>Hide</div></div>	Residential Solar Permit Reporting for SB 379
USER	<a href="#">QFER Consumption 1306A</a>	<div><div>Activity</div><div>Hide</div></div>	UDC Electricity Sales/Deliveries Quarterly Report
USER	<a href="#">QFER Consumption 1306B</a>	<div><div>Activity</div><div>Hide</div></div>	LSE Quarterly Report
USER	<a href="#">QFER Consumption 1308C</a>	<div><div>Activity</div><div>Hide</div></div>	Gas Retailer Quarterly Report





# Step 2: Select App (2/2)

## QFER Consumption 1306B LSE Quarterly Electricity Sales Data

Click "1306B" on the right to submit the quantity of electricity sold by load serving entities (LSEs such as CCAs and ESPs) that are not utility distribution companies (UDCs). LSEs listed below are required to submit this report. This information is used in analyzing electricity demand for local planning and state energy forecasts

### **1306B LSE Quarterly Report (1306B)**


Community choice aggregators (CCAs)

Electric service providers (ESPs)

City of Cerritos

Eastside Power Authority

Power and Water Resource Pooling Authority

 CEC Report

>

**1306B**

click here to  
upload 1306B  
data

[LSEs'--not UDCs--instructions for electricity data](#)

[LSE csv template for 1306B](#)



# Step 3: Entity and Reporting Period (1/2)

QFER Consumption 1306B

Overview Schedule Summary Declaration

#1

Entity Selection

-- Select Entity --

field entry box

Year Selection

Company name listed in the scrollable menu

Next »

QFER Consumption 1306B

Entity Selection

California Energy Company

Year Selection

2025

Reporting Period

Q2

#2

Next »



# Step 3: Entity and Reporting Period (2/2)

QFER Consumption 1306B

## Entity Selection

 California Energy Company ▼

## Year Selection

 2025 ▼

## Reporting Period

 Q1 ▼

This entity has already submitted for this year and period

Next »



# Step 4: Upload Data (1/2)

## QFER Consumption 1306B

[Overview](#)[Schedule](#)[Summary](#)[Declaration](#)

### LSE Quarterly Electricity Sales Data

Select Files

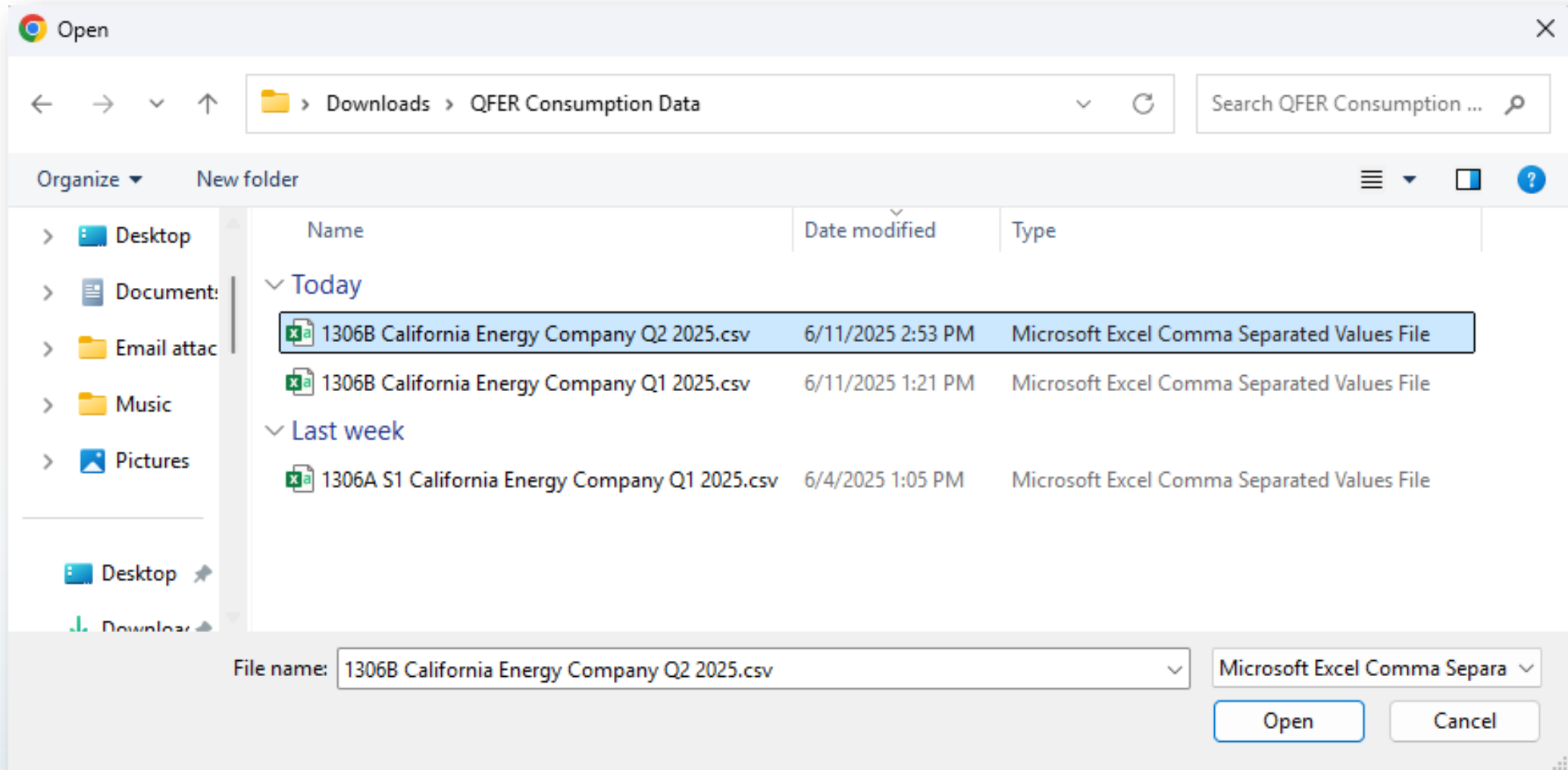
Drag and drop files or click here to upload file(s)

**Only CSV files allowed.**

[« Previous](#)[Next »](#)



# Step 4: Upload Data (2/2)





# Step 5: Data Validation & Review


## QFER Consumption 1306B

[Overview](#)[Schedule](#)[Summary](#)[Declaration](#)

### LSE Quarterly Electricity Sales Data

Select Files

Drag and drop files or click here to upload file(s)

 1306B California Energy Company Q2 2025.csv

**Only CSV files allowed.**

Number of validation errors: **1**  
Number of validation warnings: **0**  
Files with errors prevent submission

Type	Message	Line #
Error	Must be a valid UDC name	2

Download Complete Warning/Error List



# Step 5: Data Validation & Review (1/3)

Notification Type	Error (all apps)	Warning (1306A and 1308B only)
DSP User Response	MUST fix	SHOULD investigate
Examples	NAICS code: 0003 County Number: -24	County Number: 14 instead of 41

Example: This 1306B test data contains one **error** (“PG&E” instead of “PGE”). Must fix it

	A	B	C	D	E	F	G	H	I
1	CompanyNum	Year	MonthNumber	UtilityDeliveryCompany	CustomerGroup	CountyNumber	NumberOfCustomers	SalesAmount	Revenue
2	12345	2025	4	PG&E	Industrial	34	2	84320	257624554
3	12345	2025	4	PGE	Commercial	34	3	83216	291479048
4	12345	2025	4	PGE	Residential	34	4	94325	132129853
5	12345	2025	4	PGE	Other	34	5	83209	186970055
6	12345	2025	5	PGE	Industrial	34	2	90374	18552584
7	12345	2025	5	PGE	Commercial	34	1	72074	10453603
8	12345	2025	5	PGE	Residential	34	2	48800	99751909
9	12345	2025	5	PGE	Other	34	3	95569	101674148
10	12345	2025	6	PGE	Industrial	34	4	89265	269718931
11	12345	2025	6	PGE	Commercial	34	5	78074	217635258
12	12345	2025	6	PGE	Residential	34	2	64318	522197523
13	12345	2025	6	PGE	Other	34	1	71190	2805261
14									



# Step 5: Data Validation & Review (2/3)

## QFER Consumption 1306B

[Overview](#)[Schedule](#)[Summary](#)[Declaration](#)

### Data Submittal Summary

#### Schedule Summary

1306B California Energy Company Q1 2025.csv

Record Count:12

filename

number of records in the file

available for 1306B and 1308C





# Step 5: Data Validation & Review (3/3)

## QFER Consumption 1306A

[Overview](#)[Schedule 1](#)[Schedule 2](#)[Summary](#)[Declaration](#)

### Data Submittal Summary

#### Schedule 1 Summary

filename

1306A S1 California Energy Company Q1 2025.csv

available for 1306A and 1308B

totals for three of the report's fields

Reporting Period	Number of Records	Sum of Customers	Sum of Sales (kWh)	Sum of Revenue (\$)
January	5	16	435444	886756094.00
February	6	17	448100	1221431372.00
March	7	18	458013	1454152138.00

number of data records for each month

#### Schedule 2

No file uploaded

this shows if you skipped the upload for Schedule 2



# Step 6: Attestation

## QFER Consumption 1306A

[Overview](#)[Schedule 1](#)[Schedule 2](#)[Summary](#)[Declaration](#)

### Attestation Form

I certify under penalty of perjury that the information contained in this report is true, correct, and complete to the best of my knowledge. I am authorized to make this report on behalf of my company.

[« Previous](#)[Submit](#)

Clicking Submit will upload your files.

Please do not navigate away from this page or close your browser until submission is confirmed.



# **Resources to help with transition**



# Data Validation

These will help you prepare QFER consumption data for submission:

- Updated submission instructions, *available in July 2025*  
(the links to these will be posted on the landing pages of the apps and can also be obtained by requesting copies from CEC Staff)
- QFER consumption data report CSV templates, *currently available*  
(these are also available on the landing pages of the apps; can be provided upon request)
- Data dictionary showing expected data types and lists of valid values for fields that have common errors (e.g., NAICS code, county number, customer type, UDC name, etc.).  
*Available in July 2025*
- Supplemental documents, *Available in July 2025*
- QFER Consumption Webpage, *available in July 2025*



# Instructional Resources

These resources will help you use the QFER consumption apps:

- Data Submission Portal URL (CEC will provide once available, *available in July 2025*)
- Setting a new DSP user account with MFA
  - Email address for the DSP MFA support is - [datasubmission@energy.ca.gov](mailto:datasubmission@energy.ca.gov) (please copy [QFERconsumptionDSP@energy.ca.gov](mailto:QFERconsumptionDSP@energy.ca.gov))
- DSP QFER Consumption User Guide, *available in July 2025*
- QFER Consumption Webpage, *available in July 2025*

Have any questions about using any of the DSP QFER consumption apps?

Need help preparing QFER consumption data such as formatting or passing validation?

Contact: [QFERconsumptionDSP@energy.ca.gov](mailto:QFERconsumptionDSP@energy.ca.gov)



# Demo



# Questions?



**Thank You!**