

# Utility Data Review

## Instructions

### Background

Commerce is completing its initial aggregation of utility energy assistance reports submitted in February 2022. Commerce asks utilities to review the aggregation file to ensure it accurately reflects the utility data submissions and to verify that the reported low-income programs meet the definition of “low-income” established in [WAC 194-40-030](#). The agency will provide further instruction on the statutory requirements to identify previous low-income energy assistance funding levels and those needed to meet the 2030 and 2050 targets under [RCW 19.405.120\(4\)\(a\)\(iii\)](#).

### Instructions

1. Create a free Smartsheet account using the [Smartsheet Sign-up Instructions](#) provided on the [Energy Assistance webpage](#).
2. Receive an invite from Commerce to review the aggregation file on August 1, 2022. If you did not receive an invitation, message [Austin.Scharff@commerce.wa.gov](mailto:Austin.Scharff@commerce.wa.gov)
3. Navigate to the Sec. 120 Utility Data Spreadsheet and locate your utility under the column “Utility.”
4. Verify that the data in the Program and Energy Assistance Type columns is correct for your utility.
5. Verify that the reported program type meets the definitions provided in the initial [reporting form](#). The definitions are included below:

“Crisis/Emergency Program” is typically a one-time financial assistance or arrangement to prevent or in response to service shut offs or interruptions.

“Short-term Program” refers to monthly, bi-monthly or annual payments, or other offsets to billing.

“Long-term Program” refers to measures that create sustained energy savings, such as heating, air-sealing, insulation, windows or other energy efficiency measures.

6. Verify that the information in the History and Years columns is correct for your utility's programs.
7. Verify that the correct category is selected under the "Low-income participation" column for each of your utility's programs. The three categories are the following:
  - a. Low-income only (Only low-income households participate in the program)
  - b. A program open to more than just low-income households and low-income households are identified (This is a program available open to more than just low-income households and the utility knows how many low-income households participate in the program and how much funding goes to these households)
  - c. No low-income participants or low-income household participation was not tracked (there are no low-income participants enrolled in the program or the number of low-income households that participate in the program and how much funding they received cannot be determined)
8. Verify whether each of your utility's programs uses the same definition of low-income that is used in [WAC 194-40-030](#). If yes, enter "Yes" in the [WAC 194-40-030](#) column. If no, enter "No" in that column. For reference, the definition of low-income in [WAC 194-40-030](#) is as follows:

"Low-income" means household incomes that do not exceed the higher of eighty percent of area median income or two hundred percent of federal poverty level, adjusted for household size.
9. If your program's definition does not align the definition low-income under [WAC 194-40-030](#), provide the program's definition of low-income in the following column entitled "Other definition."
10. Verify that the participants, bill reductions, customer assistance expenditures, program administration and operation costs, and staffing costs columns are correct. Please do not enter letters into any of these columns. If there are letters, delete them and replace them with a numeric response. Please no roman numerals either.
11. If you haven't already, save your changes. The save button is located in the top left corner underneath the "File" tab. Exit Smartsheet.
12. Review the Conservation file posted on the Energy Assistance webpage, and send any changes to [Austin.Scharff@commerce.wa.gov](mailto:Austin.Scharff@commerce.wa.gov)

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## Additional Guidance

1. Smartsheet struggles when users try to edit the same cells at the same time. This should not be a problem for users from different utilities; you will be reviewing different rows. If you have multiple folks reviewing the data for your utility, stagger your reviews to make sure that you are not writing over your colleagues' edits.
2. If you get stuck anywhere in this process, do not hesitate to reach out:  
[Austin.Scharff@commerce.wa.gov](mailto:Austin.Scharff@commerce.wa.gov)

## Thank You and Next Steps

Thank you for taking the time to review these spreadsheets. The data will be used to inform Commerce's first biennial low-income energy assistance report to the Legislature. Commerce intends for the report to be published by Jan. 1, 2023.

If you are interested in further participating in the report, attend our upcoming workshops posted on the [Energy Assistance webpage](#) and sign up for our CETA bulletin. You can sign up for the bulletin under "Sign Up for Email Updates" on the [Energy Assistance webpage](#).