



Control Number: 55094



Item Number: 1

PUC DOCKET NO. _____

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APPLICATION OF AEP TEXAS INC.
TO ADJUST ENERGY EFFICIENCY
COST RECOVERY FACTOR AND
RELATED RELIEF

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PUBLIC UTILITY COMMISSION
PUBLIC UTILITY COMMISSION
FILING CLERK
OF TEXAS

AEP TEXAS INC.'S APPLICATION

JUNE 1, 2023

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Files provided electronically on the PUCT Interchange

2023 EECRF\Final Drafts\Filing Package\AEP Texas 2024 EECRF Sch A-B-J-K-M-N-O-P-R
Final 05302023.xlsx"

AEP Texas EE Identification Notice 2023 Final 05252023.xlsx

AEP Texas Performance Bonus Calculator PY2022.xlsx

AEP TX Schedule A Page 2.xlsx

AEP TX 2023 EEPR Tables v16 (EECRF Filing).xlsx

AEP TX 2023 Sch C-E-G-H-I-Q-WPA-WPC-WPE-WPG WPH 2024.xlsx

AEP TX Schedule B Page 2.xlsx

Central Division Sch C WP.xlsx

North Division Sch C WP.xlsx

TCC 2017 Loss Analysis First (FINAL).pdf

TNC 2017 Loss Analysis (Final).pdf

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TO ADJUST ITS ENERGY	§	
EFFICIENCY COST RECOVERY	§	OF TEXAS
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AEP TEXAS INC.'S APPLICATION

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APPLICATION OF AEP TEXAS INC.	§	PUBLIC UTILITY COMMISSION
TO ADJUST ITS ENERGY	§	
EFFICIENCY COST RECOVERY	§	OF TEXAS
FACTOR AND RELATED RELIEF	§	

AEP TEXAS INC.'S APPLICATION

AEP Texas Inc. (AEP Texas) files this Application to Adjust Its Energy Efficiency Cost Recovery Factor and Related Relief in accordance with Public Utility Regulatory Act¹ (PURA) § 39.905 and 16 Tex. Admin. Code (TAC) §§ 25.181–.182. In support of its application, AEP Texas shows the following:

I. Applicant

AEP Texas is a public utility as that term is defined in PURA § 11.004(1), an electric utility as that term is defined in PURA § 31.002(6), and a transmission and distribution utility as that term is defined in PURA § 31.002(19). AEP Texas provides transmission and distribution service to over one million end-use customers across a service territory covering all or part of 92 counties in south and west Texas. AEP Texas' business address is 539 North Carancahua Street, Corpus Christi, Texas 78401.

II. Jurisdiction

The Public Utility Commission of Texas (Commission) has jurisdiction over AEP Texas' application to adjust its energy efficiency cost recovery factor (EECRF) under PURA § 39.905 and 16 TAC § 25.182.

¹ PURA is codified at Tex. Util. Code Ann. §§ 11.001 – 66.016.

III. Applicant's Authorized Representatives

AEP Texas' authorized business representative is:

Emily K. Brown
American Electric Power
212 E. 6th St.
Tulsa, Oklahoma 74199
918.599.2321 (voice)
512.481.4591 (facsimile)
Email: emcord@aep.com

AEP Texas' authorized legal representatives are:

Leila Melhem
American Electric Power Service Corporation
400 West 15th Street, Suite 1520
Austin, Texas 78701
512.481.3320 (voice)
512.481.4591 (facsimile)
Email: lmelhem@aep.com

Patrick Pearsall
Stephanie Green
Duggins Wren Mann & Romero, LLP
P.O. Box 1149
Austin, Texas 78767
512.744.9300 (voice)
512.744.9399 (facsimile)
Email: ppersall@dwmrlaw.com
sgreen@dwmrlaw.com

AEP Texas requests that all pleadings and other documents filed in this proceeding be served on each of the persons above and be emailed to aepaustintx@aep.com.

IV. Affected Persons

This application, if granted, will affect all of the retail electric providers (REPs) served by AEP Texas that serve end-use customers subject to the EECRF sought in this filing. Those end-use customers may also be affected by this application to the extent the REPs pass along the EECRF charges to their customers.

V. Background and Requested Relief

PURA § 39.905 and 16 TAC § 25.182 authorize utilities to establish an EECRF to timely recover the reasonable costs of providing a portfolio of cost-effective energy efficiency programs. In Docket No. 53679, AEP Texas' most recent EECRF proceeding, the Commission approved a total energy-efficiency revenue requirement for AEP Texas of \$26,029,727.²

² *Application of AEP Texas, Inc. to Adjust its Energy Efficiency Cost Recovery Factors and Related Relief*, Docket No. 53679, Final Order at Ordering Paragraph No. 2 (Dec. 15, 2022).

PURA § 39.905 and 16 TAC § 25.182 require a utility with an EECRF in an area in which customer choice is offered to apply no later than June 1st of each year to adjust the EECRF to recover: (i) the utility's forecasted annual energy efficiency program expenditures; (ii) evaluation, measurement, and verification (EM&V) expenses; (iii) any performance bonus earned; (iv) the preceding year's over- or under-recovery including interest; and (v) municipal and utility EECRF proceeding expenses. Accordingly, AEP Texas requests the authority to update its EECRF to collect \$24,833,529 in 2024 to reflect the following five components:

- forecasted energy-efficiency program costs of \$18,694,458 for program year 2024;
- EM&V expenses of \$233,450 for the evaluation of program year 2023;
- an adjustment of \$227,177 to account for the over-recovery of program year 2022 energy efficiency costs, including interest in the amount of \$2,941 and recovery of 2022 EM&V costs;
- recovery of \$6,077,493 representing AEP Texas' earned performance bonus for achieving demand and energy savings that exceeded its minimum goals for program year 2022; and
- rate-case expenses of \$48,768 incurred in Docket No. 53679 by AEP Texas and \$6,537.50 by municipalities as authorized by 16 TAC § 25.182(d)(3)(B).

The adjusted Rider EECRF containing the proposed cost recovery factors is provided as Attachment A to this petition.

VI. Description of Filing

Accompanying this petition are the direct testimonies and exhibits of Robert Cavazos, Pamela D. Osterloh, and Jennifer L. Jackson; Schedules A through S; and workpapers supporting the testimony and schedules. The application fully supports the relief sought by AEP Texas under PURA § 39.905 and 16 TAC § 25.182.

VII. Request for Protective Order

Schedule J contains a listing of all Energy Efficiency Service Providers (EESPs) who received incentive funds and a listing of EESPs who received more than five percent of incentive funds for 2022 along with their contracts with AEP Texas. Pursuant to 16 TAC § 25.182(d)(10)(H) and (K), such information may be treated as confidential. Accordingly, AEP Texas requests entry of the Commission's standard protective order, provided as Attachment B to this petition.

VIII. Notice

In accordance with 16 TAC § 25.182(d)(13), AEP Texas proposes to provide notice within seven days of the filing date by providing a copy of this petition to all parties to AEP Texas' most recently completed base-rate case (Docket No. 49494), AEP Texas' last EECRF case (Docket No. 53679), the Texas Department of Housing and Community Affairs, and all REPs in Texas by email in accordance with the Second Order Suspending Rules issued in Project No. 50664. In accordance with 16 TAC § 25.182(d)(14), AEP Texas will file an affidavit attesting to the completion of notice within 14 days after the application is filed.

IX. Proposed Procedural Schedule

AEP Texas proposes the following schedule for this proceeding:

Notice Completed	June 8, 2023
Proof of Notice	June 15, 2023
Intervention Deadline	July 6, 2023
Request for a Hearing	July 6, 2023
	<u>If No Hearing Requested</u>
Staff Recommendation	July 21, 2023
Parties' Proposed Order	July 28, 2023
	<u>If Hearing Requested</u>
End of discovery on AEP Texas Direct	July 6, 2023
Objections to AEP Texas Direct	July 6, 2023
Deadline for Intervenor Direct	July 7, 2023
Replies to Objections to AEP Texas Direct	July 13, 2023
Objections Intervenor Direct	July 14, 2023
Deadline for Staff Direct	July 14, 2023
End of Discovery on Intervenor Direct	July 14, 2023
End of Discovery on Staff Direct	July 21, 2023
Replies to Objections Intervenor Direct	July 21, 2023
Objections to Staff Direct	July 21, 2023
Discovery Responses on Intervenor Direct	July 21, 2023

Deadline for AEP Texas Rebuttal and Cross-Rebuttal	July 26, 2023
Discovery Responses on Staff Direct	July 26, 2023
Hearing on the Merits	August 9, 2023

X. Conclusion and Request for Relief

AEP Texas requests that the Commission:

- a. approve AEP Texas' proposed notice and method of providing notice;
- b. enter the Commission's standard protective order;
- c. approve AEP Texas' proposed procedural schedule;
- d. approve AEP Texas' proposed Rider EECRF;
- e. authorize AEP Texas to begin applying the adjusted Schedule EECRF effective March 1, 2024; and
- f. grant AEP Texas any other relief to which it is justly entitled.

RESPECTFULLY SUBMITTED,

/s/ Patrick Pearsall

AMERICAN ELECTRIC POWER SERVICE
CORPORATION

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ATTORNEYS FOR AEP TEXAS INC.

AEP TEXAS
TARIFF FOR ELECTRIC DELIVERY SERVICE

Applicable: Certified Service Area
Chapter: 6 Section: 6.1.1
Section Title: Delivery System Charges
Revision: Fourth Effective Date: March 1, 2024

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6.1.1.4.2 Rider EECRF – Energy Efficiency Cost Recovery Factors

AVAILABILITY

Rider EECRF recovers the cost of energy efficiency programs not already included in base distribution service rates and is applicable to the kWh sales of Retail Customers taking retail electric delivery service from the Company.

APPLICABILITY

The Rider EECRF is applicable to the current month’s billed kWh of each Retail Customer taking electric delivery service from the Company.

MONTHLY RATE

<u>Rate Schedule</u>	<u>Factor</u>	
Residential Service	\$0.000996 per kWh	R
Secondary Service Less than or Equal to 10 kW	\$0.000686 per kWh	R
Secondary Service Greater than 10 kW	\$0.000908 per kWh	R
Primary Service	\$0.000562 per kWh	R
Transmission Service	\$0.000000 per kW	

NOTICE

This Rate Schedule is subject to the Company’s Tariff and Applicable Legal Authorities.

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	§	

PROTECTIVE ORDER

This Protective Order governs the use of all information deemed confidential (Protected Materials) or highly confidential (Highly Sensitive Protected Materials), including information whose confidentiality is currently under dispute, by a party providing information to the Public Utility Commission of Texas (Commission) or to any other party to this proceeding.

It is ORDERED that:

1. **Designation of Protected Materials.** Upon producing or filing a document, including, but not limited to, records on a computer disk or other similar electronic storage medium in this proceeding, the producing party may designate that document, or any portion of it, as confidential pursuant to this Protective Order by typing or stamping on its face "PROTECTED PURSUANT TO PROTECTIVE ORDER ISSUED IN DOCKET NO. _____" (or words to this effect) and consecutively Bates Stamping each page. Protected Materials and Highly Sensitive Protected Materials include the documents so designated, as well as the substance of the information contained in the documents and any description, report, summary, or statement about the substance of the information contained in the documents.
2. **Materials Excluded from Protected Materials Designation.** Protected Materials must not include any information or document contained in the public files of the Commission or any other federal or state agency, court, or local governmental authority subject to the Public Information Act.¹ Protected Materials also must not include documents or information which at the time of, or prior to disclosure in, a proceeding is or was public

¹ Tex. Gov't Code § 552.001-353.

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knowledge, or which becomes public knowledge other than through disclosure in violation of this Protective Order.

3. **Reviewing Party.** For the purposes of this Protective Order, a “Reviewing Party” is any party to this docket.
4. **Procedures for Designation of Protected Materials.** On or before the date the Protected Materials or Highly Sensitive Protected Materials are provided to the Commission, the producing party is required to file with the Commission and deliver to each party to the proceeding a written statement, which may be in the form of an objection, indicating: (a) any exemptions to the Public Information Act claimed to apply to the alleged Protected Materials; (b) the reasons supporting the producing party’s claim that the responsive information is exempt from public disclosure under the Public Information Act and subject to treatment as protected materials; and (c) that counsel for the producing party has reviewed the information sufficiently to state in good faith that the information is exempt from public disclosure under the Public Information Act and merits the Protected Materials designation.
5. **Persons Permitted Access to Protected Materials.** Except as otherwise provided in this Protective Order, a Reviewing Party may access Protected Materials only through its “Reviewing Representatives” who have signed the Protective Order Certification Form (see Attachment A). Reviewing Representatives of a Reviewing Party include its counsel of record in this proceeding and associated attorneys, paralegals, economists, statisticians, accountants, consultants, or other persons employed or retained by the Reviewing Party and directly engaged in this proceeding. At the request of the PUC Commissioners, copies of Protected Materials may be produced by Commission Staff. The Commissioners and their staff must be informed of the existence and coverage of this Protective Order and will observe the restrictions of the Protective Order.
6. **Highly Sensitive Protected Material Described.** The term “Highly Sensitive Protected Materials” is a subset of Protected Materials and refers to documents or information that a producing party claims is of such a highly sensitive nature that making copies of such documents or information or providing access to such documents to employees of the Reviewing Party (except as specified herein) would expose a producing party to

unreasonable risk of harm. Highly Sensitive Protected Materials include but are not limited to: (a) customer-specific information protected by § 32.101(c) of the Public Utility Regulatory Act;² (b) contractual information pertaining to contracts that specify that their terms are confidential or that are confidential pursuant to an order entered in litigation to which the producing party is a party; (c) market-sensitive fuel price forecasts, wholesale transactions information and/or market-sensitive marketing plans; and (d) business operations or financial information that is commercially sensitive. Documents or information so classified by a producing party must bear the designation “HIGHLY SENSITIVE PROTECTED MATERIALS PROVIDED PURSUANT TO PROTECTIVE ORDER ISSUED IN DOCKET NO. _____ (or words to this effect) and must be consecutively Bates Stamped. The provisions of this Protective Order pertaining to Protected Materials also apply to Highly Sensitive Protected Materials, except where this Protective Order provides for additional protections for Highly Sensitive Protected Materials. In particular, the procedures herein for challenging the producing party’s designation of information as Protected Materials also apply to information that a producing party designates as Highly Sensitive Protected Materials.

7. **Restrictions on Copying and Inspection of Highly Sensitive Protected Material.**

Except as expressly provided herein, only one copy may be made of any Highly Sensitive Protected Materials except that additional copies may be made to have sufficient copies for introduction of the material into the evidentiary record if the material is to be offered for admission into the record. The Reviewing Party is required to maintain a record of all copies made of Highly Sensitive Protected Material and must send a duplicate of the record to the producing party when the copy or copies are made. The record must specify the location and the person possessing the copy. Highly Sensitive Protected Material must be made available for inspection only at the location or locations provided by the producing party, except as specified by Paragraph 9. Limited notes may be made of Highly Sensitive Protected Materials, and such notes must themselves be treated as Highly Sensitive Protected Materials unless such notes are limited to a description of the document and a

² Public Utility Regulatory Act, Tex. Util. Code §§ 11.001–66.016.

general characterization of its subject matter in a manner that does not state any substantive information contained in the document.

8. **Restricting Persons Who May Have Access to Highly Sensitive Protected Material.**

With the exception of Commission Staff, the Office of the Attorney General (OAG), and the Office of Public Utility Counsel (OPC), and except as provided herein, the Reviewing Representatives for the purpose of access to Highly Sensitive Protected Materials may be persons who are (a) outside counsel for the Reviewing Party, (b) outside consultants for the Reviewing Party working under the direction of Reviewing Party's counsel, or (c) employees of the Reviewing Party working with and under the direction of Reviewing Party's counsel who have been authorized by the presiding officer to review Highly Sensitive Protected Materials. The Reviewing Party must limit the number of Reviewing Representatives that review Highly Sensitive Protected Materials to the minimum number of persons necessary. The Reviewing Party is under a good faith obligation to limit access to each portion of any Highly Sensitive Protected Materials to two Reviewing Representatives whenever possible. Reviewing Representatives for Commission Staff, OAG, and OPC, for the purpose of access to Highly Sensitive Protected Materials, must consist of their respective counsel of record in this proceeding and associated attorneys, paralegals, economists, statisticians, accountants, consultants, or other persons employed or retained by them and directly engaged in these proceedings.

9. **Copies Provided of Highly Sensitive Protected Material.** A producing party is required to provide one copy of Highly Sensitive Protected Materials specifically requested by the Reviewing Party to the person designated by the Reviewing Party who must be a person authorized to review Highly Sensitive Protected Material under Paragraph 8. Representatives of the Reviewing Party who are authorized to view Highly Sensitive Protected Material may review the copy of Highly Sensitive Protected Materials at the office of the Reviewing Party's representative designated to receive the information. Any Highly Sensitive Protected Materials provided to a Reviewing Party may not be copied except as provided in Paragraph 7. The restrictions contained herein do not apply to Commission Staff, OPC, and the OAG when the OAG is representing a party to the proceeding.

10. **Procedures in Paragraphs 10-14 Apply to Commission Staff, OPC, and the OAG and Control in the Event of Conflict.** The procedures in Paragraphs 10 through 14 apply to responses to requests for documents or information that the producing party designates as Highly Sensitive Protected Materials and provides to Commission Staff, OPC, and the OAG in recognition of their purely public functions. To the extent the requirements of Paragraphs 10 through 14 conflict with any requirements contained in other paragraphs of this Protective Order, the requirements of these Paragraphs control.
11. **Copy of Highly Sensitive Protected Material to be Provided to Commission Staff, OPC and the OAG.** When, in response to a request for information by a Reviewing Party, the producing party makes available for review documents or information claimed to be Highly Sensitive Protected Materials, the producing party is required to also deliver one copy of the Highly Sensitive Protected Materials to the Commission Staff, OPC (if OPC is a party), and the OAG (if the OAG is representing a party) in Austin, Texas. Provided however, that in the event such Highly Sensitive Protected Materials are voluminous, the materials will be made available for review by Commission Staff, OPC (if OPC is a party), and the OAG (if the OAG is representing a party) at the designated office in Austin, Texas. The Commission Staff, OPC (if OPC is a party) and the OAG (if the OAG is representing a party) may request such copies as are necessary of such voluminous material under the copying procedures specified herein.
12. **Delivery of the Copy of Highly Sensitive Protected Material to Commission Staff and Outside Consultants.** The Commission Staff, OPC (if OPC is a party), and the OAG (if the OAG is representing a party) may deliver the copy of Highly Sensitive Protected Materials received by them to the appropriate members of their staff for review, provided such staff members first sign the certification specified by Paragraph 15. After obtaining the agreement of the producing party, Commission Staff, OPC (if OPC is a party), and the OAG (if the OAG is representing a party) may deliver the copy of Highly Sensitive Protected Materials received by it to the agreed, appropriate members of their outside consultants for review, provided such outside consultants first sign the certification in Attachment A.

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13. **Restriction on Copying by Commission Staff, OPC and the OAG.** Except as allowed by Paragraph 7, Commission Staff, OPC and the OAG may not make additional copies of the Highly Sensitive Protected Materials furnished to them unless the producing party agrees in writing otherwise, or, upon a showing of good cause, the presiding officer directs otherwise. Commission Staff, OPC, and the OAG may make limited notes of Highly Sensitive Protected Materials furnished to them, and all such handwritten notes will be treated as Highly Sensitive Protected Materials as are the materials from which the notes are taken.
14. **Public Information Requests.** In the event of a request for any of the Highly Sensitive Protected Materials under the Public Information Act, an authorized representative of the Commission, OPC, or the OAG may furnish a copy of the requested Highly Sensitive Protected Materials to the Open Records Division at the OAG together with a copy of this Protective Order after notifying the producing party that such documents are being furnished to the OAG. Such notification may be provided simultaneously with the delivery of the Highly Sensitive Protected Materials to the OAG.
15. **Required Certification.** Each person who inspects the Protected Materials must, before such inspection, agree in writing to the following certification found in Attachment A to this Protective Order:

I certify my understanding that the Protected Materials are provided to me pursuant to the terms and restrictions of the Protective Order in this docket, and that I have been given a copy of it and have read the Protective Order and agree to be bound by it. I understand that the contents of the Protected Materials, any notes, memoranda, or any other form of information regarding or derived from the Protected Materials must not be disclosed to anyone other than in accordance with the Protective Order and unless I am an employee of the Commission or OPC will be used only for the purpose of the proceeding in Docket No. _____. I acknowledge that the obligations imposed by this certification are pursuant to such Protective Order. Provided, however, if the information contained in the Protected Materials is obtained from independent public sources, the understanding stated herein must not apply.

In addition, Reviewing Representatives who are permitted access to Highly Sensitive Protected Material under the terms of this Protective Order must, before inspection of such

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material, agree in writing to the following certification found in Attachment A to this Protective Order:

I certify that I am eligible to have access to Highly Sensitive Protected Material under the terms of the Protective Order in this docket.

The Reviewing Party is required to provide a copy of each signed certification to Counsel for the producing party and serve a copy upon all parties of record.

16. **Disclosures between Reviewing Representatives and Continuation of Disclosure Restrictions after a Person is no Longer Engaged in the Proceeding.** Any Reviewing Representative may disclose Protected Materials, other than Highly Sensitive Protected Materials, to any other person who is a Reviewing Representative provided that, if the person to whom disclosure is to be made has not executed and provided for delivery of a signed certification to the party asserting confidentiality, that certification must be executed prior to any disclosure. A Reviewing Representative may disclose Highly Sensitive Protected Material to other Reviewing Representatives who are permitted access to such material and have executed the additional certification required for persons who receive access to Highly Sensitive Protected Material. In the event that any Reviewing Representative to whom Protected Materials are disclosed ceases to be engaged in these proceedings, access to Protected Materials by that person must be terminated and all notes, memoranda, or other information derived from the protected material must either be destroyed or given to another Reviewing Representative of that party who is authorized pursuant to this Protective Order to receive the protected materials. Any person who has agreed to the foregoing certification is required to continue to be bound by the provisions of this Protective Order so long as it is in effect, even if no longer engaged in these proceedings.
17. **Producing Party to Provide One Copy of Certain Protected Material and Procedures for Making Additional Copies of Such Materials.** Except for Highly Sensitive Protected Materials, which must be provided to the Reviewing Parties under Paragraph 9, and voluminous Protected Materials, the producing party is required to provide a Reviewing Party one copy of the Protected Materials upon receipt of the signed certification described in Paragraph 15. Except for Highly Sensitive Protected Materials, a Reviewing Party may

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make further copies of Protected Materials for use in this proceeding according to this Protective Order, but a record must be maintained as to the documents reproduced and the number of copies made, and upon request the Reviewing Party is required to provide the party asserting confidentiality with a copy of that record.

18. **Procedures Regarding Voluminous Protected Materials.** 16 Texas Administrative Code (TAC) § 22.144(h) will govern production of voluminous Protected Materials. Voluminous Protected Materials will be made available in the producing party's voluminous room, in Austin, Texas, or at a mutually agreed upon location, Monday through Friday, 9:00 a.m. to 5:00 p.m. (except on state or Federal holidays), and at other mutually convenient times upon reasonable request.
19. **Reviewing Period Defined.** The Protected Materials may be reviewed only during the Reviewing Period, which will commence upon entry of this Protective Order and continue until the expiration of the Commission's plenary jurisdiction. The Reviewing Period will reopen if the Commission regains jurisdiction due to a remand as provided by law. Protected materials that are admitted into the evidentiary record or accompanying the evidentiary record as offers of proof may be reviewed throughout the pendency of this proceeding and any appeals.
20. **Procedures for Making Copies of Voluminous Protected Materials.** Other than Highly Sensitive Protected Materials, Reviewing Parties may take notes regarding the information contained in voluminous Protected Materials made available for inspection or they may make photographic, mechanical or electronic copies of the Protected Materials, subject to the conditions in this Protective Order; provided, however, that before photographic, mechanical or electronic copies may be made, the Reviewing Party seeking photographic, mechanical or electronic copies must provide written confirmation of the receipt of copies listed on Attachment B of this Protective Order identifying each piece of Protected Materials or portions thereof the Reviewing Party will need.
21. **Protected Materials to be Used Solely for the Purposes of These Proceedings.** All Protected Materials must be made available to the Reviewing Parties and their Reviewing Representatives solely for the purposes of these proceedings. Access to the Protected Materials may not be used in the furtherance of any other purpose, including, without

limitation: (a) any other pending or potential proceeding involving any claim, complaint, or other grievance of whatever nature, except appellate review proceedings that may arise from or be subject to these proceedings; or (b) any business or competitive endeavor of whatever nature. Because of their statutory regulatory obligations, these restrictions do not apply to Commission Staff or OPC.

22. **Procedures for Confidential Treatment of Protected Materials and Information Derived from Those Materials.** Protected Materials, as well as a Reviewing Party's notes, memoranda, or other information regarding or derived from the Protected Materials are to be treated confidentially by the Reviewing Party and must not be disclosed or used by the Reviewing Party except as permitted and provided in this Protective Order. Information derived from or describing the Protected Materials must be maintained in a secure place and must not be placed in the public or general files of the Reviewing Party except in accordance with the provisions of this Protective Order. A Reviewing Party must take all reasonable precautions to insure that the Protected Materials including notes and analyses made from Protected Materials that disclose Protected Materials are not viewed or taken by any person other than a Reviewing Representative of a Reviewing Party.
23. **Procedures for Submission of Protected Materials.** If a Reviewing Party tenders for filing any Protected Materials, including Highly Sensitive Protected Materials, or any written testimony, exhibit, brief, motion or other type of pleading or other submission at the Commission or before any other judicial body that quotes from Protected Materials or discloses the content of Protected Materials, the confidential portion of such submission must be filed and served in sealed envelopes or other appropriate containers endorsed to the effect that they contain Protected Material or Highly Sensitive Protected Material and are sealed pursuant to this Protective Order. If filed at the Commission, such documents must be marked "PROTECTED MATERIAL" and must be filed under seal with the presiding officer and served under seal to the counsel of record for the Reviewing Parties. The presiding officer may subsequently, on his/her own motion or on motion of a party, issue a ruling respecting whether or not the inclusion, incorporation or reference to Protected Materials is such that such submission should remain under seal. If filing before a judicial body, the filing party: (a) must notify the party which provided the information

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within sufficient time so that the producing party may seek a temporary sealing order; and (b) must otherwise follow the procedures in Rule 76a, Texas Rules of Civil Procedure.

24. **Maintenance of Protected Status of Materials during Pendency of Appeal of Order Holding Materials are not Protected Materials.** In the event that the presiding officer at any time in the course of this proceeding finds that all or part of the Protected Materials are not confidential or proprietary, by finding, for example, that such materials have entered the public domain or materials claimed to be Highly Sensitive Protected Materials are only Protected Materials, those materials will nevertheless be subject to the protection afforded by this Protective Order for three (3) full working days, unless otherwise ordered, from the date the party asserting confidentiality receives notice of the presiding officer's order. Such notification will be by written communication. This provision establishes a deadline for appeal of a presiding officer's order to the Commission. In the event an appeal to the Commissioners is filed within those three (3) working days from notice, the Protected Materials must be afforded the confidential treatment and status provided in this Protective Order during the pendency of such appeal. Neither the party asserting confidentiality nor any Reviewing Party waives its right to seek additional administrative or judicial remedies after the Commission's denial of any appeal.
25. **Notice of Intent to Use Protected Materials or Change Materials Designation.** Parties intending to use Protected Materials must notify the other parties prior to offering them into evidence or otherwise disclosing such information into the record of the proceeding. During the pendency of Docket No. _____ at the Commission, in the event that a Reviewing Party wishes to disclose Protected Materials to any person to whom disclosure is not authorized by this Protective Order, or wishes to have changed the designation of certain information or material as Protected Materials by alleging, for example, that such information or material has entered the public domain, such Reviewing Party must first file and serve on all parties written notice of such proposed disclosure or request for change in designation, identifying with particularity each of such Protected Materials. A Reviewing Party will at any time be able to file a written motion to challenge the designation of information as Protected Materials.

26. **Procedures to Contest Disclosure or Change in Designation.** In the event that the party asserting confidentiality wishes to contest a proposed disclosure or request for change in designation, the party asserting confidentiality must file with the appropriate presiding officer its objection to a proposal, with supporting affidavits, if any, within five (5) working days after receiving such notice of proposed disclosure or change in designation. Failure of the party asserting confidentiality to file such an objection within this period will be deemed a waiver of objection to the proposed disclosure or request for change in designation. Within five (5) working days after the party asserting confidentiality files its objection and supporting materials, the party challenging confidentiality may respond. Any such response must include a statement by counsel for the party challenging such confidentiality that he or she has reviewed all portions of the materials in dispute and, without disclosing the Protected Materials, a statement as to why the Protected Materials should not be held to be confidential under current legal standards, or that the party asserting confidentiality for some reason did not allow such counsel to review such materials. If either party wishes to submit the material in question for in camera inspection, it must do so no later than five (5) working days after the party challenging confidentiality has made its written filing.
27. **Procedures for Presiding Officer Determination Regarding Proposed Disclosure or Change in Designation.** If the party asserting confidentiality files an objection, the appropriate presiding officer will determine whether the proposed disclosure or change in designation is appropriate. Upon the request of either the producing or Reviewing Party or upon the presiding officer's own initiative, the presiding officer may conduct a prehearing conference. The burden is on the party asserting confidentiality to show that such proposed disclosure or change in designation should not be made. If the presiding officer determines that such proposed disclosure or change in designation should be made, disclosure must not take place earlier than three (3) full working days after such determination unless otherwise ordered. No party waives any right to seek additional administrative or judicial remedies concerning such presiding officer's ruling.
28. **Maintenance of Protected Status during Periods Specified for Challenging Various Orders.** Any party electing to challenge, in the courts of this state, a Commission or presiding officer determination allowing disclosure or a change in designation will have a

period of ten (10) days from: (a) the date of an unfavorable Commission order; or (b) if the Commission does not rule on an appeal of an interim order, the date an appeal of an interim order to the Commission is overruled by operation of law, to obtain a favorable ruling in state district court. Any party challenging a state district court determination allowing disclosure or a change in designation will have an additional period of ten (10) days from the date of the order to obtain a favorable ruling from a state appeals court. Finally, any party challenging a determination of a state appeals court allowing disclosure or a change in designation will have an additional period of ten (10) days from the date of the order to obtain a favorable ruling from the state supreme court, or other appellate court. All Protected Materials must be afforded the confidential treatment and status provided for in this Protective Order during the periods for challenging the various orders referenced in this paragraph. For purposes of this paragraph, a favorable ruling of a state district court, state appeals court, Supreme Court or other appellate court includes any order extending the deadlines in this paragraph.

29. **Other Grounds for Objection to Use of Protected Materials Remain Applicable.** Nothing in this Protective Order precludes any party from objecting to the use of Protected Materials on grounds other than confidentiality, including the lack of required relevance. Nothing in this Protective Order constitutes a waiver of the right to argue for more disclosure, provided, however, that unless the Commission or a court orders such additional disclosure, all parties will abide by the restrictions imposed by the Protective Order.
30. **Protection of Materials from Unauthorized Disclosure.** All notices, applications, responses or other correspondence must be made in a manner which protects Protected Materials from unauthorized disclosure.
31. **Return of Copies of Protected Materials and Destruction of Information Derived from Protected Materials.** Following the conclusion of these proceedings, each Reviewing Party must, no later than thirty (30) days following receipt of the notice described below, return to the party asserting confidentiality all copies of the Protected Materials provided by that party pursuant to this Protective Order and all copies reproduced by a Reviewing Party, and counsel for each Reviewing Party must provide to the party asserting confidentiality a letter by counsel that, to the best of his or her knowledge,

information, and belief, all copies of notes, memoranda, and other documents regarding or derived from the Protected Materials (including copies of Protected Materials) that have not been so returned, if any, have been destroyed, other than notes, memoranda, or other documents which contain information in a form which, if made public, would not cause disclosure of the substance of Protected Materials. As used in this Protective Order, “conclusion of these proceedings” refers to the exhaustion of available appeals, or the running of the time for the making of such appeals, as provided by applicable law. If, following any appeal, the Commission conducts a remand proceeding, then the “conclusion of these proceedings” is extended by the remand to the exhaustion of available appeals of the remand, or the running of the time for making such appeals of the remand, as provided by applicable law. Promptly following the conclusion of these proceedings, counsel for the party asserting confidentiality will send a written notice to all other parties, reminding them of their obligations under this Paragraph. Nothing in this Paragraph prohibits counsel for each Reviewing Party from retaining two (2) copies of any filed testimony, brief, application for rehearing, hearing exhibit or other pleading which refers to Protected Materials provided that any such Protected Materials retained by counsel will remain subject to the provisions of this Protective Order.

32. **Applicability of Other Law.** This Protective Order is subject to the requirements of the Public Information Act, the Open Meetings Act,³ the Texas Securities Act⁴ and any other applicable law, provided that parties subject to those acts will notify the party asserting confidentiality, if possible under those acts, prior to disclosure pursuant to those acts. Such notice is not required where the Protected Materials are sought by governmental officials authorized to conduct a criminal or civil investigation that relates to or involves the Protected Materials, and those governmental officials aver in writing that such notice could compromise the investigation and that the governmental entity involved will maintain the confidentiality of the Protected Materials.
33. **Procedures for Release of Information under Order.** If required by order of a governmental or judicial body, the Reviewing Party may release to such body the

³ Tex. Gov't Code § 551.001–.146.

⁴ Tex. Rev. Civ. Stat. Ann. arts. 581–1 to 581–43.

confidential information required by such order; provided, however, that: (a) the Reviewing Party must notify the producing party of the order requiring the release of such information within five (5) calendar days of the date the Reviewing Party has notice of the order; (b) the Reviewing Party must notify the producing party at least five (5) calendar days in advance of the release of the information to allow the producing party to contest any release of the confidential information; and (c) the Reviewing Party must use its best efforts to prevent such materials from being disclosed to the public. The terms of this Protective Order do not preclude the Reviewing Party from complying with any valid and enforceable order of a state or federal court with competent jurisdiction specifically requiring disclosure of Protected Materials earlier than contemplated herein. The notice specified in this section is not required where the Protected Materials are sought by governmental officials authorized to conduct a criminal or civil investigation that relates to or involves the Protected Materials, and those governmental officials aver in writing that such notice could compromise the investigation and that the governmental entity involved will maintain the confidentiality of the Protected Materials.

34. **Best Efforts Defined.** The term “best efforts” as used in the preceding paragraph requires that the Reviewing Party attempt to ensure that disclosure is not made unless such disclosure is pursuant to a final order of a Texas governmental or Texas judicial body, the written opinion of the Texas Attorney General sought in compliance with the Public Information Act, or the request of governmental officials authorized to conduct a criminal or civil investigation that relates to or involves the Protected Materials. The Reviewing Party is not required to delay compliance with a lawful order to disclose such information but is simply required to timely notify the party asserting confidentiality, or its counsel, that it has received a challenge to the confidentiality of the information and that the Reviewing Party will either proceed under the provisions of §552.301 of the Public Information Act, or intends to comply with the final governmental or court order. Provided, however, that no notice is required where the Protected Materials are sought by governmental officials authorized to conduct a criminal or civil investigation that relates to or involves the Protected Materials, and those governmental officials aver in writing that such notice could compromise the investigation and that the governmental entity involved will maintain the confidentiality of the Protected Materials.

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35. **Notify Defined.** “Notify” for purposes of Paragraphs 32, 33 and 34 means written notice to the party asserting confidentiality at least five (5) calendar days prior to release; including when a Reviewing Party receives a request under the Public Information Act. However, the Commission, OAG, or OPC may provide a copy of Protected Materials to the Open Records Division of the OAG as provided herein.
36. **Requests for Non-Disclosure.** If the producing party asserts that the requested information should not be disclosed at all, or should not be disclosed to certain parties under the protection afforded by this Protective Order, the producing party must tender the information for in camera review to the presiding officer within ten (10) calendar days of the request. At the same time, the producing party is required to file and serve on all parties its argument, including any supporting affidavits, in support of its position of non-disclosure. The burden is on the producing party to establish that the material should not be disclosed. The producing party must serve a copy of the information under the classification of Highly Sensitive Protected Material to all parties requesting the information that the producing party has not alleged should be prohibited from reviewing the information.
- Parties wishing to respond to the producing party’s argument for non-disclosure must do so within five working days. Responding parties should explain why the information should be disclosed to them, including why disclosure is necessary for a fair adjudication of the case if the material is determined to constitute a trade secret. If the presiding officer finds that the information should be disclosed as Protected Material under the terms of this Protective Order, the presiding officer will stay the order of disclosure for such period of time as the presiding officer deems necessary to allow the producing party to appeal the ruling to the Commission.
37. **Sanctions Available for Abuse of Designation.** If the presiding officer finds that a producing party unreasonably designated material as Protected Material or as Highly Sensitive Protected Material, or unreasonably attempted to prevent disclosure pursuant to Paragraph 36, the presiding officer may sanction the producing party pursuant to 16 TAC § 22.161.

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38. **Modification of Protective Order.** Each party will have the right to seek changes in this Protective Order as appropriate from the presiding officer.
39. **Breach of Protective Order.** In the event of a breach of the provisions of this Protective Order, the producing party, if it sustains its burden of proof required to establish the right to injunctive relief, will be entitled to an injunction against such breach without any requirements to post bond as a condition of such relief. The producing party will not be relieved of proof of any element required to establish the right to injunctive relief. In addition to injunctive relief, the producing party will be entitled to pursue any other form of relief to which it is entitled.

ATTACHMENT A

Protective Order Certification

I certify my understanding that the Protected Materials are provided to me pursuant to the terms and restrictions of the Protective Order in this docket and that I have received a copy of it and have read the Protective Order and agree to be bound by it. I understand that the contents of the Protected Materials, any notes, memoranda, or any other form of information regarding or derived from the Protected Materials must not be disclosed to anyone other than in accordance with the Protective Order and unless I am an employee of the Commission or OPC will be used only for the purpose of the proceeding in Docket No. _____. I acknowledge that the obligations imposed by this certification are pursuant to such Protective Order. Provided, however, if the information contained in the Protected Materials is obtained from independent public sources, the understanding stated here will not apply.

Signature

Party Represented

Printed Name

Date

I certify that I am eligible to have access to Highly Sensitive Protected Material under the terms of the Protective Order in this docket.

Signature

Party Represented

Printed Name

Date

ATTACHMENT B

I request to view/copy the following documents:

Document Requested	# of Copies	Non-Confidential	Protected Materials and/or Highly Sensitive Protected Materials

Signature

Party Represented

Printed Name

Date

PUBLIC UTILITY COMMISSION OF TEXAS

**APPLICATION OF
AEP TEXAS INC.
TO ADJUST ITS
ENERGY EFFICIENCY COST RECOVERY FACTOR AND RELATED RELIEF**

**DIRECT TESTIMONY OF
ROBERT CAVAZOS
FOR
AEP TEXAS INC.**

June 1, 2023

TESTIMONY INDEX

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EXHIBITS

<u>EXHIBIT</u>	<u>DESCRIPTION</u>
EXHIBIT RC-1	Docket No. 53679 AEP Texas Proceeding Expenses with Supporting Attorney Affidavit
EXHIBIT RC-2	Docket No. 53679 Municipal Expenses

1 I. INTRODUCTION

2 Q. PLEASE STATE YOUR NAME, POSITION, AND BUSINESS ADDRESS.

3 A. My name is Robert Cavazos. I am the Energy Efficiency & Consumer Programs Manager
4 for AEP Texas Inc. My business address is 539 N. Carancahua, Corpus Christi, Texas
5 78401.

6 Q. PLEASE STATE YOUR EDUCATIONAL AND PROFESSIONAL BACKGROUND.

7 A. I received a Bachelor of Business Administration degree from Texas A&M University
8 – Corpus Christi in 1998. From 1986 until 1993, I served as a meter reader with Central
9 Power and Light Company, the predecessor to AEP Texas. In 1993, I transferred to
10 the Customer Service Center as a Sr. Telephone Representative and later to the after-
11 hour dispatch center. In 1996, I was appointed to the position of Lead Telephone
12 Representative and in 1998 became Customer Service Supervisor. In 2002, I held the
13 position of Demand Side Management Coordinator and in 2004, transferred to
14 Competitive Retail Relations as a Market Specialist. In 2005, I transferred to AEP's
15 Human Resource (HR) department as a HR Field Representative and prior to my
16 departure, I had held the position as a Senior HR Consultant. In early 2014, I accepted
17 the position of Business Operations Supervisor and by mid-July had accepted my
18 current position as the Energy Efficiency & Consumer Programs Manager for the
19 former AEP Texas Central Company (TCC) and AEP Texas North Company (TNC),
20 now AEP Texas, overseeing the implementation and administration of energy

1 efficiency programs in compliance with the Public Utility Regulatory Act (PURA)¹ and
2 with Public Utility Commission of Texas (Commission) rules for such programs.

3 Q. HAVE YOU PREVIOUSLY FILED TESTIMONY BEFORE ANY REGULATORY
4 AGENCY?

5 A. Yes, I have previously filed testimony before the Commission in the following energy
6 efficiency cost recovery factor (EECRF) dockets: Docket No. 44717; Docket
7 No. 44718; Docket No. 45928; Docket No. 45929; Docket No. 47236; Docket No.
8 48422; Docket No. 49592; Docket No. 50892; Docket No. 52199; and Docket No.
9 53679.

10 Q. DO YOU SPONSOR ANY OF THE SCHEDULES THAT ACCOMPANY AEP
11 TEXAS' FILING?

12 A. Yes, I sponsor Schedule D. In addition, I co-sponsor Schedules A, J, P, and S with
13 AEP Texas witness Pamela D. Osterloh, and Schedules A and C with AEP Texas
14 witness Jennifer L. Jackson.

15 Q. PLEASE DESCRIBE THE AEP TEXAS ENERGY EFFICIENCY AND
16 CONSUMER PROGRAMS DEPARTMENT.

17 A. The AEP Texas Energy Efficiency and Consumer Programs (EE/CP) Department
18 consists of 7 employee positions, each with certain designated responsibilities for the

¹ PURA is codified at Tex. Util. Code Ann. §§ 11.001–66.016

1 design, implementation, and overall administration of energy efficiency and demand
2 response programs for AEP Texas.

3 The EE/CP employees are responsible for administering standard offer
4 programs (SOPs) and market transformation programs (MTPs) to achieve the mandated
5 goals for energy efficiency. Program administration includes outreach activities,
6 application review, contract execution, on-site inspections of work submitted, invoice
7 review and processing, website maintenance, monitoring of the programs, and energy
8 efficiency expense accounting. In addition, the EE/CP employees ensure compliance
9 with regulatory rules and statutory requirements by providing statutorily mandated
10 energy efficiency opportunities for all eligible customers through third-party
11 contractors on a non-discriminatory, market-neutral basis.

12

13 **II. PURPOSE OF TESTIMONY AND SUMMARY OF AEP TEXAS' FILING**

14 Q. WHAT IS THE PURPOSE OF YOUR DIRECT TESTIMONY?

15 A. The purpose of my testimony is to:

- 16 • provide a summary of the relief sought by AEP Texas in this proceeding
17 and of its filing;
- 18 • provide an overview of the policy considerations for recovery of AEP
19 Texas' projected costs for its energy efficiency programs to be
20 implemented in program year (PY) 2024 through AEP Texas' adjusted
21 EECRF for PY 2024, as contemplated by PURA § 39.905 and 16 Tex.
22 Admin. Code § 25.182(d) (TAC);
- 23 • provide information regarding the amount to be included in AEP Texas'
24 adjusted EECRF in PY 2024 to account for its over-recovery of energy
25 efficiency revenues for programs implemented in PY 2022;
- 26 • provide information regarding AEP Texas' performance bonus for its
27 energy efficiency results in PY 2022, as contemplated in 16 TAC
28 § 25.182(e), to be recovered through its adjusted EECRF in 2024; and

- provide information regarding recovery of 2022 EECRF proceeding expenses incurred in Docket No. 53679 by AEP Texas and the intervening municipalities to be recovered through its adjusted EECRF in PY 2024.

Q. PLEASE DESCRIBE AEP TEXAS' FILING.

A. AEP Texas' filing consists of my direct testimony and the direct testimony of two other witnesses (Osterloh and Jackson). Ms. Osterloh's direct testimony addresses:

- the energy efficiency costs that AEP Texas incurred for its PY 2022 programs;
- the Evaluation, Measurement and Verification (EM&V) costs actually incurred in 2022 for the evaluation of PY 2021 programs as well as EM&V costs projected to be incurred in 2024 for the evaluation of PY 2023 programs;
- energy efficiency results from AEP Texas' PY 2022 programs;
- AEP Texas' energy efficiency goals for PY 2024 as established by the Commission's rule;
- the impact of the industrial identification notice as provided for in 16 TAC § 25.181(u);
- the programs that AEP Texas will offer in PY 2024 to meet its energy efficiency objectives; and
- the costs AEP Texas projects to incur in PY 2024 in connection with these energy efficiency programs and objectives.

Ms. Jackson's direct testimony describes the design of the adjusted EECRF, the energy efficiency cost assignment among the EECRF rate classes to be recovered through the adjusted EECRF, and the billing determinants used to develop the adjusted EECRF.

Filed concurrently with the direct testimony of AEP Texas' witnesses are Schedules A through R, which include the information that the Commission has specified should be provided in support of a sufficient request for the adjusted EECRF. Support for the reasonableness of costs incurred in PY 2022 is included within the

1 schedules of this filing. AEP Texas has also included Schedule S, AEP Texas'
2 Amended 2023 Energy Efficiency Plan and Report (EEPR) filed in Docket No. 54470.

3 Q. WHAT RELIEF DOES AEP TEXAS SEEK IN THIS PROCEEDING?

4 A. AEP Texas requests the Commission approve an adjustment to AEP Texas' EECRF to
5 recover \$24,833,529, which reflects the following components:

- 6 (1) recovery of \$18,694,458 for AEP Texas which is the forecasted
7 PY 2024 energy efficiency program expenditures;
- 8 (2) refund to customers in the amount of \$227,177 representing the
9 over-recovery of actual energy efficiency costs for 2022 (includes
10 interest and recovery of 2022 EM&V costs);
- 11 (3) recovery of \$6,077,493 representing AEP Texas' 2022 performance
12 bonus for achieving demand and energy savings that exceeded its
13 minimum goals to be achieved in 2022;
- 14 (4) recovery of \$55,305 representing AEP Texas' 2022 EECRF
15 proceeding expenses incurred in Docket No. 53679, including
16 expenses necessary to reimburse intervening municipalities, as
17 authorized by 16 TAC § 25.182(d)(3); and
- 18 (5) recovery of \$233,450 for AEP Texas' share of the EM&V
19 cost to evaluate PY 2023.

20 Q. PLEASE BRIEFLY SUMMARIZE THE CONCLUSIONS PRESENTED IN YOUR
21 TESTIMONY.

22 A. My testimony demonstrates the following:

- 23 (1) The components AEP Texas includes in its request to adjust its 2024
24 EECRF have been properly calculated in accordance with the
25 applicable standards and criteria.
- 26 (2) AEP Texas' PY 2022 performance bonus calculation comports fully
27 with the applicable provisions of the Commission rule.
- 28 (3) It is reasonable and in accordance with the applicable Commission
29 rule to include an adjustment to reflect PY 2022 over-recovered
30 revenues in the adjusted 2024 EECRF.

(4) AEP Texas' proceeding expenses incurred in Docket No. 53679, including those expenses incurred to reimburse intervening municipalities, were reasonable and necessary and are properly included in this filing for recovery in the adjusted 2024 EECRF.

(5) AEP Texas' application, testimony, and supporting schedules satisfy all of the requirements, as set forth in 16 TAC § 25.181(d), for approval of the requested adjustment to its 2024 EECRF to recover all of the components described in my direct testimony and fully supported by AEP Texas' other witnesses.

III. POLICY CONSIDERATIONS FOR RECOVERY OF ENERGY EFFICIENCY EXPENDITURES

A. Statutory Policies

Q. WHAT ARE THE STATUTORY POLICY CONSIDERATIONS THAT GOVERN THE RECOVERY OF ENERGY EFFICIENCY COSTS?

A. In PURA § 39.905, the Texas Legislature established policies that an electric utility such as AEP Texas annually will provide, through market-based SOPs or targeted MTPs, incentives sufficient for retail electric providers (REPs) and competitive energy efficiency service providers (EESPs) to acquire additional cost-effective energy efficiency, subject to cost ceilings established by the Commission, for the utility's residential and commercial customers equivalent to:

(A) not less than: (i) 30 percent of the electric utility's annual growth in demand of residential and commercial customers by December 31 of each year beginning with the 2013 calendar year; and (ii) the amount of energy efficiency to be acquired for the utility's residential and commercial customers for the most recent preceding year, and

(B) for an electric utility whose amount of energy efficiency to be acquired under this subsection is equivalent to at least four-tenths of one percent of the electric utility's summer weather-adjusted peak demand for residential and commercial customers in the previous calendar year, not less than: (i) four-tenths of one percent of the

1 utility's summer weather-adjusted peak demand for residential and
2 commercial customers by December 31 of each subsequent year;
3 and (ii) the amount of energy efficiency to be acquired for the
4 utility's residential and commercial customers for the most recent
5 preceding year.²

6 The Legislature has also recognized that a utility should have access to a
7 mechanism to enable it to fully and timely recover the costs of providing these energy
8 efficiency programs.³ Additionally, PURA directed the Commission to adopt rules that
9 establish an incentive and reward utilities that exceed their minimum goals.

10 **B. Commission Rule Pertaining to an EECRF Filing**

11 **Q. PLEASE DESCRIBE THE MINIMUM ANNUAL ENERGY EFFICIENCY GOALS**
12 **REQUIRED UNDER THE COMMISSION'S RULE?**

13 **A. Consistent with PURA § 39.905, 16 TAC § 25.181(e)(1) requires a utility to administer**
14 **a portfolio of energy efficiency programs to acquire, at a minimum, the following:**

15 (A) Beginning with the 2013 program year, until the trigger described
16 in subparagraph (B) is reached, a 30% reduction of its annual
17 growth in demand of residential and commercial customers.

18 (B) If the demand reduction goal to be acquired by a utility under
19 subparagraph (A) is equivalent to at least four-tenths of 1% of its
20 summer weather-adjusted peak demand for the combined
21 residential and commercial customers for the previous program
22 year, the utility must meet the energy efficiency goal described in
23 subparagraph (C) for each subsequent program year.

24 (C) Once the trigger described in subparagraph (B) is reached, the
25 utility must acquire four-tenths of 1% of its summer weather-
26 adjusted peak demand for the combined residential and commercial
27 customers for the previous program year.

28 (D) Except as adjusted in accordance with subsection (u) of the rule, a
29 utility's demand reduction goal in any year shall not be lower than

² PURA § 39.905(a)(3)

³ PURA § 39.905(b)(1)

1 its goal for the prior year, unless the Commission establishes a goal
2 for a utility pursuant to paragraph (2) of 16 TAC § 25.181(e).

3 Q. HOW HAS AEP TEXAS ESTABLISHED ITS GOAL FOR PY 2024?

4 A. AEP Texas has calculated its goal in accordance with 16 TAC § 25.181(e)(1)(C).

5 Q. WHY IS AEP TEXAS FILING THIS REQUEST TO ADJUST ITS EECRF FOR
6 RECOVERY OF ITS PROJECTED PY 2024 ENERGY EFFICIENCY
7 EXPENDITURES?

8 A. 16 TAC § 25.182(d)(8) requires a utility in an area in which customer choice is offered
9 to apply to adjust its EECRF no later than June 1st of each year, with the adjusted
10 EECRF to be effective March 1st of the following year, to reflect changes in program
11 costs and performance bonus and to minimize any over- or under-recovery in prior year
12 program costs.

13 Q. WHAT ARE THE REQUIRED ELEMENTS TO BE COVERED WITHIN THE
14 SCOPE OF THIS PROCEEDING?

15 A. As outlined in the Commission rule for energy efficiency, an EECRF rate schedule
16 must be included in the utility's tariff to permit the utility to timely recover the
17 reasonable costs of providing energy efficiency programs, including prior years' over-
18 or under-recovery of energy efficiency program costs, any applicable performance
19 bonus (16 TAC § 25.182(e)), projected EM&V costs, and EECRF proceeding expenses
20 incurred by AEP Texas and municipalities (16 TAC § 25.182(d)(3)). The EECRF is to
21 be calculated to recover the costs associated with the programs from EECRF classes
22 that receive services under the programs AEP Texas offers (16 TAC § 25.182(d)(2)).
23 The Commission may approve an energy charge for the EECRF. The EECRF must be

1 set at a rate that will give AEP Texas the opportunity to earn revenues equal to the sum
2 of AEP Texas' forecasted energy efficiency program costs, net of energy efficiency
3 costs included in base rates, applicable prior years' energy efficiency over- or under-
4 recovery, applicable performance bonus (16 TAC § 25.182(d)(1)), projected EM&V
5 costs, and AEP Texas and municipal EECRF proceeding expenses.

6 According to the Commission rule regarding a proceeding to change an
7 EECRF, a utility must show that the costs to be recovered through the EECRF are
8 reasonable estimates of the costs necessary to provide energy efficiency programs and
9 to meet the utility's goals (16 TAC § 25.182(d)(12)).

10
11 **IV. AEP TEXAS' APPLICATION**

12 **Q. WHAT ARE THE ESSENTIAL ELEMENTS CONTAINED WITHIN AEP TEXAS'**
13 **APPLICATION REQUESTING EECRF RECOVERY OF ITS PROGRAM COSTS?**

14 **A. According to 16 TAC § 25.182(d)(10), a utility's application to change an EECRF must**
15 **include testimony and schedules. AEP Texas' application includes testimony and**
16 **schedules providing the information in compliance with 16 TAC § 25.182(d) for**
17 **approval of an adjusted EECRF that show:**

- 18 (1) the forecasted energy efficiency program costs for PY 2024;
19 (2) the performance bonus based on AEP Texas' PY 2022 energy
20 efficiency achievements;
21 (3) any adjustment for past over- or under-recovery of energy efficiency
22 revenues including interest;
23 (4) information concerning the calculation of billing determinants for
24 2022 and 2024;

- (5) the direct assignment and allocation of energy efficiency costs to eligible rate classes;
- (6) information concerning calculations related to the cost cap requirements;
- (7) incentive payments by program, including a list of each EESP receiving more than 5% of 2022 overall incentive payments and the percentage of 2022 incentives received by those EESPs;
- (8) administrative costs, including any EECRF proceeding expenses for 2022;
- (9) actual EECRF revenues by rate class, for the period of over-recovery of 2022 EECRF costs;
- (10) AEP Texas' bidding and engagement process for contracting with EESPs, including a list of all EESPs that received incentive payments during 2022;
- (11) the estimated useful life for each measure in each program; and
- (12) the actual energy efficiency program costs for PY 2022.

All of these elements in AEP Texas' application for approval of its adjusted EECRF for 2024 are required by virtue of 16 TAC § 25.182(d)(10) and (11).

A. Achievement of Objectives that Exceed the Minimum Goals of the Statute and Rule

Q. WHAT DEMAND REDUCTION AND ENERGY SAVINGS DOES AEP TEXAS PROPOSE TO ACHIEVE THROUGH ITS PY 2024 PROGRAMS?

A. AEP Texas' PY 2024 minimum demand reduction goal is 21.55 MW, as calculated in accordance with 16 TAC § 25.181(e)(1)(C). AEP Texas' PY 2024 energy savings goal is 37,756 MWh, as calculated in accordance with 16 TAC § 25.181(e)(4).

The energy efficiency objectives AEP Texas seeks to achieve through its proposed PY 2024 energy efficiency expenditures include a peak demand reduction of as much as 60.93 MW and energy savings of as much as 76,758 MWh.

1 Q. DO YOU BELIEVE IT IS CONSISTENT WITH THE COMMISSION RULE TO
2 PURSUE THE OBJECTIVES AEP TEXAS HAS ESTABLISHED FOR ITS PY 2024
3 PROGRAM?

4 A. Yes, I believe the intent of the Commission rule is for AEP Texas to achieve as much
5 cost-effective energy efficiency savings as is reasonably possible. This intent is
6 manifested in PURA § 39.905(b)(2), wherein the Legislature authorized the
7 Commission to provide a performance bonus to reward a utility for “administering
8 programs under this section that exceed the minimum goals established by this section.”
9 The express characterization of the goals in PURA § 39.905 as “minimum goals”
10 indicates the Legislature’s desire that utilities be encouraged to exceed these goals
11 where additional cost-effective energy efficiency is reasonably possible.

12 B. Research and Development (R&D) Costs

13 Q. DID AEP TEXAS’ PY 2022 ENERGY EFFICIENCY PROGRAM COSTS INCLUDE
14 R&D EXPENDITURES?

15 A. Yes.

16 Q. HAS AEP TEXAS PROJECTED ITS PY 2024 R&D EXPENDITURES?

17 A. Yes. AEP Texas has projected \$353,646 for R&D expenditures in PY 2024.

18 Q. HAS AEP TEXAS INCLUDED THE MAXIMUM AMOUNT IN PY 2024 FOR
19 ENERGY EFFICIENCY R&D EXPENDITURES ALLOWED BY THE
20 COMMISSION RULE?

21 A. No. 16 TAC § 25.181(g) specifies that the maximum amount of energy efficiency R&D
22 costs that AEP Texas could incur for PY 2024 is 10% of its total program costs for the
23 previous program year. However, AEP Texas has projected the amount it considers to

1 be reasonable for projected R&D expenditures to be \$353,646 considering the whole
2 of its energy efficiency program offerings and the magnitude of its required demand
3 reduction goal to be achieved in PY 2024.

4 C. Over-Recovery of PY 2022 Costs

5 Q. IS THE AMOUNT AEP TEXAS IS SEEKING TO RECOVER FROM CUSTOMERS
6 THROUGH ITS PY 2024 EECRF ADJUSTED TO REFLECT THE OVER-
7 RECOVERY OF ENERGY EFFICIENCY PROGRAM EXPENSES IN PY 2022?

8 A. Yes. In addition to collecting its projected total PY 2024 energy efficiency program
9 expenditures, AEP Texas is requesting to include within its adjusted PY 2024 EECRF
10 the amount of its actual PY 2022 energy efficiency program revenues that were greater
11 than its actual PY 2022 EECRF program costs, including interest.

12 Q. PLEASE EXPLAIN THE BASIS FOR AEP TEXAS' INCLUSION OF THE 2022
13 OVER-RECOVERY AMOUNT WITHIN ITS ADJUSTED 2024 EECRF.

14 A. PURA § 39.905(b-1) provides that:

15 The energy efficiency cost recovery factor under Subsection (b)(1) may not
16 result in an over-recovery of costs but may be adjusted each year to change
17 rates to enable utilities to match revenues against energy efficiency costs
18 and any incentives to which they are granted. The factor shall be adjusted
19 to reflect any over-collection or under-collection of energy efficiency cost
20 recovery revenues in previous years.

21 16 TAC § 25.182(d)(1)(A) further states that the "EECRF shall be calculated based on
22 the preceding year's over- or under-recovery." The proposed EECRF reflects a refund
23 to customers in the amount of \$227,177 for AEP Texas actual energy efficiency costs
24 for 2022, including interest.

D. 2022 Performance Bonus

Q. HAS AEP TEXAS CALCULATED THE PERFORMANCE BONUS IT SEEKS TO RECOVER IN CONNECTION WITH ITS PY 2022 ENERGY EFFICIENCY ACHIEVEMENTS?

A. Yes. Please refer to Schedule D, which I sponsor. This schedule demonstrates the calculation of the \$6,077,493 performance bonus that AEP Texas seeks to be awarded based upon its PY 2022 energy efficiency results.

AEP Texas achieved a peak demand reduction of 53,404 MW and energy savings of 83,915 MWh from its PY 2022 portfolio of energy efficiency programs. The minimum demand reduction goal to be achieved in 2022 was 20.83 MW, and the calculated energy reduction goal to be achieved in 2022 was 36,494 MWh. AEP Texas exceeded both its PY 2022 demand reduction and energy reduction goals.

These achievements qualify AEP Texas for a performance bonus per the Commission rule. All of the calculations and requirements regarding the \$6,077,493 performance bonus AEP Texas now seeks are as outlined in 16 TAC § 25.182(e).

E. 2022 Energy Efficiency Proceeding Expenses

Q. HAS AEP TEXAS INCLUDED EECRF PROCEEDING EXPENSES IN ITS REQUEST?

A. Yes. According to 16 TAC § 25.182(d)(3), a proceeding to adjust an EECRF is a ratemaking proceeding for purposes of PURA §§ 33.023 and 36.061. In addition, EECRF proceeding expenses are to be included in the adjusted EECRF calculated under 16 TAC § 25.182(d)(1). In accordance with 16 TAC § 25.182(d)(3), AEP Texas includes only EECRF proceeding expenses paid or owed for the immediately previous

1 EECRF proceeding conducted under this subsection for services reimbursable under
2 PURA § 33.023(b). In this proceeding, AEP Texas is requesting recovery of \$48,768
3 of AEP Texas' expenses for Docket No. 53679 and \$6,538 in municipal expenses. The
4 invoices relating to AEP Texas' 2022 EECRF rate-case expenses in Docket No. 53679
5 are included with the affidavit of Leila Melhem attesting to the reasonableness of those
6 costs as EXHIBIT RC-1. The invoices for the municipalities' expenses are included as
7 EXHIBIT RC-2. A description of how these rate-case expenses are incorporated into
8 the 2024 Rider EECRF rates can be found in witness Jackson's testimony.

9 Q. DOES THIS CONCLUDE YOUR DIRECT TESTIMONY?

10 A. Yes, it does.

PUC DOCKET NO. _____

APPLICATION OF AEP TEXAS INC.	§	PUBLIC UTILITY COMMISSION
TO ADJUST ITS ENERGY	§	
EFFICIENCY COST RECOVERY	§	OF TEXAS
FACTOR AND RELATED RELIEF	§	

AFFIDAVIT OF LEILA M. MELHEM

STATE OF TEXAS §
 §
COUNTY OF TRAVIS §

BEFORE ME, the undersigned authority, on this day personally appeared Leila M. Melhem, who being by me first duly sworn, on oath, deposed and said the following:

My name is Leila M. Melhem. I am over the age of twenty-one years, am of sound mind, have personal knowledge of the statements made herein, and the facts are true and correct. I am competent to make this Affidavit.

1. I am employed by American Electric Power Service Corporation (AEPSC) as Senior Counsel in the Legal Department. I have practiced law since 2012, including many cases before the Public Utility Commission of Texas (Commission).
2. AEPSC is responsible for providing legal services to all American Electric Power Company, Inc. (AEP) business units. In my role, I have represented American Electric Power Company, Inc.'s (AEP) subsidiary operating companies, including AEP Texas Inc. (AEP Texas), as well as other investor-owned utilities in Texas, on multiple matters. Such matters include several past energy efficiency cost recovery factor (EECRF) proceedings, base-rate cases, fuel-reconciliation proceedings, sale/transfer/merger dockets, and various tariff-related matters.
3. As Senior Counsel, I am responsible for reviewing and approving invoices from outside law firms and consultants. I am familiar with the rates of a broad range of lawyers, both those at small and large firms and solo practitioners, including the rates charged by such attorneys for work on matters before the Commission.
4. In the 2022 *Application of AEP Texas Inc. to Adjust Its Energy Efficiency Cost Recovery Factor and Related Relief*, Docket No. 53679, AEP Texas was represented by outside counsel with the law firm of Duggins Wren Mann & Romero, LLP (DWMR). The DWMR

attorneys who worked on this matter have extensive experience representing utilities before the Commission, including EECRF proceedings.

5. Patrick Pearsall was the primary attorney at DWMR representing AEP Texas in Docket No. 53679. Mr. Pearsall has been a licensed Texas attorney since 2004, representing utility clients before the Commission and Texas courts for the majority of that time, and one of AEP Texas' outside counsel in various proceedings. Moreover, AEP Texas is not the only client he represents before the Commission. Mr. Pearsall is therefore knowledgeable of and skilled in Commission practices and procedures. AEP Texas was also represented by an associate attorney at DWMR, Stephanie Green. Ms. Green has been a licensed attorney since 2016 and has represented utility clients before the Commission and Texas courts, including EECRF proceedings, for the last several years. Ms. Green assisted Mr. Pearsall representing AEP Texas in a cost-effective manner.
6. The invoices to AEP Texas from DWMR for work in Docket No. 53679, which total \$48,767.94 are attached. The billings provide detail of what task was being addressed for the time billed, and therefore, indicate the time billed for any specific issue or issues in last year's proceeding, which would also indicate the amount of rate-case expenses reasonably associated with each issue. I have personally reviewed the invoices on behalf of AEP Texas.
7. I reviewed the above-referenced invoices taking into consideration the eight factors listed in Rule 1.04(b) of the Texas Disciplinary Rules of Professional Conduct:
 - A. the time and labor required, novelty and difficulty of the questions involved, and the skill requisite to perform the legal services properly;
 - B. the likelihood that acceptance of employment will preclude other employment by the attorney;
 - C. the fee customarily charged in the locality for similar legal services;
 - D. the amount of time involved and result achieved;
 - E. time limitation imposed by the client or by the circumstances;
 - F. the nature and length of the professional relationship with the client;
 - G. the experience, reputation, and ability of the lawyers performing the services; and
 - H. whether the fee is fixed or contingent on results or uncertainty of collection before the legal services have been rendered.

8. I considered the factors delineated by the Third Court of Appeals in *City of El Paso v. Public Utility Comm'n of Texas*, 916 S.W.2d 515 (Tex. App.—Austin 1995, writ dismissed by agreement):
 - A. Time and labor required;
 - B. nature and complexity of the case;
 - C. amount of money or value of property or interest at stake;
 - D. extent of responsibilities the attorney assumes;
 - E. whether the attorney loses other employment because of the undertaking; and
 - F. benefits to the client from the services.
9. I also considered the relevant criteria relating to the reasonableness of rate-case expenses in 16 Tex. Admin. Code (TAC) § 25.245(b):
 - A. the nature, extent, and difficulty of the work done by the attorney or other professional in the rate case;
 - B. the time and labor required and expended by the attorney or other professional;
 - C. the fees or other consideration paid to the attorney or other professional for the services rendered;
 - D. the expenses incurred for lodging, meals and beverages, transportation, or other services or materials;
 - E. the nature and scope of the rate case, including:
 1. the size of the utility and number and type of consumers served;
 2. the amount of money or value of property or interest at stake;
 3. the novelty or complexity of the issues addressed;
 4. the amount and complexity of discovery;
 5. the occurrence and length of a hearing; and
 6. the specific issue or issues in the rate case and the amount of rate-case expenses reasonably associated with each issue.
10. As noted above, I am familiar with the rates for utility regulatory work in Texas and elsewhere. The rates charged by an individual lawyer typically vary based on the level of experience possessed by the lawyer performing the work, the size and reputation of the law firm in which the lawyer works, and the technical nature of the work performed. While the hourly rate charged by outside counsel for work in this case is an important factor,

it is only one of many important factors to be considered. Equally important are factors such as the number of hours worked, the complexity of the issues involved, and the experience of the lawyers involved. That is, an experienced lawyer in a complex case with an hourly rate at the high end of the range may be more able to do the work more efficiently than a less experienced lawyer with an hourly rate at the low- or mid-point of the hourly rate range, such that the total amount paid at the end of the day is reasonable, even if the hourly rates are at the high end of the range. Similarly, a lawyer working at an hourly rate at the low- or mid-point range may have spent so many hours on a matter that the total amount paid is not reasonable, even though the rate is low.

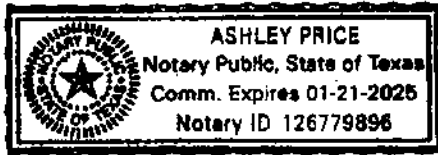
11. I am familiar with many regulatory lawyers in the Texas bar, and the lawyers at DWMR enjoy excellent reputations for providing a high level of quality work on both complex and routine matters. DWMR works on matters of significant importance to its utility clients. In my experience, the hourly rates of DWMR for work done in Docket No. 53679 are consistent with other Texas lawyers performing similar work in Texas. Rates for lawyers at the Commission, in my experience, have recently ranged, depending on the experience of the lawyer between \$230 to more than \$700 (and sometimes more for very specialized subject matters, like regulatory tax work). The rates for DWMR work in Docket No. 53679 are in the expected range.
12. The rates charged by DWMR for Docket No. 53679 were the same hourly rates the law firm charged for AEP Texas and its affiliates for other matters of which I am familiar, including matters for which rate-case expense reimbursement was not available.
13. In my opinion, the hourly rates charged by DWMR in Docket No. 53679 are reasonable and in the range of rates charged in Texas by firms with the same level of depth and expertise. Similarly, in my opinion, the other expenses charged by DWMR (i.e., copying, delivery service, etc.) are also reasonable and in line with costs charged by other law firms providing these types of legal services.
14. With respect to 16 TAC § 25.245(b) and (c) that relate to the determination of the reasonableness and necessity of the rate case expenses AEP Texas seeks to recover, the following information is relevant:

- A. The rate-case expense documentation AEP Texas is filing shows that the fees paid to, tasks performed by, and time spent on a task by an attorney or other professional in these cases is not extreme or excessive;
 - B. The rate-case expense documentation AEP Texas is filing shows that the expenses incurred for any lodging, meals and beverages, transportation, or other services or materials were not extreme or excessive;
 - C. AEP Texas' application, testimony, and related material in Docket No. 53679 as well as the rate-case expense documentation AEP Texas is filing show there was no unnecessary duplication of services or testimony;
 - D. AEP Texas' application, testimony, and related materials show that AEP Texas' EECRF application has a reasonable basis in law, policy, and fact, and is warranted based on Commission precedent in prior EECRF cases;
 - E. AEP Texas' rate-case expenses in Docket No. 53679 as a whole are not disproportionate, excessive, or unwarranted in relation to the nature and scope of the case addressed by the evidence pursuant to 16 TAC § 25.245(b) for the reasons noted above; and
 - F. Given the rate-case expense documentation AEP Texas is filing, AEP Texas did not fail to comply with the requirement for providing sufficient information pursuant to 16 TAC § 25.245(b).
15. Based on my experience and after considering the factors listed in paragraphs 8, 9, and 10 above, the \$48,767.94 in rate-case expenses incurred by AEP Texas in Docket No. 53679 were reasonable and necessary for the work performed.

**[Signature page follows.
The remainder of this page is intentionally left blank.]**

Leila M. Melhem
Leila M. Melhem

SUBSCRIBED AND SWORN TO BEFORE ME on this 18th day of May 2023.



Ashley Price
Notary Public State of Texas
My Commission Expires: 1-21-2025

Header Information

Invoice Number: 37527

Vendor: Duggins Wren Mann & Romero, LLP

Address: 600 Congress Ave Suite 1900, Austin, TX. 78701, United States of America

Tax ID: 27-5110427

Invoice Date: 03/11/2022

Received Date: 03/11/2022

Project: AEP062032-AEP Texas 2022 EECRF - PUCT Docket No. 53679

Posting Status: Posted

Billing Start Date: 02/07/2022

Billing End Date: 02/28/2022

Submitted Total: \$209.00

Submitted Currency: USD

Tax Rate: 0.00%

PS Voucher: 02592743

Approved Total: \$209.00

Invoice Summary

Type	Rate x Units	Discount	AEP Disc	Adjustment	AEP Split	Tax	Amount
Fees	209.00	0.00	0.00	0.00	0.00	0.00	209.00
Expenses	0.00	0.00	N/A	0.00	0.00	0.00	0.00
Invoice Total	209.00	0.00	0.00	0.00	0.00	0.00	209.00

Line Items

Item	Date	Type	Category	TK	Rate	Units	AEP Disc	Disc	Adj	AEP Split	Amt
1	02/07/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.30	0.00	0.00	0.00		73.50
Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client J. Frederick et al. re EECRF/EEPR preparation / PUCT/Overall Case Strategy.											
2	02/07/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.30	0.00	0.00	0.00		111.00
Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client G. Hughes, G. Calzada, J. Frederick, L. Melhern, P. Osterloh, and R. Cavazos re case planning and potential issues with filing / PUCT/Overall Case Strategy.											
3	02/21/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	0.00	0.00	0.00		24.50
Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze AEP EEPR and EECRF timeline / PUCT/Overall Case Strategy.											

Completed Requests

Item	Request Name	Requestor	Request Date	Completion Date	Comment	Outcome
1	Post Invoice for 209.00 USD	Duggins Wren Mann & Romero, LLP	03/11/2022	03/21/2022		Approved
Approval History						
	Stop	Performer	Activity	Date/Time	Internal Comment	
	1	Gage, Melissa	Approved	03/20/2022 09:35 PM		

Header Information

Invoice Number: 37660
Vendor: Duggins Wren Mann & Romero, LLP
Address: 600 Congress Ave Suite 1900, Austin, TX, 78701, United States of America
Tax ID: 27-5110427
Invoice Date: 04/13/2022
Received Date: 04/13/2022
Project: AEP062032-AEP Texas 2022 EECRF - PUCT Docket No. 53679
Posting Status: Posted

Billing Start Date: 03/10/2022
Billing End Date: 03/31/2022

Submitted Total: \$160.00
Submitted Currency: USD
Tax Rate: 0.00%
PS Voucher: 02595550
Approved Total: \$160.00

Invoice Summary

Type	Rate x Units	Discount	AEP Disc	Adjustment	AEP Split	Tax	Amount
Fees	160.00	0.00	0.00	0.00	0.00	0.00	160.00
Expenses	0.00	0.00	N/A	0.00	0.00	0.00	0.00
Invoice Total	160.00	0.00	0.00	0.00	0.00	0.00	160.00

Line Items

Item	Date	Type	Category	TK	Rate	Units	AEP Disc	Disc	Adj	AEP Split	Amt
1	03/10/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	0.00	0.00	0.00		24.50
	Activity: A104 Review/analyze Description: Pleadings Review/Analyze milestone schedule re Energy Efficiency Plan and Report (EEPR) /PUCT-Overall Case Strategy										
2	03/21/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.20	0.00	0.00	0.00		74.00
	Activity: A106 Communicate (with client) Description: Pleadings Communicate with client L. Melhem re scope and strategy for EEPR /PUCT-Non-Discovery Pleadings and Motions										
3	03/26/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	0.00	0.00	0.00		24.50
	Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze correspondence re EEPR tables from prior case /PUCT-Overall Case Strategy.										
4	03/29/2022	Fee	L410 Fact Witnesses	Pearsall, Patrick	370.00	0.10	0.00	0.00	0.00		37.00
	Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client L. Melhem re timing and strategy for preparation of direct testimony /PUCT-Overall Case Strategy.										

Completed Requests

Item	Request Name	Requestor	Request Date	Completion Date	Comment	Outcome
1	Post Invoice for 160.00 USD	Duggins Wren Mann & Romero, LLP	04/13/2022	04/13/2022		Auto-Approved
	Approval History					
	Stop	Performer	Activity		Date/Time	Internal Comment
	1	system	Auto-Approved on behalf of Gage, Melissa		04/13/2022 02:12 PM	

Header Information

Invoice Number: 37837

Vendor: Duggins Wren Mann & Romero, LLP

Address: 600 Congress Ave Suite 1900, Austin, TX, 78701, United States of America

Tax ID: 27-5110427

Invoice Date: 05/12/2022

Received Date: 05/12/2022

Project: AEP062032-AEP Texas 2022 EECRF - PUCT Docket No. 53679

Posting Status: Posted

Billing Start Date: 04/04/2022

Billing End Date: 04/30/2022

Submitted Total: \$1182.50

Submitted Currency: USD

Tax Rate: 0.00%

PS Voucher: 00337463

Approved Total: \$1182.50

Invoice Summary

Type	Rate x Units	Discount	AEP Disc	Adjustment	AEP Split	Tax	Amount
Fees	1182.50	0.00	0.00	0.00	0.00	0.00	1182.50
Expenses	0.00	0.00	N/A	0.00	0.00	0.00	0.00
Invoice Total	1182.50	0.00	0.00	0.00	0.00	0.00	1182.50

Line Items

Item	Date	Type	Category	TK	Rate	Units	AEP Disc	Disc	Adj	AEP Split	Amt
1	04/04/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.20	0.00	0.00	0.00		49.00
Activity: A104 Review/analyze Description: Pleadings Review/Analyze filed EECRF /PUCT-Overall Case Strategy											
2	04/04/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	0.00	0.00	0.00		24.50
Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze timing and case preparation issues /PUCT-Overall Case Strategy.											
3	04/05/2022	Fee	L110 Fact Investigation/Development	Jones, Jackie	155.00	0.30	0.00	0.00	0.00		46.50
Activity: A102 Research Description: Fact Investigation/Development Research Commission precedent re issues in recent EECRF dockets /PUCT-Overall Case Strategy.											
4	04/06/2022	Fee	L110 Fact Investigation/Development	Jones, Jackie	155.00	1.80	0.00	0.00	0.00		279.00
Activity: A104 Review/analyze Description: Fact Investigation/Development Review/Analyze and obtain pleadings re 2019-2021 non-ERCOT EECRF docket filings /PUCT-Overall Case Strategy.											
5	04/07/2022	Fee	L110 Fact Investigation/Development	Jones, Jackie	155.00	1.00	0.00	0.00	0.00		155.00
Activity: A104 Review/analyze Description: Fact Investigation/Development Review/Analyze issues re recent EECRF docket filings /PUCT-Overall Case Strategy											
6	04/08/2022	Fee	L140 Document/File Management	Jones, Jackie	155.00	1.20	0.00	0.00	0.00		186.00
Activity: A110 Manage data/files Description: Document/File Management Manage Data/Files re 2019-2021 EECRF docket filings /PUCT-File and Document Management											
7	04/12/2022	Fee	L140 Document/File Management	Jones, Jackie	155.00	0.80	0.00	0.00	0.00		124.00
Activity: A110 Manage data/files Description: Document/File Management Manage Data/Files re research concerning 2019-2021 EECRF docket filings /PUCT-File and Document Management											
8	04/24/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.10	0.00	0.00	0.00		24.50
Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze correspondence from J. Jackson re first draft of testimony /PUCT-Overall Case Strategy.											
9	04/29/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	1.20	0.00	0.00	0.00		294.00
Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze testimony drafts, G. Calzada edits and list of revisions, and identify issues for discussion on call /PUCT-Overall Case Strategy.											

Completed Requests

Item	Request Name	Requestor	Request Date	Completion Date	Comment	Outcome
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	Approval History				
	Stop	Performer	Activity	Date/Time	Internal Comment
	1	Gage, Melissa	Approved	05/23/2022 06:34 PM	

Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
7	05/10/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0 10	1 22	0.00	0 00		23.28
	Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client P Osterloh re testimony draft questions /PUCT-Overall Case Strategy.										
	Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
8	05/12/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0 10	1.22	0.00	0 00		23.28
	Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client P Osterloh re testimony development question /PUCT-Overall Case Strategy										
	Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
9	05/12/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0 20	2.45	0.00	0 00		46.55
	Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze correspondence from P Osterloh re testimony and attachments /PUCT-Overall Case Strategy										
	Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
10	05/12/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0 20	2.45	0.00	0 00		46 55
	Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze J Jackson correspondence re testimony draft /PUCT-Overall Case Strategy.										
	Adjustment: 06/14/2022 - Amount adjusted by 2 45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
11	05/16/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0 20	2.45	0.00	0 00		46.55
	Activity: A101 Plan and prepare for Description: Analysis/Strategy Plan and prepare for client call with R. Cavazos and P. Osterloh /PUCT-Overall Case Strategy.										
	Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
12	05/16/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0 30	3.68	0.00	0 00		69.82
	Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client P. Osterloh and R. Cavazos re testimony /PUCT-Overall Case Strategy.										
	Adjustment: 06/14/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
13	05/16/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0 20	2.45	0.00	0 00		46.55
	Activity: A104 Review/analyze Description: Pleadings Review/Analyze changes to P. Osterloh draft testimony /PUCT-Overall Case Strategy.										
	Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
14	05/16/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0 20	2.45	0.00	0 00		46.55
	Activity: A104 Review/analyze Description: Pleadings Review/Analyze changes to J. Jackson draft testimony /PUCT-Overall Case Strategy.										
	Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
15	05/17/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	1 10	13.48	0.00	0 00		256.02
	Activity: A103 Draft/revise Description: Pleadings Draft/Revise application for filing /PUCT-Non-Discovery Pleadings and Motions.										
	Adjustment: 06/14/2022 - Amount adjusted by 13 48 - system, system										

16	05/17/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.40	4.90	0.00	0.00	93.10
Activity: A101 Plan and prepare for Description: Pleadings Plan and prepare rate-case expense (RCE) affidavit /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
17	05/17/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze and identify issues for resolution /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
18	05/19/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client R. Cavazos re draft testimony /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
19	05/19/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client P. Osterloh re review call and schedule status /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
20	05/19/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze schedules and testimony status /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
21	05/19/2022	Fee	L410 Fact Witnesses	Pearsall, Patrick	370.00	0.80	14.80	0.00	0.00	281.20
Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze direct testimony of J. Jackson and P. Osterloh /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 14.80 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
22	05/19/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.50	9.25	0.00	0.00	175.75
Activity: A103 Draft/revise Description: Pleadings Draft/Revise application /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 06/14/2022 - Amount adjusted by 9.25 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
23	05/20/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze and identify issues for review call and outstanding matters /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
24	05/20/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
Activity: A104 Review/analyze Description: Pleadings Review/Analyze revisions to pleading draft re procedural schedule and Motion to Cancel /PUCT-Non-Discovery Pleadings and Motions Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										

			Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze revisions to J. Jackson testimony /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/20/2022	Fee	L410 Fact Witnesses	Pearsall, Patrick	370.00	2.40	44.40	0.00	0.00	843.60
26			Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze issues re scope of and strategy for J. Jackson direct testimony /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 44.40 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/20/2022	Fee	L410 Fact Witnesses	Pearsall, Patrick	370.00	0.40	7.40	0.00	0.00	140.60
27			Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client AEP Texas witnesses and litigation team re filing issues and testimony development /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 7.40 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/20/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.80	14.80	0.00	0.00	281.20
28			Activity: A104 Review/analyze Description: Pleadings Review/Analyze issues re draft application and rate-case expenses /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 14.80 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/22/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	2.10	25.72	0.00	0.00	488.78
29			Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze notes and comments re testimony drafts /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 25.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/22/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
30			Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze revised versions of testimony /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/22/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.30	3.68	0.00	0.00	69.82
31			Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze revisions to testimony /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/22/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
32			Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client team re revised testimony drafts /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/22/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
33			Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze issues re follow up for finalizing application and filing package /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/22/2022	Fee	L410 Fact Witnesses	Pearsall, Patrick	370.00	2.20	58.20	0.00	0.00	412.20

			Description: Fact Witnesses Review/Analyze issues re draft direct testimony of R. Cavazos, P. Osterloh, and J. Jackson /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 59.20 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
35	05/23/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.30	3.68	0.00	0.00	69.82
			Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client P. Osterloh re updated calculation for schedules and supporting information /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
36	05/23/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
			Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client R. Cavazos re updated testimony /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
37	05/23/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
			Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client J. Jackson re status of testimony and schedules /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
38	05/23/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
			Activity: A106 Communicate (with client) Description: Pleadings Communicate with client G. Calzada re application draft /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
39	05/23/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
			Activity: A103 Draft/revise Description: Pleadings Draft/Revise affidavit and update application filing /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
40	05/23/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
			Activity: A106 Communicate (with client) Description: Pleadings Communicate with client L. Melhem re RCE affidavit draft /PUCT-Rate Case Expenses. Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
41	05/23/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
			Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze correspondence from P. Osterloh re update regarding schedule data /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
42	05/23/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00	105.45
			Activity: A104 Review/analyze Description: Pleadings Review/Analyze issues re scope of application /PUCT-Non-Discovery Pleadings and Motions Adjustment: 06/14/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement							
	05/23/2022	Fee	L410 Fact Witnesses	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00	70.30

			Strategy.								
			Adjustment: 06/14/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
	05/24/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
44			Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client L. Melhem re final review call and status of updates /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
	05/24/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
45			Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client P. Osterloh re pending matters for testimony /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
	05/24/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.60	7.35	0.00	0.00		139.65
46			Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client team re application, testimony and schedules and follow up related to information to be updated /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 7.35 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
	05/24/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.90	11.02	0.00	0.00		209.48
47			Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze P. Osterloh testimony to verify schedule data /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 11.02 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
	05/24/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.80	9.80	0.00	0.00		186.20
48			Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze J. Jackson testimony and verify schedule and exhibit data /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 9.80 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
	05/24/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.60	7.35	0.00	0.00		139.65
49			Activity: A104 Review/analyze Description: Fact Witnesses Review/Analyze R. Cavazos testimony and verify schedule and exhibit data /PUCT-Overall Case Strategy Adjustment: 06/14/2022 - Amount adjusted by 7.35 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
	05/24/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.50	6.12	0.00	0.00		116.38
50			Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze supporting data for RCE /PUCT-Rate Case Expenses. Adjustment: 06/14/2022 - Amount adjusted by 6.12 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
	05/24/2022	Fee	L410 Fact Witnesses	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
51			Activity: A106 Communicate (with client) Description: Fact Witnesses Communicate with client P. Osterloh re exhibits and workpapers for filing /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
--	05/24/2022	Fee	L410 Fact Witnesses	Pearsall, Patrick	370.00	0.70	12.95	0.00	0.00		246.05

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[illegible]

[illegible]

		Analysis/Strategy	Patrick						
Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze issues re finalizing package of application, testimony, and supporting schedules /PUCT-Overall Case Strategy. Adjustment: 06/14/2022 - Amount adjusted by 33.30 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									

Completed Requests

Item	Request Name	Requestor	Request Date	Completion Date	Comment	Outcome
1	Post Invoice for 13,445.90 USD	Duggins Wren Mann & Romero, LLP	06/14/2022	06/16/2022		Approved
	Approval History					
	Stop	Performer	Activity	Date/Time	Internal Comment	
	1	Gage, Melissa	Approved	06/15/2022 09:30 PM		

7	06/03/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze order of referral and preliminary order GPRELIM/PUCT-Issue List, Preliminary Order. Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
8	06/03/2022	Fee	L250 Other Written Motions/Submissions	Pearsall, Patrick	370.00	0.10	1.85	0.00	0.00		35.15
Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze Order of Referral and Preliminary Order /PUCT-Overall Case Strategy Adjustment: 07/15/2022 - Amount adjusted by 1.85 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
9	06/06/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
Activity: A104 Review/analyze Description: Pleadings Review/Analyze TEAM motion to intervene /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
10	06/06/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.10	1.85	0.00	0.00		35.15
Activity: A104 Review/analyze Description: Pleadings Review/Analyze TEAM's motion to intervene /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 1.85 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
11	06/07/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
Activity: A106 Communicate (with client) Description: Pleadings Communicate with client P. Osterloh re notice /PUCT-Notice Issues. Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
12	06/08/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
Activity: A106 Communicate (with client) Description: Pleadings Communicate with client L. Melhem et al. re Proof of Notice filing /PUCT-Notice Issues. Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
13	06/08/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00		105.45
Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze issues re provision and proof of notice /PUCT-Notice Issues. Adjustment: 07/15/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
14	06/08/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client L. Melhem and G. Calzada re proof of notice /PUCT-Notice Issues. Adjustment: 07/15/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
15	06/08/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.10	1.85	0.00	0.00		35.15
Activity: A104 Review/analyze Description: Pleadings Review/Analyze Cities' motion to intervene /PUCT-Non-Discovery Pleadings and Motions Adjustment: 07/15/2022 - Amount adjusted by 1.85 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											

			Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze correspondence from Cities re status of case and procedural schedule /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
17	06/10/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.10	1.85	0.00	0.00		35.15
			Activity: A108 Communicate (other external) Description: Analysis/Strategy Communicate with other external Cities' counsel R. Dubberstein re case status /PUCT-Overall Case Strategy Adjustment: 07/15/2022 - Amount adjusted by 1.85 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
18	06/13/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
			Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze status of procedural schedule in case /PUCT-Overall Case Strategy Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
19	06/15/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
			Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client P. Osterloh re potential issue in filing /PUCT-Overall Case Strategy Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
20	06/15/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
			Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client L. Melhem re call to discuss issue in filing /PUCT-Overall Case Strategy Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
21	06/15/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.10	1.85	0.00	0.00		35.15
			Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client L. Melhem re potential errata to testimony and supporting schedules /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 1.85 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
22	06/16/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.40	4.90	0.00	0.00		93.10
			Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client R. Cavazos et al re filing issue and possible errata /PUCT-Non-Discovery Pleadings and Motions Adjustment: 07/15/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
23	06/16/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
			Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client R. Cavazos et al re errata preparation /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
24	06/16/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
			Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client L. Melhem re errata filing, preparation and timing /PUCT-Overall Case Strategy.								

Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
25	06/16/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55	
	Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze SOAH Order No. 1 /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
	26	06/16/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
		Activity: A103 Draft/revise Description: Pleadings Draft/Revise pleading for errata /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
27		06/16/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
		Activity: A104 Review/analyze Description: Written Discovery Review/Analyze discovery, assignments and timeline for responding to same /PUCT-Discovery Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	28	06/16/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.50	9.25	0.00	0.00	175.75
		Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client R. Cavazos, P. Osterloh, and J. Jackson re updated over-under recovery calculation and potential errata to testimony and schedules /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 9.25 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
29		06/16/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00	70.30
		Activity: A104 Review/analyze Description: Written Discovery Review/Analyze Cities' 1st RFIs /PUCT-Discovery. Adjustment: 07/15/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	30	06/16/2022	Fee	L110 Fact Investigation/Development	Jones, Jackie	155.00	0.40	3.10	0.00	0.00	58.90
		Activity: A102 Research Description: Fact Investigation/Development Research re errata filing issues /PUCT-Overall Case Strategy Adjustment: 07/15/2022 - Amount adjusted by 3.10 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
31		06/17/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00	70.30
		Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze Staff recommendation on sufficiency of notice and application /PUCT-Overall Case Strategy Adjustment: 07/15/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	32	06/17/2022	Fee	L310 Written Discovery	Jones, Jackie	155.00	0.10	0.78	0.00	0.00	14.72
		Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client G. Gullickson re service of Cities 1st /PUCT-Discovery. Adjustment: 07/15/2022 - Amount adjusted by 0.78 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
33		06/17/2022	Fee	L310 Written Discovery	Jones, Jackie	155.00	0.20	1.55	0.00	0.00	29.45
		Activity: A104 Review/analyze Description: Written Discovery Review/Analyze Cities 1st and update procedural calendar re same /PUCT-Discovery Adjustment: 07/15/2022 - Amount adjusted by 1.55 - system, system Reason for Adjustment: Discount Agreement									

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			Activity: A103 Draft/revise Description: Other Written Motions and Submissions Draft/Revise procedural schedule and motion to cancel prehearing conference (PHC) for consideration /PUCT-Non-Discovery Pleadings and Motions Adjustment: 07/15/2022 - Amount adjusted by 14.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
44	06/22/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
			Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze issues re strategy for procedural schedule proposal /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
45	06/22/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00		105.45
			Activity: A103 Draft/revise Description: Pleadings Draft/Revise pleading presenting errata to testimony and supporting schedules /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
46	06/22/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.80	14.80	0.00	0.00		281.20
			Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client L. Melhem re errata pleading and procedural schedule /PUCT-Overall Case Strategy Adjustment: 07/15/2022 - Amount adjusted by 14.80 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
47	06/22/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
			Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze comments and revisions re procedural schedule /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
48	06/22/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.60	7.35	0.00	0.00		139.65
			Activity: A103 Draft/revise Description: Other Written Motions and Submissions Draft/Revise procedural schedule and motion to lengthen schedule in light of errata /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 7.35 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
49	06/22/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.60	7.35	0.00	0.00		139.65
			Activity: A106 Communicate (with client) Description: Pleadings Communicate with client L. Melhem re errata filing and questions re same /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 7.35 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
50	06/22/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
			Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze effective date and requirement of compliance filing /PUCT-Overall Case Strategy Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
51	06/22/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
			Activity: A108 Communicate (other external) Description: Other Written Motions and Submissions Communicate with other external Staff and parties re draft proposed procedural schedule /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system								

52	06/23/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
Activity: A104 Review/analyze Description: Pleadings Review/Analyze issues re errata pleading and revisions to testimony /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
53	06/23/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze communication from Cities R. Dubberstein re procedural schedule /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
54	06/24/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
Activity: A104 Review/analyze Description: Pleadings Review/Analyze revisions to errata filing GMOT/PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
55	06/24/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.30	3.68	0.00	0.00		69.82
Activity: A106 Communicate (with client) Description: Pleadings Communicate with client team re errata to schedules and filing /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
56	06/24/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.40	4.90	0.00	0.00		93.10
Activity: A103 Draft/revise Description: Pleadings Draft/Revise errata pleading exhibits and schedules for filing /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
57	06/24/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
Activity: A106 Communicate (with client) Description: Other Written Motions and Submissions Communicate with client L. Melhem re status of procedural schedule discussions and proposals re same /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
58	06/24/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
Activity: A108 Communicate (other external) Description: Other Written Motions and Submissions Communicate with other external TEAM, E. D'Ambrosio, re conflicts and proposals re procedural schedule /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
59	06/24/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
Activity: A108 Communicate (other external) Description: Other Written Motions and Submissions Communicate with other external Cities R. Dubberstein re conflicts and proposals re procedural schedule /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
60	06/24/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.30	3.68	0.00	0.00		69.82
Activity: A108 Communicate (other external) Description: Other Written Motions and Submissions Communicate with other external Staff J. Harrison re conflicts and proposals re procedural schedules /PUCT-Non-Discovery Pleadings and Motions											

Reason for Adjustment: Discount Agreement											
Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
61	06/24/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A108 Communicate (other external) Description: Other Written Motions and Submissions Communicate with other external Staff and parties re procedural schedule proposals and attempt to find agreeable dates for HOM /PUCT-Non-Discovery Pleadings and Motions Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
	06/24/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
	Activity: A106 Communicate (with client) Description: Other Written Motions and Submissions Communicate with client team re schedules and errata filing and confirmation re presentation of same /PUCT-Non-Discovery Pleadings and Motions Adjustment: 07/15/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
63	06/24/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A106 Communicate (with client) Description: Pleadings Communicate with client J. Jackson re procedural schedule and changes to same /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
	06/24/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A104 Review/analyze Description: Pleadings Review/Analyze ARM motion to intervene /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
65	06/24/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00		105.45
	Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze issues re procedural schedule /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
	06/24/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.80	14.80	0.00	0.00		281.20
	Activity: A104 Review/analyze Description: Pleadings Review/Analyze issues re errata pleading /PUCT-Non-Discovery Pleadings and Motions Adjustment: 07/15/2022 - Amount adjusted by 14.80 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
67	06/24/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.50	9.25	0.00	0.00		175.75
	Activity: A106 Communicate (with client) Description: Pleadings Communicate with client L. Melhem and litigation team re procedural schedule and errata pleading /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 07/15/2022 - Amount adjusted by 9.25 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
	06/24/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.50	9.25	0.00	0.00		175.75
	Activity: A108 Communicate (other external) Description: Analysis/Strategy Communicate with other external Staff and Intervenor counsel re procedural schedule and prehearing conference /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 9.25 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
69	06/24/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.10	1.85	0.00	0.00		35.15
	Activity: A104 Review/analyze										

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			Activity: A109 Appear for/attend Description: Court Mandated Conferences Appear for/attend prehearing conference /PUCT-Pre-Hearing Conferences Adjustment: 07/15/2022 - Amount adjusted by 14.80 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	06/27/2022	Fee	L230 Court Mandated Conferences	Pearsall, Patrick	370.00	0.60	11.10	0.00	0.00			210.90
79			Activity: A108 Communicate (other external) Description: Court Mandated Conferences Communicate with other external ALJ and Staff and Intervenor counsel re prehearing conference /PUCT-Pre-Hearing Conferences. . Adjustment: 07/15/2022 - Amount adjusted by 11.10 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	06/27/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.40	7.40	0.00	0.00			140.60
80			Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze issues re procedural schedule /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 7.40 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	06/27/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00			105.45
81			Activity: A108 Communicate (other external) Description: Analysis/Strategy Communicate with other external Staff and Intervenor counsel re procedural schedule /PUCT-Overall Case Strategy. Adjustment: 07/15/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	06/27/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00			105.45
82			Activity: A104 Review/analyze Description: Written Discovery Review/Analyze response to Cities' 1st RFI /PUCT-Discovery. Adjustment: 07/15/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	06/27/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.10	1.85	0.00	0.00			35.15
83			Activity: A104 Review/analyze Description: Written Discovery Review/Analyze Staff's 1st RFIs /PUCT-Discovery Adjustment: 07/15/2022 - Amount adjusted by 1.85 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	06/27/2022	Fee	L210 Pleadings	Jones, Jackie	155.00	0.10	0.78	0.00	0.00			14.72
84			Activity: A104 Review/analyze Description: Pleadings Review/Analyze proposed procedural schedule /PUCT-Overall Case Administration Adjustment: 07/15/2022 - Amount adjusted by 0.78 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	06/28/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.30	3.68	0.00	0.00			69.82
85			Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client team re Cities 1st RFI /PUCT-Discovery. Adjustment: 07/15/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
	06/28/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.30	3.68	0.00	0.00			69.82
86			Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P Osterloh re follow up questions related to Cities 1st RFI /PUCT-Discovery. Adjustment: 07/15/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
--	06/28/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	2.45	0.00	0.00			46.55

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Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
106	06/30/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00		105.45
	Activity: A104 Review/analyze										
	Description: Analysis/Strategy Review/Analyze issues re potential errata concerning bonus calculator /PUCT-Overall Case Strategy.										
	Adjustment: 07/15/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
107	06/30/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.80	14.80	0.00	0.00		281.20
	Activity: A106 Communicate (with client)										
	Description: Written Discovery Communicate with client L. Melhem re responses to Cities 1st RFI and potential errata /PUCT-Discovery										
	Adjustment: 07/15/2022 - Amount adjusted by 14.80 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										

Completed Requests

Item	Request Name	Requestor	Request Date	Completion Date	Comment	Outcome
1	Post Invoice for 9,100.11 USD	Duggins Wren Mann & Romero, LLP	07/15/2022	07/21/2022		Approved
	Approval History					
	Stop	Performer	Activity	Date/Time	Internal Comment	
	1	Melhem, Leila	Approved	07/21/2022 09:52 AM		

7	07/01/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
Activity: A104 Review/analyze Description: Written Discovery Review/Analyze Staff's 2nd RFI and note potential issues /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
8	07/05/2022	Fee	L310 Written Discovery	Jones, Jackie	155.00	0.20	1.55	0.00	0.00		29.45
Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client G. Gullickson and G. Calzada re TEAMS 1st RFI issues /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 1.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
9	07/05/2022	Fee	L310 Written Discovery	Jones, Jackie	155.00	0.20	1.55	0.00	0.00		29.45
Activity: A104 Review/analyze Description: Written Discovery Review/Analyze TEAM's 1st and update procedural calendar re same /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 1.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
10	07/05/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.40	7.40	0.00	0.00		140.60
Activity: A103 Draft/revise Description: Written Discovery Draft/Revise responses to Cities 1st RFI /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 7.40 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
11	07/05/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.10	1.85	0.00	0.00		35.15
Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P. Osterloh re revised response to Cities 1-1 and supporting exhibits /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 1.85 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
12	07/05/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
Activity: A104 Review/analyze Description: Written Discovery Review/Analyze issue re deadlines for responding to Staff 2nd and TEAM 1st RFIs /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
13	07/05/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.40	4.90	0.00	0.00		93.10
Activity: A103 Draft/revise Description: Written Discovery Draft/Revise draft response to Cities 1st RFI /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
14	07/05/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.50	6.12	0.00	0.00		116.38
Activity: A104 Review/analyze Description: Written Discovery Review/Analyze exhibits and attachments to Cities 1st and edits to same /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 6.12 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
15	07/05/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client regarding revised Schedule and attachments for review /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
	07/05/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	1.40	20.25	0.00	0.00		226.05

	Description: Written Discovery Review/Analyze responses to Cities 1st RFI /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 20.35 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
17	07/06/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.50	9.25	0.00	0.00	175.75
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P. Osterloh and L. Melhem re finalizing and filing responses to Cities 1st RFI /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 9.25 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
18	07/06/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.30	3.68	0.00	0.00	69.82
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze responses to Cities' 1st set of RFIs for filing /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
19	07/06/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.30	3.68	0.00	0.00	69.82
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client L. Melhem re review of responses to Cities' 1st RFIs /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
20	07/06/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P. Osterloh re information regarding response and additional edits to Cities' 1st set of RFIs /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
21	07/06/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.40	4.90	0.00	0.00	93.10
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze additional final corrections to discovery responses re Cities' 1st set of RFIs /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
22	07/06/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze workpapers supporting Cities' 1st set of RFIs /PUCT-Overall Case Strategy. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
23	07/06/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	2.45	0.00	0.00	46.55
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client re finalization of Cities 1st set of RFI responses /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
24	07/06/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.40	4.90	0.00	0.00	93.10
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze final filing package for responses to Cities 1st /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement									
--	07/07/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00	105.45

	Adjustment: 08/11/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
26	07/07/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client G. Calzada re status of draft responses /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
27	07/08/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.50	9.25	0.00	0.00		175.75
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze issues re draft responses to TEAM and Staff 1st RFIs /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 9.25 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
28	07/08/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	1.40	25.90	0.00	0.00		492.10
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P. Osterloh, R. Cavazos, and L. Melhem re responses to TEAM and Staff 1st RFIs /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 25.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
29	07/08/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
	Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client L. Melhem re TEAM positions in pending EECRF dockets and strategy for response to same /PUCT-Overall Case Strategy. Adjustment: 08/11/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
30	07/08/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.40	4.90	0.00	0.00		93.10
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze and provide edits to draft responses to Staff and TEAM first sets of RFIs /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
31	07/08/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client G. Calzada re Staff 1-1 /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
32	07/08/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze contracts provided in response to Staff's 1st set of RFIs /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
33	07/08/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.70	8.58	0.00	0.00		162.92
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client via discovery review call for responses to Staff's 1st set of RFIs /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 8.58 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
	07/11/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	1.10	20.35	0.00	0.00		386.65

			and Staff 1st RFIs /PUCT-Discovery.								
			Adjustment: 08/11/2022 - Amount adjusted by 20.35 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
35	07/11/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.60	11.10	0.00	0.00		210.90
			Activity: A104 Review/analyze Description: Written Discovery Review/Analyze issues re draft responses to TEAM and Staff 1st RFIs /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 11.10 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
36	07/11/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.70	8.58	0.00	0.00		162.92
			Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client via discovery review call re TEAM's 1st set of RFIs /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 8.58 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
37	07/11/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
			Activity: A104 Review/analyze Description: Written Discovery Review/Analyze Oncor filed responses to RFIs similar to TEAM's RFIs /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
38	07/11/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.30	3.68	0.00	0.00		69.82
			Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P. Osterloh re draft discovery follow up questions /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
39	07/11/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.30	3.68	0.00	0.00		69.82
			Activity: A104 Review/analyze Description: Written Discovery Review/Analyze draft objection language for draft response to TEAM's 1st set of RFIs /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
40	07/12/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.60	11.10	0.00	0.00		210.90
			Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P. Osterloh, J. Jackson, R. Cavazos, and L. Melhem re responses to Staff 2nd /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 11.10 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
41	07/12/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.50	9.25	0.00	0.00		175.75
			Activity: A104 Review/analyze Description: Written Discovery Review/Analyze responses to Staff 2nd and TEAM 1st /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 9.25 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
42	07/12/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.10	1.85	0.00	0.00		35.15
			Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze SOAH Order No. 2 /PUCT-Overall Case Strategy. Adjustment: 08/11/2022 - Amount adjusted by 1.85 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
43	07/12/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.60	7.35	0.00	0.00		139.65
			Activity: A106 Communicate (with client)								

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	Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
71	07/19/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client G. Calzada re edits and updates to responses to Staff's 2nd RFI /PUCT-Discovery Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
72	07/19/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client L. Melhem re approval for filing /PUCT-Discovery. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
73	07/19/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A108 Communicate (other external) Description: Settlement/Non-binding ADR Communicate with other external R. Dubberstein re settlement discussion /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
74	07/19/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
	Activity: A108 Communicate (other external) Description: Settlement/Non-binding ADR Communicate with other external Fact Investigation/Development Communicate with other external E. D'Ambrosio re settlement discussion /PUCT-Overall Case Strategy. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
75	07/19/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A108 Communicate (other external) Description: Settlement/Non-binding ADR Communicate with other external M. Arth re settlement discussion /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
76	07/19/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
	Activity: A108 Communicate (other external) Description: Settlement/Non-binding ADR Communicate with other external J. Harrison re settlement discussions /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
77	07/20/2022	Fee	L160 Settlement/Non-Binding ADR	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
	Activity: A104 Review/analyze Description: Settlement/Non-binding ADR Review/Analyze issues re settlement strategy and TEAM settlement conditions /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
78	07/20/2022	Fee	L160 Settlement/Non-Binding ADR	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
	Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client L. Melhem re settlement strategy /PUCT-Settlement Activities Adjustment: 08/11/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
--	07/20/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.40	7.40	0.00	0.00		140.60

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106	07/25/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze issues re response to Staff's informal request for data supporting internal administrative and research and development ("R&D") costs /PUCT-Overall Case Strategy. Adjustment: 08/11/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
107	07/25/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00		105.45
Activity: A104 Review/analyze Description: Pleadings Review/Analyze issues re scope and strategy for second errata /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 08/11/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
108	07/26/2022	Fee	L210 Pleadings	Jones, Jackie	155.00	0.50	3.88	0.00	0.00		73.62
Activity: A104 Review/analyze Description: Pleadings Review/Analyze Staff's request for hearing and update procedural calendar re same /PUCT-Overall Case Administration Adjustment: 08/11/2022 - Amount adjusted by 3.88 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
109	07/26/2022	Fee	L440 Other Trial Preparation and Support	Jones, Jackie	155.00	0.10	0.78	0.00	0.00		14.72
Activity: A101 Plan and prepare for Description: Other Trial Preparation and Support Plan and prepare for hearing on the merits /PUCT-Hearing Preparation and Support Adjustment: 08/11/2022 - Amount adjusted by 0.78 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
110	07/26/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.40	4.90	0.00	0.00		93.10
Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client P. Osterloh re data in native form requested by Staff /PUCT-Overall Case Strategy. Adjustment: 08/11/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
111	07/26/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze data to be provided to Staff /PUCT-Overall Case Strategy. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
112	07/26/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.80	9.80	0.00	0.00		186.20
Activity: A104 Review/analyze Description: Pleadings Review/Analyze and prepare errata filing for client review /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 08/11/2022 - Amount adjusted by 9.80 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
113	07/26/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
Activity: A106 Communicate (with client) Description: Pleadings Communicate with client L. Melhem et al. re draft errata, testimony, and schedules for review /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement											
114	07/26/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.40	7.40	0.00	0.00		140.60
Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze issues re support for internal administrative and R&D costs /PUCT-Overall Case Strategy.											

Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
115	07/27/2022	Fee	L140 Document/File Management	Jones, Jackie	155.00	0.10	0.78	0.00	0.00	14.72
Activity: A103 Draft/revise Description: Document/File Management Draft/Revise list of persons subject to protective order to include PUC Staff /PUCT-Overall Case Administration. Adjustment: 08/11/2022 - Amount adjusted by 0.78 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
116	07/27/2022	Fee	L210 Pleadings	Jones, Jackie	155.00	0.10	0.78	0.00	0.00	14.72
Activity: A104 Review/analyze Description: Pleadings Review/Analyze PUC Staff signed protective order certifications /PUCT-File and Document Management. Adjustment: 08/11/2022 - Amount adjusted by 0.78 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
117	07/27/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	1.00	12.25	0.00	0.00	232.75
Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client R. Cavazos, L. Melhem et al. re Parties proposals/settlement /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 12.25 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
118	07/27/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.30	3.68	0.00	0.00	69.82
Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client L. Melhem re proposals from parties /PUCT-Settlement Activities Adjustment: 08/11/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
119	07/27/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
Activity: A106 Communicate (with client) Description: Pleadings Communicate with client P. Osterloh re Schedule O update /PUCT-Non-Discovery Pleadings and Motions Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
120	07/27/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.40	4.90	0.00	0.00	93.10
Activity: A106 Communicate (with client) Description: Pleadings Communicate with client P. Osterloh et al re review of errata pleading and schedules /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 08/11/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
121	07/27/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
Activity: A106 Communicate (with client) Description: Pleadings Communicate with client P. Osterloh re revision to errata schedule /PUCT-Non-Discovery Pleadings and Motions Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
122	07/27/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client P. Osterloh re Cities' adjustment proposal /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
123	07/27/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	1.22	0.00	0.00	23.28
Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client J. Harrison re requested information concerning admin and R&D /PUCT-										

	Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
124	07/27/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.30	5.55	0.00	0.00		105.45
	Activity: A104 Review/analyze Description: Pleadings Review/Analyze issues re second errata filing /PUCT-Non-Discovery Pleadings and Motions Adjustment: 08/11/2022 - Amount adjusted by 5.55 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
125	07/27/2022	Fee	L160 Settlement/Non-Binding ADR	Pearsall, Patrick	370.00	0.80	14.80	0.00	0.00		281.20
	Activity: A104 Review/analyze Description: Settlement/Non-binding ADR Review/Analyze issues re Cities and TEAM/ARM settlement proposals and strategy for counters to same /PUCT-Settlement Activities Adjustment: 08/11/2022 - Amount adjusted by 14.80 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
126	07/27/2022	Fee	L160 Settlement/Non-Binding ADR	Pearsall, Patrick	370.00	1.50	27.75	0.00	0.00		527.25
	Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client L. Melhem, R. Cavazos, P. Osterloh, J. Jackson, and litigation team re Cities and TEAM/ARM settlement proposals /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 27.75 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
127	07/27/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
	Activity: A106 Communicate (with client) Description: Pleadings Communicate with client litigation team re second errata /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 08/11/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
128	07/28/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client P. Osterloh re Cities Nalepa workpaper /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
129	07/28/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.10	1.22	0.00	0.00		23.28
	Activity: A104 Review/analyze Description: Settlement/Non-binding ADR Review/Analyze and provide comments related to points concerning to Cities' adjustment /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 1.22 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
130	07/28/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.30	3.68	0.00	0.00		69.82
	Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client L. Melhem et al. re settlement issues /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
131	07/28/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.70	8.58	0.00	0.00		162.92
	Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client R. Cavazos and team re settlement issues /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 8.58 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
...	07/28/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55

			Activities.								
			Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
133	07/28/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
			Activity: A108 Communicate (other external) Description: Settlement/Non-binding ADR Communicate with other external J. Mauldin re settlement negotiation /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
134	07/28/2022	Fee	L160 Settlement/Non-Binding ADR	Pearsall, Patrick	370.00	0.60	11.10	0.00	0.00		210.90
			Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client L. Melhem re strategy for response to Cities' and ARM/TEAM settlement proposals /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 11.10 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
135	07/28/2022	Fee	L160 Settlement/Non-Binding ADR	Pearsall, Patrick	370.00	0.40	7.40	0.00	0.00		140.60
			Activity: A104 Review/analyze Description: Settlement/Non-binding ADR Review/Analyze issues re Cities and TEAM/ARM settlement term proposals /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 7.40 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
136	07/29/2022	Fee	L210 Pleadings	Green, Stephanie	245.00	0.50	6.12	0.00	0.00		116.38
			Activity: A104 Review/analyze Description: Pleadings Review/Analyze errata filing /PUCT-Overall Case Strategy. Adjustment: 08/11/2022 - Amount adjusted by 6.12 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
137	07/29/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.30	3.68	0.00	0.00		69.82
			Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client L. Melhem et al. re settlement proposals and negotiations /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 3.68 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
138	07/29/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.20	2.45	0.00	0.00		46.55
			Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client J. Mauldin re negotiations with Cities /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 2.45 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
139	07/29/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.40	4.90	0.00	0.00		93.10
			Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client L. Melhem et al. re counter-offer from Cities /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 4.90 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement								
140	07/29/2022	Fee	L160 Settlement/Non-Binding ADR	Pearsall, Patrick	370.00	0.20	3.70	0.00	0.00		70.30
			Activity: A108 Communicate (other external) Description: Settlement/Non-binding ADR Communicate with other external TEAM counsel E. D'Ambrosio re settlement proposals /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 3.70 - system, system Reason for Adjustment: Discount Agreement								

		ADR	Patrick								
	Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client L. Melhem, G. Hughes, R. Cavazos, P. Osterloh, and J. Jackson re strategy for counter to Cities, TEAM, and ARM settlement proposals /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 22.20 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										
142	07/29/2022	Fee	L160 Settlement/Non-Binding ADR	Pearsall, Patrick	370.00	0.60	11.10	0.00	0.00		210.90
	Activity: A104 Review/analyze Description: Settlement/Non-binding ADR Review/Analyze issues re settlement strategy and response to Cities, TEAM, and ARM proposals /PUCT-Settlement Activities. Adjustment: 08/11/2022 - Amount adjusted by 11.10 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 5% discount to vendor fees per billing discount agreement										

Completed Requests

Item	Request Name	Requestor	Request Date	Completion Date	Comment	Outcome
1	Post Invoice for 14,046.72 USD	Duggins Wren Mann & Romero, LLP	08/11/2022	08/17/2022		Approved
	Approval History					
	Stop	Performer	Activity	Date/Time	Internal Comment	
	1	Melhem, Leila	Approved	08/17/2022 03:19 PM		

	Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
7	08/02/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.10	1.72	0.00	0.00		22.78
	Activity: A108 Communicate (other external) Description: Settlement/Non-binding ADR Communicate with other external M. Arth re settlement agreement term /PUCT-Settlement Activities. Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
8	08/02/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.20	3.43	0.00	0.00		45.57
	Activity: A108 Communicate (other external) Description: Settlement/Non-binding ADR Communicate with other external J. Harrison at Staff re information provided and motion to abate /PUCT-Settlement Activities Adjustment: 09/14/2022 - Amount adjusted by 3.43 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
9	08/02/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.20	3.43	0.00	0.00		45.57
	Activity: A103 Draft/revise Description: Settlement/Non-binding ADR Draft/Revise Motion to Abate /PUCT-Settlement Activities Adjustment: 09/14/2022 - Amount adjusted by 3.43 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
10	08/02/2022	Fee	L160 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.10	1.72	0.00	0.00		22.78
	Activity: A104 Review/analyze Description: Settlement/Non-binding ADR Review/Analyze L. Melhem revisions to draft /PUCT-Settlement Activities Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
11	08/02/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.20	5.18	0.00	0.00		68.82
	Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze issues re abating proceeding /PUCT-Overall Case Strategy. Adjustment: 09/14/2022 - Amount adjusted by 5.18 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
12	08/02/2022	Fee	L210 Pleadings	Pearsall, Patrick	370.00	0.20	5.18	0.00	0.00		68.82
	Activity: A104 Review/analyze Description: Pleadings Review/Analyze motion to abate /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 09/14/2022 - Amount adjusted by 5.18 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
13	08/02/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.20	5.18	0.00	0.00		68.82
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze issues re supplemental response to Staff 1-1 /PUCT-Discovery. Adjustment: 09/14/2022 - Amount adjusted by 5.18 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
14	08/03/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.10	1.72	0.00	0.00		22.78
	Activity: A106 Communicate (with client) Description: Other Written Motions and Submissions Communicate with client R. Dubberstein re status of abatement filing /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
15	08/03/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.10	1.72	0.00	0.00		22.78
	Activity: A108 Communicate (other external)										

	Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
16	08/03/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.10	1.72	0.00	0.00	22.78
	Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze communication from Staff J. Harrison re motion to abate filing /PUCT-Non-Discovery Pleadings and Motions. Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
17	08/03/2022	Fee	L250 Other Written Motions/Submissions	Green, Stephanie	245.00	0.10	1.72	0.00	0.00	22.78
	Activity: A108 Communicate (other external) Description: Other Written Motions and Submissions Communicate with other external M. Arth re sign off and approval of agreed motion to abate /PUCT-Non-Discovery Pleadings and Motions Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
18	08/03/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.72	0.00	0.00	22.78
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client R. Cavazos et al re supplement to Staff 1-1 /PUCT-Discovery Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
19	08/03/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.72	0.00	0.00	22.78
	Activity: A103 Draft/revise Description: Written Discovery Draft/Revise supplement to Staff 1-1 for review /PUCT-Discovery Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
20	08/03/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.20	5.18	0.00	0.00	68.82
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze J. Harrison re supplemental response to Staff 1-1 /PUCT-Discovery. Adjustment: 09/14/2022 - Amount adjusted by 5.18 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
21	08/03/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.10	2.59	0.00	0.00	34.41
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P. Osterloh and R. Cavazos re Staff request for supplemental response to Staff 1-1 /PUCT-Discovery. Adjustment: 09/14/2022 - Amount adjusted by 2.59 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
22	08/03/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.10	2.59	0.00	0.00	34.41
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze supplemental response to Staff 1-1 /PUCT-Discovery. Adjustment: 09/14/2022 - Amount adjusted by 2.59 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
23	08/08/2022	Fee	L250 Other Written Motions/Submissions	Jones, Jackie	155.00	0.20	2.17	0.00	0.00	28.83
	Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze SOAH Order No. 2 and update procedural schedule re same /PUCT-Overall Case Administration. Adjustment: 09/14/2022 - Amount adjusted by 2.17 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
..	08/09/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.72	0.00	0.00	22.78

	Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
25	08/09/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.30	5.14	0.00	0.00	68.36
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P. Osterloh re Staff request /PUCT-Overall Case Strategy. Adjustment: 09/14/2022 - Amount adjusted by 5.14 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
26	08/09/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.72	0.00	0.00	22.78
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client L. Melhem re Staff request and data /PUCT-Overall Case Strategy. Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
27	08/09/2022	Fee	L250 Other Written Motions/Submissions	Jones, Jackie	155.00	0.20	2.17	0.00	0.00	28.83
	Activity: A104 Review/analyze Description: Other Written Motions and Submissions Review/Analyze SOAH Order No. 3 and update procedural calendar re same /PUCT-Overall Case Administration. Adjustment: 09/14/2022 - Amount adjusted by 2.17 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
28	08/09/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.10	2.59	0.00	0.00	34.41
	Activity: A108 Communicate (other external) Description: Written Discovery Communicate with other external Staff counsel J. Harrison re supplemental response to Staff 1-1 /PUCT-Discovery Adjustment: 09/14/2022 - Amount adjusted by 2.59 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
29	08/11/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	3.43	0.00	0.00	45.57
	Activity: A108 Communicate (other external) Description: Written Discovery Communicate with other external J. Harrison re request for clarification re Staff 1-1 /PUCT-Overall Case Strategy. Adjustment: 09/14/2022 - Amount adjusted by 3.43 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
30	08/11/2022	Fee	L350 Discovery Motions	Green, Stephanie	245.00	0.70	12.00	0.00	0.00	159.50
	Activity: A103 Draft/revise Description: Discovery Motions Draft/Revise response to OPUC motion to compel /PUCT-Discovery. Adjustment: 09/14/2022 - Amount adjusted by 12.00 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
31	08/11/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.20	5.18	0.00	0.00	68.82
	Activity: A104 Review/analyze Description: Analysis/Strategy Review/Analyze issues re Staff's request for additional information concerning expenses for internal administration and research and development /PUCT-Overall Case Strategy. Adjustment: 09/14/2022 - Amount adjusted by 5.18 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
32	08/16/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.72	0.00	0.00	22.78
	Activity: A108 Communicate (other external) Description: Written Discovery Communicate with other external J. Harrison re Staff 1-1 /PUCT-Discovery. Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement									
--	08/16/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.72	0.00	0.00	22.78

	Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
34	08/16/2022	Fee	L310 Written Discovery	Pearsall, Patrick	370.00	0.30	7.77	0.00	0.00		103.23
	Activity: A104 Review/analyze Description: Written Discovery Review/Analyze issues re Staff request for further supplementation of Staff 1-1 /PUCT-Discovery. Adjustment: 09/14/2022 - Amount adjusted by 7.77 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
35	08/17/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.72	0.00	0.00		22.78
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client P. Osterloh and team re Staff request /PUCT-Discovery Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
36	08/21/2022	Fee	L120 Analysis/Strategy	Green, Stephanie	245.00	0.10	1.72	0.00	0.00		22.78
	Activity: A106 Communicate (with client) Description: Analysis/Strategy Communicate with client P. Osterloh re Staff request for additional information /PUCT-Overall Case Strategy. Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
37	08/21/2022	Fee	L180 Settlement/Non-Binding ADR	Green, Stephanie	245.00	0.10	1.72	0.00	0.00		22.78
	Activity: A104 Review/analyze Description: Settlement/Non-binding ADR Review/Analyze issues re status of matter and preparation of settlement docs /PUCT-Settlement Activities Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
38	08/22/2022	Fee	L120 Analysis/Strategy	Pearsall, Patrick	370.00	0.10	2.59	0.00	0.00		34.41
	Activity: A108 Communicate (other external) Description: Analysis/Strategy Communicate with other external Staff counsel J. Harrison re filing package Schedule D /PUCT-RFP Schedules. Adjustment: 09/14/2022 - Amount adjusted by 2.59 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
39	08/23/2022	Fee	L160 Settlement/Non-Binding ADR	Pearsall, Patrick	370.00	0.30	7.77	0.00	0.00		103.23
	Activity: A106 Communicate (with client) Description: Settlement/Non-binding ADR Communicate with client L. Melhem re preparation of settlement documents and Schedule D bonus calculation /PUCT-Settlement Activities Adjustment: 09/14/2022 - Amount adjusted by 7.77 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
40	08/23/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.20	3.43	0.00	0.00		45.57
	Activity: A106 Communicate (with client) Description: Written Discovery Communicate with client L. Melhem re Staff request for clarification concerning Schedule D /PUCT-Discovery. Adjustment: 09/14/2022 - Amount adjusted by 3.43 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
41	08/23/2022	Fee	L310 Written Discovery	Green, Stephanie	245.00	0.10	1.72	0.00	0.00		22.78
	Activity: A101 Plan and prepare for Description: Written Discovery Plan and prepare for filing supplement to Staff 1-1 /PUCT-Discovery. Adjustment: 09/14/2022 - Amount adjusted by 1.72 - system, system Reason for Adjustment: Discount Agreement Comments to Requestor: 7% discount to vendor fees per billing discount agreement										
	08/23/2022	Fee	L160 Settlement/Non-Binding	Green,	245.00	0.10	1.72	0.00	0.00		22.78