

## 10/14/2021 CTEB EVALUATION PROJECT DATA REQUEST TIMELINES

### Notes

Working to track 4 dates (Request/due; Call; utility commitment/agreement; delivery); working to get all contractors on all steps

	C1901 - C&I Sector-Wide Process Evaluation (non-SBEA)	
	5/25/2021	C1901. Eversource responded to follow-up questions.
Old - Resolved to degree possible. 107 Lines of data tracking.	6/2/2021	C1901. All data issues/questions have been resolved the best they can.
	C1906 SEM Design and Evaluation	
	7/16/2021	Process evaluation data request to Eversource
	7/16/2021	Process evaluation data request to UI
	7/22/2021	Process evaluation data request call with UI
Done with data requests (3 lines)	7/28/2021	Process evaluation data request call with Eversource
		1/0/1900
	R1959 Single-Family Renovations & Additions Potential Analysis	
Started data requests	11/8/2019	Submitted data request 1a and 1b (due Nov 27)
	1/31/2020	Dick indicated that UI does not have information to share
Done with data requests (12 lines)	Summary	All data requests are fulfilled
	R1965 HP/HPWH Baseline and Potential Assessment	
Started data requests	1/13/2020	Submitted data request 1 (due dates vary by component: 1/24, 2/21, and 2/28)
	1/14/2020	Dick and Miles provided dates they could attend the call
	7/8/2020	Another data call scheduled but canceled by UI
UI - Resolved, but not well	7/15/2020	UI sends new data file (request 1b)
	8/26/2020	Miles provides data clarification on overlap (request 1b)
Done with data requests (70 lines of data tracking)	Summary	Data requests complete (moving forward regardless of data problems)
		1/0/1900
	R1982.HVAC/DHW Performance and Potential Evaluation	
Data requests start	2/5/2020	data request call with NMR and UI to confirm that UI can deliver HP program data by 2/21/20.
	7/16/2020	UI sent data to NMR / Evergreen
Not resolved well	8/4/2020	NMR and Evergreen discussed data from UI, and data from Eversource (previously) and are working to line everything up. We do not expect to go back to UI at this point.
	8/4/2020	NMR sent additional details to Evergreen regarding the files received to-date.
	8/6/2020	Evergreen provided recommended edits to NMR survey questions related to soft recruitment of potential R1982 participants
	10/7/2020	Evergreen and NMR coordinating on finalizing recruitment database
	11/23/2020	Emailed the EA Team about adding 2020 program participants to the study sample; Lisa confirmed
Sent data request; utilities requested delay in data discussion meeting	1/27/2021	Emailed data request for 2020 program records to UI and Eversource
	1/28/2021	Scheduled UI data request meeting for 2/1/21
	2/1/2021	UI requested a later date due to weather
	2/1/2021	Sent doodle poll to UI to select meeting time
	2/1/2021	Eversource responded and requested that the meeting be scheduled for mid-February
Data request meetings	3/2/2021	Data request meeting with Eversource
4 wks later than expected	3/2/2021	UI data request meeting postponed until Joel returns
Data received	4/1/2021	All data received; no outstanding data requests at this time.
	7/8/2021	Requested appending names to Eversource HPWH program participation records for recruitment
Requested time	7/27/2021	Eversource informed Evergreen that it will take an additional 2 weeks to provide contact information
Unclear status		1/0/1900
		1/0/1900
	X1931 In-Depth PSD Review	
	2/14/2020	Data for this project included in x1939 request. Data request #1 submitted to EA team - request for program tracking data
	10/21/2020	Data request #2 submitted
	10/26/2020	Phone call with UI and Eversource to discuss data request #2
	10/27/2020	Data delivery from UI and Eversource
		1/0/1900
		1/0/1900
	X1939 Early Retirement	
	2/14/2020	Data request #1 submitted to EA team - request for program tracking data
	3/5/2020	Data request #1 sent to Utilities
	3/13/2020	Data request #1 call with Utilities
ES provided data; UI not mentioned	3/31/2020	Eversource provided data for Data Request #1
	4/10/2020	UI provided commercial data
	4/29/2020	Phone call w/UI about residential data
	6/17/2020	Phone call w/UI about upstream and SBEA data, also briefly discussed residential data

	7/13/2020	UI provided residential data
	9/13/2021	Data request # 2 sent to utilities
	X1932 - Demand Response	
	5/22/2020	Draft data request to EA team
	6/9/2020	Data request to UI
	12/2/2020	Data request call with UI and EA Team (Attendees: Joel K., Paul G., Richard O., UI; Lisa S. Bob W., Ralph P., EA Team; Kiersten vT,
	12/8/2020	Submitted revised data request to UI
	12/22/2020	Received some program materials from UI
	12/29/2020	Received some program materials from UI
	1/6/2021	Data request call with EnergyHub (Attendees: Joel K., Paul G., Richard O., UI; Lisa S., EA Team; Kiersten vT, Yogi P., NMR; Aaron S
	1/12/2021	Google security assessment information submitted by DSA
	1/26/2021	DSA answered additional data security questions for EnergyHub
	1/29/2021	EnergyHub created example runtime reports for DSA's review
	2/16/2021	Received thermostat participation data from EnergyHub
	2/24/2021	Received runtime data from EnergyHub
	3/26/2021	Memo summarizing the telemetry review sent to EnergyHub
	3/29/2021	Working on additional EnergyHub questions
	4/23/2021	Call with EnergyHub to discuss the telemetry memo. We will append the memo with call notes and a suggested sampling approa
	5/10/2021	Uploaded sample accounts to UI for AMI data request
	5/24/2021	Followed up with UI about AMI data due 5/28
	5/26/2021	Sent data request memo to Eversource for review
	5/27/2021	UI responded with some questions; updated due date to 6/4
	6/9/2021	Followed up with UI about AMI
	6/9/2021	UI responded with some questions and we responded
	6/11/2021	Sent final data request to Eversource
	6/15/2021	UI responded with some questions
	6/22/2021	UI sent data in a format we couldn't open
	6/22/2021	UI reposted data in accessible format
	Summary	Data request delivery in progress
	R2029 SF Weatherization Assessment and Update	
	N/A	See R1983 for most data request communications, as R2029 data is coming through R1983, but not all R2029 data was included,
	3/2/2021	Awaiting WAP data
Awaiting data	to present -	Awaiting WAP data
Partial workaround		Meeting held with utilities - may have found workaround on WAP Data
	X1942 NEIs	
	12/18/2020	Arrearage-related Historical details as part of the R1983 data request
	1/12/2021	Arrearage-related Historical details as part of the updated R1983 data request to Companies
	4/13/2021	Sent UI specific email about X1942 arrearage data
	4/21/2021	Followed up with Eversource about arrearage data
	4/22/2021	UI sent X1942 arrearage data
	5/4/2021	Followed up with Eversource about arrearage data
Awaiting Arrearage data	5/11/2021	Followed up with Eversource about arrearage data
	5/18/2021	Followed up with Eversource about arrearage data
	5/25/2021	Followed up with Eversource about arrearage data
Awaiting Arrearage data	5/27/2021	Followed up with Eversource about arrearage data
	6/4/2021	Followed up with both utilities about remaining items
	6/10/2021	Emailed UI to arrange a meeting to discuss arrearage data request
	6/11/2021	Followed up with Eversource about arrearage data
	6/11/2021	Meeting with UI about arrearage data
	6/11/2021	UI sent last piece of arrearage data; X1942 UI Data Request complete
	6/11/2021	Met with UI to discuss arrearage data request
	6/11/2021	UI sent some updated arrearage data
	6/15/2021	Eversource responded with some answers about arrearage data
	6/24/2021	Eversource emailed with follow up questions about arrearage data and we responded
	6/28/2021	Followed up with UI asking for ID#s in the arrearage data to match to program data
	6/29/2021	UI responded saying they'll check
	7/2/2021	Followed up with Eversource about arrearage data missing some vital variables
	7/6/2021	Followed up with UI about arrearage data request
	7/7/2021	Followed up with Eversource again
Awaiting Arrearage data	7/13/2021	Followed up with Eversource again
	7/27/2021	Followed up with Eversource again
	8/3/2021	Followed up with Eversource again
Awaiting Arrearage data	8/10/2021	NMR met with Eversource to discuss remaining X1942 data request
	8/18/2021	NMR met with Eversource again to discuss X1942, R2029, and R1983 data
	8/30/2021	Followed up with Eversource again
Successful meetings	9/9/2021	NMR met with Eversource to discuss remaining X1942 data request
	9/17/2021	Received Eversource data for arrearages and shut offs
	10/4/2021	Asked utilities about availability of participant contact information for SBEA program
	10/5/2021	Followed-up with Eversource about participation rates in Eversource's rate discount program among eligible low income custom

	Summary	See R1983 for more details; Received some arrears-related data from Utilities.
	X1931-1 ISP Comm Boiler & Furnace Study	
	1/0/1900	1/0/1900
	X1931-2 Coincidence Factor and Loadshape Study	
	1/0/1900	1/0/1900
	X1931-3 New Measure Compressed Air Systems	
	1/0/1900	1/0/1900
	X1931-4 New Measure Advanced Lighting Controls	
	1/0/1900	1/0/1900
	X1931-5 Comm Refrigeration Efficiency Update Study	
	1/0/1900	1/0/1900
	X1931-6 Hours of Use Documentation	
	1/0/1900	1/0/1900
	X1931-7 Degree Days Update Study	
	1/0/1900	1/0/1900
	1/0/1900	
	1/0/1900	1/0/1900
	C2014 C&I Lighting Saturation and Remaining Potential	
	10/1/2020	made the request to ODC to get the dataset of record they prepared for C1901
	1/4/2021	ODC gathered additional data from utilities and is working on consolidating the consumption and tracking data into a master dat
	3/1/2021	processed dataset for both Eversource and UI
	4/5/2021	received upstream distributor contact info from ODC
		1/0/1900
	CT X2022 - Education and Engagement Evaluation	
	1/5/2021	Data Request - 1 sent to Eversource and UI
	1/19/2021	Data request -1 Part 1 -- deadline
	1/19/2021	Data Request - 1 Part 1 - data received
	1/26/2021	Data discussion with Eversource and UI
	2/1/2021	Additional Data received - UI
	2/4/2021	Additional Data received - UI
	2/26/2021	Data Request 2 - sent to utilities
	3/19/2021	Deadline for data request 2
	3/19/2021	Data received from utilities
	5/4/2021	Data request 3 - sent to utilities
	5/13/2021	Data received from utilities
	5/26/2021	Data request 4 sent to utilities - Educate the public and eversource customer Engagement
	6/7/2021	Data received from utilities in response to Data request 4
	6/11/2021	Data Request 5 sent to Eversource
	6/22/2021	Data received from Eversource
	9/3/2021	Data request 6 sent to utilities
	9/17/2021	Data request 6 response received
		1/0/1900
	X2001 - EUL	
	12/24/2020	Submitted Data Request #1.
	1/8/2021	Met with utilities to discuss data availability
	1/21/2021	Discussed delay of data processing with Eversource. New due date set for week of 2/2
	1/22/2021	Received data from UI
	2/11/2021	Received initial set of data files from Eversource
	2/11/2021	Communicated with Eversource about missing residential data
	2/17/2021	Received full set of data from Eversource

	1/0/1900	1/0/1900
	R1983 - HES & HES-IE Process / Impact Evaluation	
	7/13/2020	Preliminary data call
	8/14/2020	Awaiting data - deadline extended (Data request for HES/HES-IE Program Materials, QA/QC Vendor Inspection Reports/Tracking
	12/11/2020	Data request Meeting
	12/11/2020	Data request meeting with both utilities
	12/16/2020	Doug sent out notes from meeting
	12/18/2020	Doug sent revised data request + program design doc to EA Team
	1/7/2021	Received comments from EA team on data request
	1/11/2021	Sent updated data request to utilities
	1/21/2021	Asked utilities for Recurve reports
	1/22/2021	Received Recurve report from Eversource
	1/28/2021	UI asked for a week long extension
	2/3/2021	UI sent over files but they were empty
	2/4/2021	Eversource sent over files for Item A
	2/4/2021	UI sent over data
	2/8/2021	Eversource sent over files
	2/9/2021	UI sent over data
	2/10/2021	UI sent over data
	2/11/2021	Eversource sent over files for Item D
	2/11/2021	Sent UI notes on what is missing and questions
	2/12/2021	UI answered some questions
	2/17/2021	UI sent over data but I could not extra data from them
	2/18/2021	Eversource sent over files for Item C
	2/18/2021	Eversource gives permission for NMR to contact Recurve
	2/19/2021	UI posted data to NMR's SharePoint
	2/19/2021	Eversource sent over more files for Item A
	2/25/2021	UI attempted to send over more data
	3/3/2021	Eversource sent over files for Item D
	3/3/2021	Doug reached out to Recurve for UI data
	3/5/2021	Asked Eversource to prioritize vendor + customer data
	3/8/2021	Eversource says they can get that to us in 4 weeks
	3/9/2021	UI gives permission for NMR to contact Recurve
	3/11/2021	Meeting with Recurve
	3/16/2021	Recurve uploaded UI data
	3/17/2021	Meeting with Recurve to discuss Eversource
	3/22/2021	Sent email identifying missing data and questions for UI
	3/23/2021	Sent email identifying missing data and questions for Eversource
	3/23/2021	Eversource responded with delivery dates
	3/24/2021	Followed up with Recurve - UI questions
	3/25/2021	Followed up with UI to see if they received 3/22 email
	3/27/2021	Recurve uploaded more UI data
	3/29/2021	Eversource sent over files for Item G
	3/29/2021	UI experiencing IT issues
	3/30/2021	Data request meeting with Eversource
	3/31/2021	Many failed transfer attempts from UI 3/30 + 31
	4/1/2021	UI sent over more files - but for the wrong project
	4/2/2021	Eversource sent over some more files for Item E
	4/2/2021	UI sent over more files
	4/2/2021	UI responded to email from 3/22
	4/6/2021	Data request meeting with UI
	4/8/2021	Doug sent updated/simplified data request to UI
	4/12/2021	Followed up with UI to see if they received 4/8 email
	4/12/2021	Followed up with Eversource about missing data
	4/13/2021	Sent UI specific email about X1942 arrearage data
	4/14/2021	UI sent over more files - one duplicate and one corrupt
	4/15/2021	Followed up with UI about 4/14 data
	4/16/2021	UI sent over more files
	4/16/2021	Eversource sent over more files for Item C
	4/19/2021	UI sent over more files
	4/21/2021	UI sent over more files - one corrupt
	4/21/2021	Followed up with Eversource about arrearage data
	4/21/2021	Followed up with UI about arrearage data
	4/21/2021	Doug sent questions to utilities
	4/22/2021	Eversource sent over more files for Item C
	4/22/2021	UI sent over more files (via Glen Eigo to NMR SharePoint)
	4/22/2021	UI sent X1942 arrearage data
	4/23/2021	Eversource sent over more files for Items C, E, and G
	4/28/2021	Sent follow up questions to Eversource and UI
	4/29/2021	UI sent more data
	5/4/2021	Sent follow up questions to Eversource and UI
	5/5/2021	UI sent more data and answered questions

Multiple delays; but need better tracking of DR#s.	5/6/2021	UI sent more data
	5/6/2021	Responded to questions
	5/7/2021	Sent follow up questions to Eversource and UI
	5/7/2021	UI sent some answers
	5/10/2021	Sent questions to UI about data discrepancies + additional data
	5/11/2021	Followed up with Eversource about remaining items and questions
	5/11/2021	Eversource responded with updates on items
	5/12/2021	Followed up with Eversource with more questions
	5/14/2021	Eversource sent over some more files for Items D and F
	5/18/2021	Followed up on questions to UI about data discrepancies
	5/18/2021	Followed up with UI about arrearage data
	5/19/2021	UI sent additional data but didn't answer questions
	5/19/2021	UI sent some of the arrearage information requested
	5/19/2021	Followed up with Eversource about remaining items and questions
	5/19/2021	Eversource sent over more files
	5/19/2021	Followed up with Eversource with a new list of remaining items
	5/20/2021	UI sent more data - ends up being duplicate data
	5/20/2021	Set up meeting to discuss questions and missing items with UI
	5/24/2021	Meeting with UI - Attended by Dick Oswald, Joel Kopylec (UI); Lisa Skumatz, Bob Wirtshafter (EA Team); Glenn Gavi (DNV), Eric D
	5/25/2021	Followed up with Eversource about remaining items and questions
	5/26/2021	UI sent one of the remaining files
	5/27/2021	Eversource sent over more files
	5/27/2021	Followed up with Eversource about arrearage data
	6/2/2021	Followed up with both utilities about remaining items
Problematic - in progress	6/4/2021	Followed up with both utilities about remaining items
	6/4/2021	Followed up with UI about remaining items
	6/10/2021	Eversource sent some of the remaining items
	6/10/2021	Emailed UI to arrange a meeting to discuss arrearage data request
	6/11/2021	Followed up with Eversource about arrearage data
	6/11/2021	Meeting with UI about arrearage data
	6/11/2021	UI sent last piece of arrearage data; X1942 UI Data Request complete
	6/11/2021	Met with UI to discuss arrearage data request
	6/11/2021	UI sent some updated arrearage data
	6/15/2021	Eversource responded with some answers about arrearage data
	6/15/2021	Followed up with both utilities asking for monthly consumption data
	6/15/2021	UI responded with questions about consumption data request and we responded
	6/16/2021	Eversource responded with 3 week turnaround time for monthly consumption data
	6/17/2021	UI responded with questions about consumption data request and we responded
	6/22/2021	Sent Eversource request for replacements of two files that were missing data
	6/22/2021	Followed up with UI about consumption data request
	6/24/2021	Eversource emailed with follow up questions about arrearage data and we responded
	6/28/2021	Checked in with Eversource about remaining items
	6/28/2021	Followed up with UI about consumption data request
	6/28/2021	Followed up with UI asking for ID#s in the arrearage data to match to program data
	6/29/2021	UI responded saying they'll check
	7/1/2021	Eversource sent some of the remaining items
	7/2/2021	Followed up with Eversource about arrearage data missing some vital variables
	7/6/2021	Followed up with UI about arrearage data request
	7/7/2021	Followed up with Eversource again
	7/7/2021	UI sent some updated arrearage data
	7/7/2021	UI responded saying no updated turnaround date for consumption data
Problematic - in progress - dates, partial data, awaiting data, "they'll check"...	7/7/2021	UI sent sample of consumption data to make sure it was what we were looking for
	7/7/2021	R1983 team check data and responded to UI
	7/8/2021	UI responded saying they would try but gave no date
	7/13/2021	Followed up with Eversource about remaining items and added another missing item
	7/13/2021	Followed up with UI about remaining items; they responded saying it's in progress
	7/13/2021	NMR emailed UI and Eversource clarifying questions about HES/HES-IE Data
	7/14/2021	Eversource responded; key data person out on vacation
	7/15/2021	Eversource sent monthly consumption data
	7/15/2021	UI responded to some HES/HES-IE Data clarifying questions
	7/15/2021	Eversource responded to some HES/HES-IE Data clarifying questions
	7/15/2021	NMR followed up with Eversource with insulation question
	7/19/2021	UI posted monthly consumption data to NMR's SharePoint
	7/19/2021	UI and NMR exchanged emails about the data
	7/21/2021	Eversource followed up to check in on request
	7/23/2021	NMR followed up with UI about HES/HES-IE Data clarifying questions
Reviewing data	7/27/2021	Followed up with Eversource about arrearage data; they responded saying it was in progress
	7/27/2021	Posted list of UI IDs that were missing a crosswalk
	7/27/2021	UI responded to some HES/HES-IE Data clarifying questions

	8/2/2021	Followed up with Eversource about arrearage data
	8/2/2021	Followed up with UI about IDs
	8/3/2021	UI posted crosswalk data
	8/3/2021	NMR followed up with Eversource about X1942 data request
	8/4/2021	UI updated that the monthly consumption data extract would take up to 2-3 weeks
	8/4/2021	UI posted 2017 monthly consumption data
	8/10/2021	UI posted 2018-2019 monthly consumption data
	8/10/2021	UI responded to some HES/HES-IE Data clarifying questions
	8/10/2021	NMR followed up with UI about HVAC program data
	8/10/2021	NMR met with Eversource to discuss remaining X1942 data request
	8/11/2021	NMR followed up with Eversource about HVAC program data
	8/12/2021	NMR followed up with Eversource again on insulation question
	8/13/2021	Eversource responded they're looking into the HVAC program data
	8/14/2021	Met with UI to discuss HES/HES-IE Data clarifying questions
	8/16/2021	NMR sent mapping workbook to both UI and Eversource
	8/18/2021	UI posted more monthly consumption data
	8/18/2021	NMR met with Eversource again to discuss X1942, R2029, and R1983 data
	8/19/2021	EA Team approved moving forward with the vendor data request for R2029
	8/19/2021	NMR notified Eversource of added vendor data request for R2029
	8/19/2021	NMR followed up with Eversource with notes and action items from 8/18 meeting
	8/20/2021	UI posted the rest of the monthly consumption data
	8/23/2021	NMR notified UI of some corrupt files
	8/25/2021	UI posted clean versions of the corrupt files
	8/25/2021	Eversource updated on vendor data request for R2029
	8/30/2021	NMR followed up with Eversource about remaining X1942 data request
Some recent problems; resolving?	9/2/2021	Call with Eversource to discuss WAP-related data
	9/2/2021	Eversource sent over some WAP-related data
	10/5/2021	NMR followed up with Eversource about remaining X1942 data request
Reviewing data recently received. (166 lines of data tracking)	Summary:	Reviewing data from Utilities; Data request in progress.
	1/0/1900	1/0/1900