

## 9/13/2021 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)	
	1/31/2020	Met with UI to clarify program material request
	10/17/2019	Met with UI to confirm understanding of UI's C&I programs and understand what data are available
Started Data requests	11/7/2019	ODC sends Data Request #1 to UI and Eversource. Requested available data/materials by 12/6/19
	11/15/2019	Discussed data request #1 with UI and Eversource. Utilities agree to provide program materials and 2017-18 data by 12/13 and 2019 data in early 2020
	11/22/2019	ODC sends final data request #1 with some changes to original based on discussions with utilities on 11/15. Email also includes request to confirm dates requested data can be provided.
	11/22/2019	ODC sends UI invitation to file sharing site
	12/2/2019	UI responds saying that they are required to use their own file sharing site and asks for ODC contacts
	12/2/2019	ODC sends lists of contacts for UI file sharing site
	12/4/2019	Requested list of 2017-2019 SBEA participants via email
	12/12/2019	ODC sends reminder about Data Request #1 to UI and Eversource, asking for status on program materials and 2017-18 data
	12/17/2019	UI responds saying that they are close to getting contract signed
	12/20/2019	Received program materials from Eversource
	1/13/2020	Received 2017-2018 program data from Eversource
	1/24/2020	Received 2019 program data from Eversource
	1/23/2020	ODC holds project kickoff call. UI asks during call if there have been any data requests.
	1/23/2020	Dakers Gowans forwards UI final data request #1 from 11/22/19
	1/23/2020	UI emails asking for list of ODC contacts for UI file sharing system
	1/31/2020	UI and ODC have conference call to discuss data request #1. UI agrees to provide program materials and data by 2/14
	2/4/2020	UI sends ODC contract for evaluation
	2/7/2020	ODC sends follow up email restating UI's delivery of program materials and data by 2/14
	2/13/2020	UI sends ODC program materials. ODC asks when to expect program/customer data, UI says "sometime in the next few days, I hope."
	2/19/2020	ODC follows up with UI asking about status on program/customer data. No response.
	3/3/2020	ODC sent email to UI checking on data status. No response.
ES data ok; missing UI data	3/26/2020	UI provided initial data. Request not complete; needs follow-up.
	3/31/2020	Eversource provided request #2.
	4/1/2020	Posed additional questions to UI about most recent data submission.
	4/2/2020	Posed additional questions to UI about most recent data submission.
	4/6/2020	Conducted phone call with Eversource about data
	4/8/2020	Received email from UI saying they are working on questions
	4/9/2020	Provided Eversource files with problem cases
	4/10/2020	Clarified with Eversource the location of the files provided on the 10th.
	4/20/2020	Eversource provided quartile data
	4/20/2020	UI provided a sample population file for us to review
	4/22/2020	Posed additional questions to UI about most recent data submission.
	4/24/2020	Received upstream lighting data from Eversource
	4/27/2020	Posed question to Eversource about upstream lighting data
	4/30/2020	Received distributor contact info from Eversource
	5/5/2020	Received updated Customer Popn file from UI.
	5/6/2020	Received responses to some questions from UI
	5/8/2020	Received email from Eversource providing responses to some key questions.
	5/18/2020	Received new participant data from UI.
	5/19/2020	Posted some new questions for UI
	5/19/2020	Received email from Eversource providing data field definitions
	5/20/2020	Message from UI with partial responses to questions; issues still pending
	5/20/2020	Received email from Eversource providing additional clarification on rate codes and verification of program coding.
	5/20/2020	Sent email to Eversource asking for clarification on how they distinguish different ECB pathways.
	5/22/2020	Received additional responses to pending questions from UI. Notes that we are awaiting several files (UL, contractor info, near parts)
	5/27/2020	Received email from Eversource clarifying ECB project pathways.
	6/8/2020	Received email from UI responding to some pending questions
	6/10/2020	Eversource responded to question about UL data
	6/11/2020	Received UL data from UI
	6/12/2020	Received partial participant data from UI
	6/14/2020	Received some data definition info from Eversource
	6/17/2020	Received updated UI C&I Popn file
	6/17/2020	Received additional data clarifications from Eversource
	6/22/2020	Received vendor data file from UI
	6/23/2020	Received some data clarification questions from UI
	7/6/2020	Asked UI question about "qualifiers" field
	7/13/2020	UI submitted additional BES data
	7/15/2020	Submitted question to UI re upstream lighting classification
	7/28/2020	Re-inquired about upstream lighting question and posed question about email addresses
UI - Possibly resolved	7/31/2020	UI responded saying they have no more email addresses.
	8/11/2020	UI reached out to acknowledge they owed us some answers, but have been too busy with storm duties to respond.

1/0/1900

	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	
	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 wUI about residential data	
	6/17/2020	Phone call wUI about upstream and SBEA data, also briefly discussed residential data	
	7/13/2020	UI provided residential data	
			1/0/1900
	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 apprao	
	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
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 IDs 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	Summary	See R1983 for more details; Awaiting arrearage-related data from Utilities. Cannot begin analysis until the data are provided
	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 data
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
	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
	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?	Summary:	Reviewing data from Utilities; Data request in progress.