

UWUO YEAR-ROUND REPORTING CALENDAR

A practical monthly checklist for spreading the work across the year

ABOUT 5 HOURS A MONTH

Turn December into final assembly...not a 60-hour data rescue.

REVIEW	RECONCILE	PREPARE
Look for flags, changes, and inconsistencies while there is still time to act.	Make upstream reports tell the same story before they feed the UWUO.	Pull data early so Q4 is for QA/QC, clarification and submission.

How to use this calendar

Block a recurring half-day each month. Use the checklist as a working review, not just a deadline tracker. If a task does not apply, mark it N/A. If an issue appears, assign an owner and resolve it before the next monthly check-in.

Note: Acronyms are found on the last page of this document. This draft is an operating calendar, not a substitute for current DWR, State Water Board, CEC, or other agency instructions. Confirm official deadlines, reporting windows, forms, and data-release dates each year before publishing.

Q1 | Review the Prior Year and Fix the Foundation

Start the next UWUO cycle by understanding last year's results, correcting upstream reporting where appropriate, and identifying data you may need later for variances or other adjustments.

JANUARY ~5 HOURS	FEBRUARY ~5 HOURS	MARCH ~5 HOURS
☐ Review the submitted UWUO report and debrief on last year's reporting processes. ☐ Create an issue log: what needs clarification, correction or monitoring this year? ☐ Create a schedule and schedule a recurring reporting review block. ☐ Check for upcoming deadlines and assess readiness to meet those deadlines ☐ <i>Optional:</i> Identify potential variance pathways and the data each would require.	☐ Begin eAR and AIR preparation; confirm internal owners and source datasets. ☐ Compare connections, population, production and other overlapping fields across reports. ☐ Review SAFER reporting and update/reconcile records as appropriate. ☐ <i>Optional:</i> Start collecting supporting data now if a variance may be pursued later. ☐ <i>Optional:</i> Understand processes to check for new residential landscape area or development changes that need tracking.	☐ Review the State Water Board-generated prior-year summary for data issues, flags or inconsistencies. ☐ Complete internal QA/QC of eAR and AIR before submission. ☐ Reconcile SAFER data to values used in other reporting. ☐ Confirm how CII accounts are classified and identify known classification issues. ☐ Close or assign unresolved prior-year data flags. ☐ <i>Optional:</i> Review known landscape changes and maintain a running change log.

Q2 | Reconcile, Validate, and Prepare for Mid-Year

Keep upstream datasets aligned and prepare for mid-year reporting activities. If a variance may be needed in Q3, this is still data-collection season.

APRIL ~5 HOURS	MAY ~5 HOURS	JUNE ~5 HOURS
☐ Review completed eAR/AIR against SAFER and internal source data. ☐ Review residential landscape additions or changes since the last approved dataset. ☐ Check CII classification process, begin cleanup progress and unresolved account questions. ☐ Document corrections and retain supporting files. Resubmit corrected UWUO report (<i>optional</i>). ☐ <i>Optional</i>: Continue collecting variance-supporting data.	☐ Prepare the validated Water Loss Audit workflow and internal review schedule. ☐ Check production, connections and customer classifications for unusual changes. ☐ Confirm any July 1 reporting requirements that apply to your agency. ☐ <i>Optional</i>: Check variance data completeness before Q3. ☐ <i>Optional</i>: Continue landscape tracking and assemble documentation for DWR/SWB review.	☐ Finalize Water Loss Audit review/validation work on your internal schedule. ☐ Prepare for applicable July 1 deadlines and submissions. ☐ <i>Optional</i>: Make sure potential variance datasets are analysis-ready.

Q3 | Classifications, Landscape Updates and Variances

Turn first-half preparation into action. Classification and landscape work should move toward approval, variance requests should advance where warranted, and annual usage analysis should begin before Q4.

JULY ~5 HOURS	AUGUST ~5 HOURS	SEPTEMBER ~5 HOURS
☐ Pull CII classification counts using the June 30 period-ending snapshot. ☐ Review classification totals, changes and exceptions; resolve obvious miscoding. ☐ Confirm any new July 1 reporting activities are in progress. ☐ Advance variance requests and supporting documentation, if applicable. ☐ <i>Optional</i>: Send new residential landscape area information to SWB for review/approval.	☐ Follow up on CII classification review/approval and document final counts. ☐ Continue variance request work and prepare a concise variance-status summary. ☐ Resolve classification or landscape issues before annual usage analysis begins. ☐ Confirm which CII datasets will be used for BMP review and high-user analysis. ☐ <i>Optional</i>: Follow up with DWR on residential landscape updates and requested clarifications.	☐ Start reviewing annual usage data; review any UWUO form data available (residential outdoor budget may show zero until climate data is added). ☐ Run the high-water-user analysis and identify outliers requiring review. ☐ Pair approved CII classifications with annual usage results. ☐ Create the working dataset that will feed October/November program and reporting review.

Landscape note: This draft uses July/August as the working window for residential new-landscape updates. Commercial landscape treatment should be updated when the applicable post-2027 requirements and DWR process are confirmed.

Q4 | Build the Report, Review Programs and Finish Early

By Q4, the objective is to assemble and test—not discover basic data problems. Climate data and updated forms come into view, CII analysis can inform program review, and the team moves through deliberate QA/QC before the holidays.

OCTOBER ~5 HOURS	NOVEMBER ~5 HOURS	DECEMBER FINAL ASSEMBLY
☐ Review updated UWUO reporting forms, instructions and available webinars. ☐ Review ETo and effective precipitation when available and test the impact on the objective. ☐ Begin populating the UWUO working form and pull remaining source data. ☐ Using approved CII classifications and usage analysis, review CII BMP/program opportunities and DIMS-related needs. ☐ Pull/review CEC disclosable-building data if the current update is available.	☐ Complete the draft UWUO and begin team QA/QC. ☐ Ask: How are we looking? What changed? What requires clarification? ☐ Resolve data questions with internal owners and state staff while time remains. ☐ Continue CII BMP/program and DIMS review using classification/high-user findings. ☐ Pull/review CEC disclosable-building data if the annual update timing falls here. ☐ Attend updated reporting webinars and capture process changes.	☐ Week 1: finalize the UWUO report and complete final QA/QC. ☐ Week 2: obtain required signature(s) and complete the certification process. ☐ Upload and submit before holiday absences create avoidable risk. ☐ Use December for final assembly—not first-time review of locked upstream reports. ☐ Archive the final report, calculations, source files and issue log for next January.

What Does ~5 Hours a Month Buy You?

The point is not that every agency will spend exactly five hours every month. The point is to reserve a small, predictable block of time for data stewardship, so the annual report is assembled from information you already understand.

A TYPICAL 5-HOUR BLOCK

- ☐ 60 min: Review new reporting updates, flags and correspondence.
- ☐ 90 min: Reconcile one or two upstream datasets against internal records.
- ☐ 60 min: Pull the month/quarter's scheduled dataset or analysis.
- ☐ 60 min: Investigate exceptions, outliers or classification questions.
- ☐ 30 min: Update the issue log, assign owners and save supporting files.

WHAT YOU AVOID IN DECEMBER

- ☐ Reconstructing a year of decisions and source files.
- ☐ Discovering mismatched connection, production or classification data after upstream reports are locked.
- ☐ Trying to obtain clarifications while state staff and your own team are out for the holidays.
- ☐ Running high-user/CII analysis for the first time while simultaneously completing the UWUO.
- ☐ Compressing team QA/QC and management review into the final days before submission.

Recurring Monthly Questions

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What changed? Connections, landscape, classifications, production, reporting instructions.	Do the datasets agree? Compare overlapping values before discrepancies become embedded.	What needs an owner? Turn every flag into a named action, due date or documented N/A.

Preparing for Future Deadlines

Your annual reporting calendar is only part of the picture.

Use your January/February reporting check-in to look beyond the current year, assess readiness for upcoming requirements, and build longer-term work into your schedule.

2027

- ☐ **July:** Classify all CII water users
- ☐ **July:** Deadline to identify high water use CII customers using 974(c)(2) method
- ☐ **July:** CII MUM – Option 1: Measure and identify CII MUMs with large landscapes
- ☐ **July:** Water Loss: Updated asset management questionnaire due.

2028

- ☐ **January:** Meet Water Loss standard
- ☐ **July:** Dedicated Irrigation Meter (DIM) Landscape Area Measurement (LAM) required for CII-DIM standard

2029

- ☐ **January:** Water Loss Leak Registry due
- ☐ **July:** CII MUM – Option 2: Identify all existing CII water users associated with a large landscape and for which estimated outdoor water use exceeds the water budget calculated pursuant to subdivision
- ☐ **July:** Deadline to identify high water use CII customers using 974(c)(3) method

Timing Note: Upcoming compliance deadlines identify when the required work must be completed; they are not separate reporting deadlines, except for water loss items. Compliance with these requirements is reported through the subsequent UWUO—for example, a July 2027 compliance requirement would be reported in the UWUO due January 1, 2028.

Acronyms

Acronym	Meaning
AIR	Annual Inventory Report (Report)
BMP	Best Management Practice
CEC	California Energy Commission
CII	Commercial, Industrial, and Institutional
DIM	Dedicated Irrigation Meter
DIMS	Dedicated Irrigation Meter Standard
DWR	California Department of Water Resources
eAR	Electronic Annual Report (Report)
ETo	Reference Evapotranspiration
LAM	Landscape Area Measurement
MUM	Mixed-Use Meter
QA/QC	Quality Assurance / Quality Control
SAFER	Safe and Affordable Funding for Equity and Resilience (Report)
UWUO	Urban Water Use Objective (Report)