

PREFACE

ABOUT THIS GUIDE

Overview

The ESP (Energy Service Provider) Services organization within PG&E, a group dedicated to providing information and guidance to ESPs, has compiled information in this document which will assist ESPs with preparing to do business under Direct Access (DA). This information reflects the latest California Public Utilities Commission (CPUC) decisions on DA. Please note that content of this document is subject to change over time as the CPUC issues further decisions relevant to DA.

Disclaimer and Warning

PG&E has provided these guidelines for informational purposes only.

In the event of any conflict between the guidelines contained within this handbook and the DA tariffs and Energy Service Provider Service Agreement approved by the CPUC, the tariff and the Energy Service Provider Service Agreement shall control.

The procedures adopted for other California utilities may differ from those of PG&E.

Note that the DA Suspension Decision (D.) 02-03-055, dated March 21, 2002, issued by the California Public Utilities Commission, may have an impact on the qualification of customers for participation in DA.

Summary of Chapters and Contents

- **Chapter 1: Electric ESP Direct Access Preliminary Procedures** - discusses the preliminary documentation which needs to be signed and sent to PG&E prior to the submission of Direct Access Service Requests (DASRs).
- **Chapter 2: Direct Access Setup** - covers information about electronic information exchange setup requirements under DA.
- **Chapter 3: Processing Direct Access Service Requests (DASRs)** - discusses how Electric ESPs electronically communicate service requests related to DA to PG&E.
- **Chapter 4: DA Electronic Data Exchange Contingency Plans** - discusses contingency plans for the handling of DASRs should one or more elements of electronic DASR processing fail.
- **Chapter 5: Metering** - covers DA interval metering issues including the prioritization and forecasting of installation requests; phone service quality and billing requirements; and customer service for Electric ESPs.
- **Chapter 6: DASR Processes for Metering Data Adjustments and Changes** - provides Electric ESPs with information on PG&E DASR processes related to metering data adjustments and DA account commodity status changes.
- **Chapter 7: Electric ESP Account Billing** - contains information on the billing options which Electric ESPs can offer to their DA customers.
- **Chapter 8: Customer Information Releases** - details the types of customer information which Electric ESPs can obtain from PG&E.

Chapter Organization

Chapters 1 through 3, which describe sequential, step-by-step procedures, follow a consistent organizational format as described below.

Overview

This section, which provides an overview of the chapter topic material and related processes, emphasizes the most important concepts within the chapter.

Prerequisites

The prerequisites to the procedures covered in the chapter are detailed, ensuring that the Electric ESP is ready for the steps to follow.

Checklist of Key Steps

Key process steps are briefly described within a checklist format which identifies critical elements.

The [Chapter Topic] Process Illustrated

Visuals are an effective way to convey process information. When appropriate conceptual-level flow diagrams have been included to illustrate main process steps.

Procedures

This section provides a detailed discussion of items identified within the Checklist of Key Steps.

