

<b>Rule 24 Steps Checklist</b>	<b>Complete [Y/N]?</b>
<b>STEPS WITH PG&amp;E</b>	
DRP to complete the " <b>DRP Information Request Form</b> " and return it to DRPrelations@pge.com.	
PG&E Rule 24 team to schedule an informational onboarding Webinar with the DRP to review set up steps, CISR process, Click-Through, data access, and other topics related to Rule 24.	
DRP to register as a standard user for PG&E's <b>Share My Data (SMD)</b> platform. This platform and its supported APIs is used to enable online authorization functionality and to provide Rule 24 data elements to DRPs. ( <a href="http://www.pge.com/sharemydata">www.pge.com/sharemydata</a> )	
PG&E Rule 24 team to initiate set up process for the DRP's use of <b>Electronic Secure File Transfer (ESFT)</b> . ESFT is a secure file transfer system used by DRPs to submit CISR-DRP forms to PG&E for processing.	
DRP to notify the PG&E Rule 24 team (DRPrelations@pge.com) of completed SMD registration and connectivity.	
DRP to review the following PG&E guidance documents, available on PG&E's Rule 24 DRP website: <ol style="list-style-type: none"> <li>1. Steps for a DRP to Obtain Customer Information for Rule 24.</li> <li>2. Instructions for Completing the CISR-DRP Form Version 3.0.</li> </ol>	
DRP to sign the <b>DRP Service Agreement</b> – Form 79-1160 and email the signed agreement to PG&E's Rule 24 team at DRPrelations@pge.com. This step is only required if the DRP will serve PG&E bundled customers.	
<b>STEPS WITH CPUC</b>	
DRP to complete the CPUC's " <b>Demand Response Service Provider Registration Application Form</b> " and maintain a valid DRP registration at the CPUC (required if the DRP will serve PG&E bundled customers).	
DRP to provide the CPUC a <b>performance bond</b> under the name of the CPUC as a security deposit or financial guarantee bond in the amount indicated in Rule 24. This step is only required by DRPs serving PG&E's residential and/or small commercial customers with peak demand < 20 kW.	
<b>STEPS WITH THE CAISO</b>	
Read the CAISO's "Demand Response User Guide" (Version 5.0, Nov 1, 2024) on the <a href="#">CAISO demand response webpage</a> .	
Read the CAISO's Business Practice Manuals (BPM) applicable for Demand Response. See link to <a href="#">CAISO BPM Library</a> .	
Execute necessary service agreements for registering resources with CAISO.	
Follow the CAISO procedures to enter locations in the CAISO's Demand Response Registration System (DRRS)	
Follow the CAISO procedures to obtain a CAISO PDR resource ID.	