Steps for a DRP to Obtain Customer Information for Electric Rule 24

I. *Setup Process for Demand Response Providers (DRPs)*

1. Complete PG&E's DRP Information Request Form and return to PG&E's Rule 24 Team at DRPrelations@pge.com.

2. Get set up as a Standard User in PG&E's Share My Data (SMD) platform, and alert the PG&E Rule 24 Team when this has been completed. Completing your registration for SMD is vital as it is the platform that enables customers to authorize PG&E to release their personal electricity-related information via an electronic authentication and authorization process to DRPs (referred to as Click-Through). Additionally, SMD is utilized by DRPs to obtain the complete Rule 24 data set elements for each authorized customer via API service.
   a. Register as a Standard User for SMD.
   b. Select one of the three Standard User registration types applicable to DRPs:
      i. **Standalone:** Select Standalone if you only want customers to authorize your company to receive data.
      ii. **Primary:** Select Primary if your company is collaborating with another DRP to provide demand response services to customers under Rule 24. As a Primary registrant, your company will participate directly in the OAuth sequence and determine the data authorization parameters that will apply to both you and your partnering DRP – the Secondary registrant.
      iii. **Secondary:** As with the Primary, the Secondary registration type applies only to DRPs who are collaborating with another DRP to provide Rule 24 demand response services. The Secondary registrant inherits the data authorization parameters established by the Primary.
   c. Complete all required SMD tests, including API connectivity tests and OAUTH 2.0 tests.

3. PG&E's Rule 24 team will initiate the set up process for the DRP's use of the Electronic Secure File Transfer (ESFT) site. After the folder structure has been set up you will receive an email from PG&E's ESFT group providing you with an initial set of ESFT account log-in credentials that you can customize for your business needs.

4. PG&E will send you a unique ten-digit DRP ID. (Note: For DRPs who will be obtaining customer authorizations using the CISR-DRP form, you will enter the DRP ID(s) onto the form.)

5. Once you have been setup in both SMD and ESFT, PG&E will send you an email confirmation that you have achieved the necessary connectivity to receive customer data.

6. You are now able to utilize the Click-Through online authorization process, submit CISR-DRP forms for processing and utilize SMD API services to access customer data.

NOTE: If you plan to include a second DRP as a data recipient for customer authorizations, then both DRPs must be set up in SMD and ESFT in order to receive the data.

II. Completing the CISR-DRP

1. Please review PG&E's "CISR Form 2.0 Instructions" guidance document.

2. Use the PG&E supplied fillable PDF to complete the form. It is designed to help reduce errors.

a. For the fastest processing, please use the following settings for your scanners:
   - 300 dots per inch (DPI)
   - Maximum compression

3. The DRP works with the customer to complete the CISR. This step can be performed many different ways. For example, the DRP could complete the form and send it to the customer or the DRP's website could present the completed form for the customer to download from the website.
4. The customer signs the CISR and sends it to the DRP. Transmittal of the customer-signed form to the DRP can be done via US mail, scan and e-mail, or fax.

5. The DRP signs the completed customer-signed form.

6. The DRP scans the completed customer-signed and DRP-signed form.

NOTE: PG&E is accepting e-signatures from a variety of e-sign vendors, such as Adobe eSign and DocuSign. Additional information on acceptable signatures for use on the form is found in PG&E's "CISR Form 2.0 Instructions" guidance document.

III. Submitting the CISR-DRP to PG&E for Processing

1. Each CISR-DRP form needs to be saved in PDF format in its own file. Do not combine multiple CISR-DRP forms into a single pdf file. Doing so will cause the PG&E intake process to fail.
2. You must save the PDF file using a file name that starts with "DRP_1000000XYZ…." (the number chain must exactly match your PG&E assigned unique 10-digit DRP ID).

   a. Your ESFT site will contain a main folder and two sub-folders. The main folder will be named DRP_1000000XYZ where the 1000000XYZ is replaced with your PG&E assigned DRP ID. The sub-folders will be named Vendor_To_PGE and PGE_To_Vendor.
      - You will use the Vendor_To_PGE folder to submit completed CISRs to PG&E using the CISR-DRP file naming protocol described above.
      - PG&E will use the PGE_To_Vendor folder to send you weekly reports identifying CISR forms that we have rejected for processing due to the forms not being completed correctly or due to the forms otherwise failing PG&E's form validation process. PG&E will also use this folder to send you notices of any CISR revocations that we have processed and lists of CAISO locations that we have rejected under Rule 24.
      - **Do not** send customer identifying information to PG&E via email.

IV. Utilizing the Click-Through Online Authorization Process

1. In order to utilize PG&E's online authorization process (OAUTH 2.0) for Rule 24, DRPs must complete all of the steps listed under Section *I. Setup Process for Demand Response Providers (DRPs).*
2. Contact PG&E's Rule 24 team at DRPrelations@pge.com for additional documentation and support for getting set up to use Share My Data.
3. PG&E customers follow these steps to authorize the release of their information:
   a. To start the Click-Through process, the customer selects a link on a DRP's website that goes to PG&E's Share My Data login page.
   b. The customer uses the username and password for their PG&E online account to sign in. Alternatively, the customer can log-in using the "Guest Access" tab and providing their Account ID, phone number and email address.

c. A screen will appear that identifies the DRP(s) requesting access to the customer's data, the various categories of data to be shared, the electric service accounts for which data is to be shared, and the duration or timeframe of the data sharing that the DRP(s) requested.
d. The customer then selects the "Submit" button to complete the authorization process. After selecting "Submit" the customer will be returned to the DRP's website.

V. Utilizing Share My Data to Obtain the Rule 24 Data Set Elements

1. The Rule 24 data set elements are made available to DRPs via API services for each customer authorization.
2. Contact PG&E's Rule 24 team at DRPrelations@pge.com for documentation on utilizing the SMD data access API services.