

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

PLEASE NOTE THAT THE FOLLOWING STEPS ARE SUBJECT TO CHANGE

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 to receive data via PG&E's ShareMyData (SMD) platform (www.pge.com/sharemydata), and alert the PG&E Rule 24 Team when this has been completed.
3. Get set up to send and receive data via PG&E's Electronic Secure File Transfer (ESFT) site. PG&E's Rule 24 Team will provide you with the contact information for PG&E's ESFT group.
4. PG&E will send you a unique ten digit DRP ID, which you will enter onto the CISR-DRP.
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 submit CISR-DRP ("CISR") forms via the ESFT site.
7. 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.
8. You must save the pdf file using a file name that starts with "DRP_100000XYZ...." (the number chain must exactly match your PG&E assigned unique 10-digit DRP ID).

Your ESFT site will contain a main folder and two sub-folders. The main folder will be named DRP_1000000001 where the 1000000001 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.
- PG&E will use the PGE_To_Vendor to send you the customer data in CSV format. The name of the files that PG&E uploads to this subfolder will begin with the ten-digit DRP ID followed by a date /time stamp. An example is: [100000XYZ_RULE_24_EXTRACT_20160225_160626.csv](#)

NOTE: If you plan to include a second DRP on the CISR form, then both DRPs must be set up in SMD and ESFT to receive the data.

II. Completing and submitting the CISR form

Please review the attached Instructions for Completing the CISR-DRP.

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

For the fastest processing, please use the following settings for your scanners:

- 300 dots per inch (DPI)
- Maximum compression

A. Submitting a CISR with wet signatures or a scan of wet signatures:

1. DRP works with customer to complete the CISR and get a paper copy of the completed CISR to the customer. (This step can be performed many different ways. The DRP could complete the form and send it to the customer. The DRP's website could present the completed form to the customer who could download the completed form from the DRP's website.)
2. The customer ink signs the paper 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.
3. The DRP ink signs a paper copy of the completed customer-signed form.
4. The DRP scans the completed customer-signed and DRP-signed form.
5. The DRP posts the scanned image to PG&E's ESFT site under the "Vendor_To_PGE" subfolder.

B. Submitting a CISR-DRP with electronic signatures:

1. DRP works with the customer to complete the CISR. (This step can be performed many different ways. The most likely is that the DRP's website would present the completed form to the customer.)
2. The customer electronically signs the form.
3. The DRP(s) electronically sign the completed customer e-signed form.
4. Attach the one-page e-signature Certificate of Completion corresponding to all of the electronic signatures used on the form to the CISR-DRP and save as a single pdf file following the file naming instructions described in Section I.7 above.

5. The DRP posts the e-signed form to PG&E's ESFT site under the "Vendor_To_PGE" subfolder.
6. PG&E is accepting e-signatures using the following two vendors: (1) Adobe eSign (formerly EchoSign); and (2) DocuSign.

Additional Items -- For Your Information Only:

1. PG&E will be sending the attached letter to the PG&E Customer of Record notifying them that the DRP(s) have been authorized to receive data and take certain actions.
2. The customer will also receive the attached e-mail from PG&E when the SMD process is complete.