

| Rule 24 Steps Checklist | Complete [Y/N]? |
|---|------------------------|
| STEPS WITH PG&E | |
| DRP to complete the " DRP Information Request Form " 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 Share My Data (SMD) platform. This platform and its supported APIs is used to enable online authorization functionality and to provide Rule 24 data elements to DRPs. (www.pge.com/sharemydata) | |
| PG&E Rule 24 team to initiate set up process for the DRP's use of Electronic Secure File Transfer (ESFT) . 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"> 1. Steps for a DRP to Obtain Customer Information for Rule 24. 2. Instructions for Completing the CISR-DRP Form Version 2.0. | |
| DRP to ink sign two originals of the DRP Service Agreement – Form 79-1160 and return both signed originals to PG&E Rule 24 team. This step is only required if the DRP will serve PG&E bundled customers. | |
| STEPS WITH CPUC | |
| DRP to complete the CPUC's " Demand Response Service Provider Registration Application Form " 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 performance bond 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. | |
| STEPS WITH THE CAISO | |
| Read the CAISO's "Demand Response User Guide" (Version 4.9, Oct 27, 2020). | |
| Read the CAISO's Business Practice Manuals (BPM) applicable for Demand Response. | |
| 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. | |