

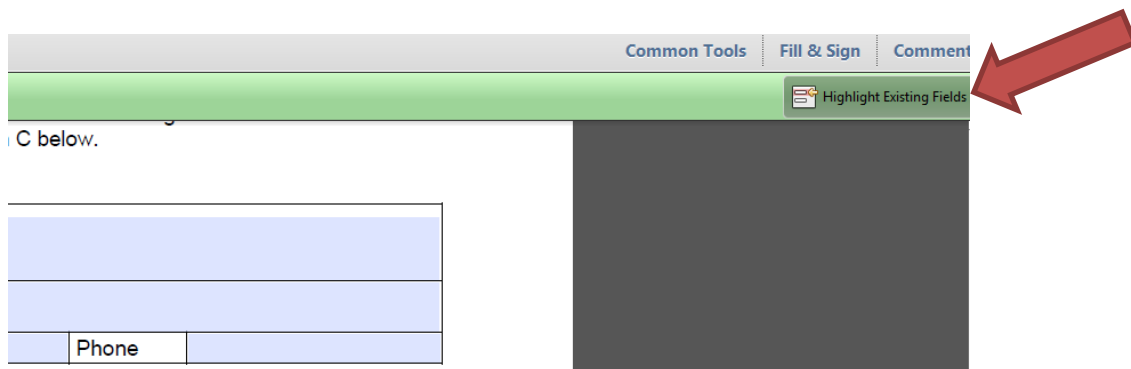
## Instructions for completing the Customer Information Service Request for Demand Response Providers (CISR-DRP) Version 2.0

The Customer Information Service Request (CISR-DRP) form allows you to exercise your right to disclose your personal electricity-related information to third-party Demand Response Providers (DRPs) so that you may obtain Demand Response services offered by DRP(s) pursuant to PG&E's Electric Rule 24. Effective February 12, 2018, PG&E is replacing CISR-DRP Version 1.0 with a new, shorter, version of the form: CISR-DRP Version 2.0. *This document provides instructions for completing the new CISR form.*

**Should you have any questions regarding how to complete the CISR-DRP form, please contact PG&E's Rule 24 team at [DRPrelations@pge.com](mailto:DRPrelations@pge.com).**

### **Helpful Tips:**

- This form is a fillable pdf so you can use your computer and Adobe Reader<sup>1</sup> to enter the information directly into the form.
- You can save, print, and e-mail this form using the tool bar functions available in Adobe Reader.
- You will need information from a recent PG&E monthly Energy Statement. So it is best to obtain a copy before you start.
- In Adobe Reader, pressing the "Highlight Existing Fields" button, which appears in the upper right corner of the Adobe Reader application, will highlight in blue those portions of the form where you can enter information. This is a great way to see which areas of the form accept user input.
- For the fastest processing please use the following settings for your scanners:
  - 300 dots per inch (DPI)
  - Maximum compression



<sup>1</sup> Adobe Reader can be download at no cost from the following locations:

Windows: <https://get.adobe.com/reader/>

Other Operating Systems: <https://get.adobe.com/reader/otherversions/>

## Steps for Completing the CISR:


### 1. Complete the customer information portion of the form and be sure to follow the correct formatting

|   |                           |  |       |                                     |
|---|---------------------------|--|-------|-------------------------------------|
| Customer Name According To PG&E Records | Sally Johnson             |  |       | Format phone number as ###-###-#### |
| Contact Name (if different from above)  | First                     |  | Last  |                                     |
| E-Mail                                  | sally.johnson@example.com |  | Phone | 999-999-9999                        |

*(You are required to provide at least your e-mail or phone number.)*

do hereby (check only one)  AUTHORIZE (sign Section D)  REVOKE (sign Section H) the following DRP(s):

- A. Provide Customer Name as stated on the PG&E Energy Statement. (See 1 below) Make certain that the entry exactly matches that shown on your Energy Statement.
- B. Contact Name (first name and last name) is required if it is different from the Customer Name (item A above), otherwise it can be left blank.
- C. An email or phone number is required (or a customer can complete both fields).
  - i. Be sure to format the phone number with dashes: ###-###-####. Entering a phone number in an alternate format will result in slower processing time of the CISR.
- D. Select either AUTHORIZE or REVOKE:
  - i. If the form is to AUTHORIZE, the customer will need to sign Section D "Customer Agreement".
  - ii. If the form is to REVOKE an existing authorization, and if the revocation is being initiated by the customer, then the customer will need to sign Section H "Customer Revocation of Authorization".
  - iii. If the form is to REVOKE an existing authorization, and if the revocation is being initiated by a DRP (not the customer), then the DRP needs to sign Section I (the customer does not need to sign section H).

|   |                                     |
|---|-------------------------------------|
|  <b>ENERGY STATEMENT</b><br><a href="http://www.pge.com/MyEnergy">www.pge.com/MyEnergy</a> | <del>Account No. 1023456789-0</del> |
|   | Statement Date: 04/04/2017          |
|   | <b>Due Date: 04/25/2017</b>         |

#### Service For:

1  
 Sally Johnson  
 1234 Main Street  
 Anytown, CA 00000

#### Your Account Summary

|  |         |
|--|---------|
| Amount Due on Previous Statement         | \$85.67 |
| Payment(s) Received Since Last Statement | -85.67  |
| Previous Unpaid Balance                  | \$0.00  |

**2. Complete the DRP Information portion of the form**

|                     |   |                 |   |
|---------------------|---|-----------------|---|
| Name of Primary DRP | E | PG&E Rule 24 ID | F |
| E-Mail              | G | Phone           | H |

*(Complete the following table only if you are authorizing data to be released to a collaborating DRP)*

|                       |   |                 |  |
|-----------------------|---|-----------------|--|
| Name of Secondary DRP | I | PG&E Rule 24 ID |  |
| E-Mail                |   | Phone           |  |

- E. Enter your DRP company name
- F. Enter your PG&E Rule 24 DRP ID. This is the 10 digit ID number you received from PG&E's Rule 24 team (e.g., 1000000####)
- G. Enter the DRP's email address
- H. Enter the DRP's Phone number
  - i. Be sure to format the phone number with dashes: ###-###-####. Entering a phone number in an alternate format will result in slower processing time of the CISR.
- I. Enter the relevant information for the Secondary DRP, if applicable. Fill in this section only **IF** partnering with a Secondary DRP

**3. Complete the Service Agreement table**

Access to the following electric Service Agreements:

| J | SERVICE STREET ADDRESS | K | SERVICE CITY | L | SERVICE AGREEMENT ID |
|---|------------------------|---|--------------|---|----------------------|
|   | 1234 Main Street       |   | Anytown      |   | 9087654321           |
|   |                        |   |              |   |                      |
|   |                        |   |              |   |                      |
|   |                        |   |              |   |                      |
|   |                        |   |              |   |                      |
|   |                        |   |              |   |                      |
|   |                        |   |              |   |                      |
|   |                        |   |              |   |                      |
|   |                        |   |              |   |                      |

*(You can include an additional 15 service agreements by attaching a list to this form.)*

- J. Enter the Street Address corresponding to the customer's Service Agreement ID that is to be authorized. This field should reflect only the house or apt number and the street name as it

appears on the Energy Statement. (See 2 below) Do not enter the city, state and zip code in this field.

- K. Enter the Service City here as stated on the Energy Statement
- L. Enter the Service Agreement ID for the customer's main PG&E electric service (not gas service) in the Service Agreement ID field. (See 2 below)
  - i. Do not enter the customer's Account No in the Service Agreement ID field
  - ii. Be sure not to enter the "Sub SA" associated with a customer's Community Choice Aggregator (CCA) electric service. This caveat applies only to customers receiving electric service by a CCA.

Note: An additional 15 Service Agreement IDs can be provided on a supplemental page. If you do submit a supplemental page, be sure to notify the PG&E Rule 24 team at DRPreations@pge.com.

Example of Energy Statement:

**ENERGY STATEMENT**  
www.pge.com/MyEnergy

~~Account No. 1023456789-0~~  
Statement Date: 04/04/2017  
Due Date: 04/25/2017

**Details of Electric Charges**  
03/04/2017 - 04/03/2017 (30 billing days)  
Service For: 1234 Main Street  
Service Agreement ID: 9087654321  
Rate Schedule: E1 TH Residential Service

**Service Information**  
Meter # 1098765432  
Total Usage 703.000000 kWh  
Baseline Territory T  
Heat Source Electric  
Serial R  
Rotating Outage Block 50

**Additional Messages**  
**PLEASE NOTE:** You are enrolled in a Tiered

#### 4. Complete the Timeframe of Authorization section

**A. TIMEFRAME OF AUTHORIZATION (Check only one option below.)**

Begin today and continue until \_\_\_\_\_ (mm/dd/yyyy) or until revoked by Customer or DRP.

Begin today and continue indefinitely or until revoked by Customer or DRP.

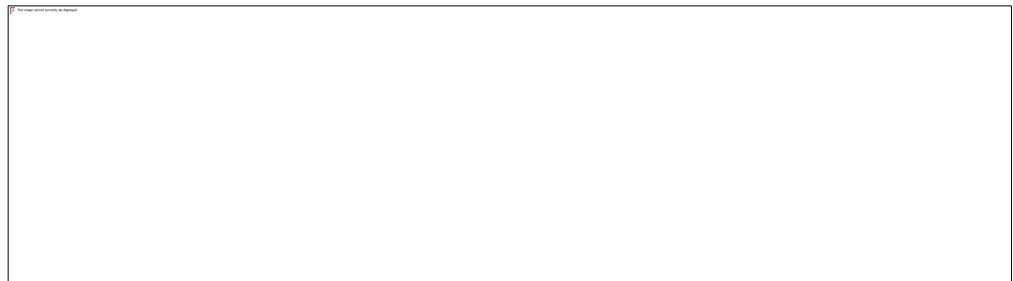
In all cases, the Authorization for a Service Agreement will be automatically revoked when the Service Agreement is closed by the Customer.

- M. Select one of the two options for the effective timeframe for the authorization.
  - i. If selecting the first option, be sure to specify an authorization end date in the field provided using the mm/dd/yyyy format.
  - ii. Select the second option for authorizations with an indefinite time frame.

#### 5. Provide signatures and dates

- A. For new Authorizations:
  - i. The customer signs and dates in Section D "Customer Agreement".

- ii. The Primary DRP signs and dates in Section E “Primary DRP’s Agreement Regarding Customer Release Authorization”.
  - iii. **IF** there is a partnership with a Secondary DRP, then the Secondary DRP will also sign and date in Section F.
- B. For Revocations: .
- i. If the **customer** is initiating the revocation, then the customer will need to sign Section H “Customer Revocation of Authorization” ( DRPs do not need to sign Section I).
  - ii. If the revocation is being initiated **by the DRP** (not the customer), then the DRP needs to (1) insert the date of actual or anticipated revocation or discontinuation and (2) sign Section I (the customer does not need to sign section H).
- C. Acceptable Forms of Signature
- i. Wet Signatures: The customer and the DRP can ink-sign and date the form.
  - ii. Electronic Signatures: PG&E is accepting e-signatures from a variety of e-sign vendors, such as Adobe eSign and DocuSign. In addition, the Rule 24 team is accepting another form of e-signature as illustrated in the image below. The first is for IPv6 and the second is for IPv4. The IP address shown must be a routable IP. Please note that a time stamp for the signature is also required.



## **PG&E’s CISR-DRP Form Validation Steps**

For each CISR-DRP form that is submitted to PG&E’s Rule 24 team, PG&E reviews the form to validate that the form is fully completed and is actionable for processing. As part of the form validation process, PG&E applies a number of algorithms to compare the information entered in specific fields on the form against the corresponding information in PG&E’s system of record. The following form fields are subject to match comparison algorithms:

1. Customer First Name and Last Name
2. Service Address: specifically the (i) house/building number and (ii) the street address
3. Service City

The algorithms are designed to identify cases where there are minor discrepancies between the information entered on the form and the information contained in PG&E’s billing system, such that minor misspellings or variations of names (e.g., Judy instead of Judith) do not result in a rejection of the CISR form.

Additional automated validation checks are used to determine for each CISR the following:

- Are all required form fields populated?
- Is the DRP information section of the form consistent with the DRP registration information on file with the Rule 24 team?
- Is the customer's Service Agreement ID consistent with PG&E's system of record?
- Are all required signatures and dates provided?

For each instance where a CISR form does not successfully pass the validation process, a Rule 24 team member will manually investigate the validation error(s) and determine whether the error(s) can be resolved.