

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, 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 4.3, May 5, 2017).	
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 / RDRR resource ID.	